

The Job and Department Increase Analysis Template will provide valuable insight about the health of your organization’s Annual Merit Increase Program. Depending on which version you order, you will be able to quickly and easily obtain a summary breakdown and graphs of the total increases per department, job title, and gender. These include charts and graphics to visually represent average increase information, budgeted vs actual increases, the highest increase amounts vs. average increase amounts, and more information about 10 departments.

Step 1 – Insert Merit Increase Data into Template

- To administer and calculate merit increases and do program assessment all in 1 file, use file name: Merit Worksheet and Combo Analysis. This file combines everything with extra tabs/pages linked together to save you time in data entry. See the separate PDF for the 1st part about how to administer the recommended increases – Merit Increase Worksheet Directions.
- To simply conduct a Merit Program Assessment, where you’ve already completed the merit increases, you can use the file name: Merit Analysis Only – Job-Dept-Gender. Here you can simply paste your merit increase data, into the Merit Increase Details page:
 - The Merit Increase Amount and Proposed Final Salary will automatically calculate for you based on the data you provide about the current salary and actual percentage proposed.
 - For the data at the top, submit the ‘Budget %’, and the other data will calculate automatically.

Merit Review		Merit Review	
Base Currency		USD	
Total Previous Base Salary	5,445,410.77		
Budget %	5%		
Budget Amount	279,265.64		
Existing Base Salary inc. Budget	5,717,366.31		
New Base Salary (based on proposed increase)	5,696,808.32		
Remaining Budget	20,557.98		

*update this column to all 'Y' with formula

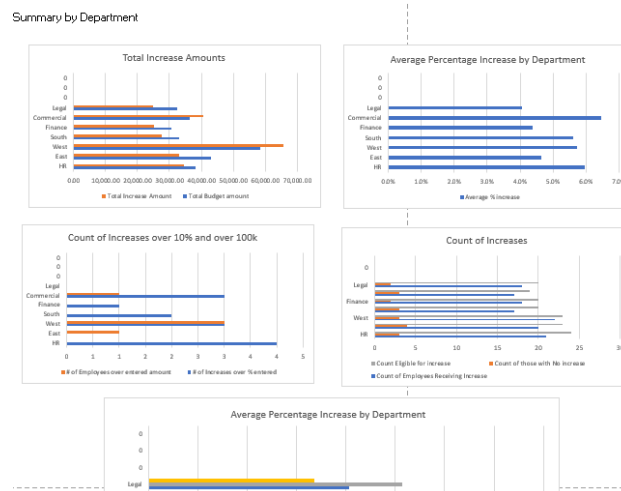
Employee ID or Number	Employee Name	Date of Hire	Gender (needs to be M or F for gender analysis)	Title	Department	Current Salary	Actual Merit % Proposed - Enter Proposed Merit here	Merit Increase Amount	Proposed Final Salary After Increase	Eligible for Increase?	Enter Reason (DOH, rating, etc.)
1	example 1 name		M	QA Coordinator	HR	30,000.00	12.00%	3,600.00	33,600.00	Y	
2	exampl 2 name		F	QA Analyst	HR	40,000.00	4.00%	1,600.00	41,600.00	Y	
3	example 3 name		F	QA Analyst SR	HR	50,000.00	5.00%	2,500.00	52,500.00	Y	
4	example 3 name		M	Engineer	East	30,000.00	8.00%	2,400.00	32,400.00	Y	
5	example 3 name		F	Engineer SR	West	40,000.00	3.00%	1,200.00	41,200.00	Y	
6	example 3 name		F	Manager QA	East	50,000.00		0.00	50,000.00	Y	
7	example 3 name		M	Engineering Manager	West	60,000.00	4.00%	2,400.00	62,400.00	N	
8	example 3 name		F	QA Coordinator	East	70,000.00	7.00%	4,900.00	74,900.00	Y	
9	example 3 name		F	QA Analyst	West	80,000.00		0.00	80,000.00	N	

Step 2 – Assign Departments and Job Titles for Summaries

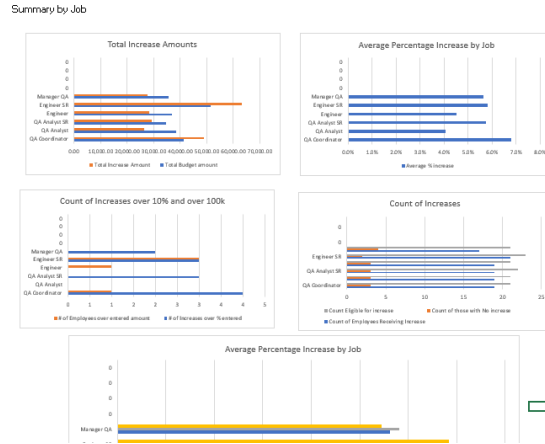
- Assign the departments and job titles you wish to summarize in column A in the corresponding pages: **Summary by Department and Summary by Job**.

- Count of those who received 10% and higher increases (or any percentage you would like to review).
 - Count of those who are over \$100,000 or any amount you would like to review.
 - Count of those who were eligible for an increase but didn't receive one.
- **If you ordered the Department-Job Analysis version**, you will have charts to summarize a comparison of increases across the departments and by jobs.

- **'Department Charts' Page:** This page will provide you 4 charts for a comparison of all 10 departments together. The charts summarize data about:
 - Total budgeted vs. actual increase amounts.
 - Average percentage increase per department.
 - Count of increases over 10% or over 100,000 (which can be edited to show any amount or percentage threshold you'd like to review counts on).
 - Count of those eligible, not eligible and those who received an increase.



- **'Job Charts-1st 10' and 'Job Charts-2nd 10':** These pages will provide you charts for a comparison across jobs. The charts summarize data about 20 jobs (10 on the first page and another 10 on the second page):
 - Total Increase Amounts.
 - Average Percentage Increase by Job.
 - Count of Increases.
 - Count of Increases over 10% and over 100K.
 - Average Percentage Increase by Job.



- *If you ordered the combined version, you will have all the above features.*

These videos also go through how to use the merit worksheet:

Merit Part 1:

<https://www.youtube.com/watch?v=2xp2Aq242hg&t>

Merit Part 2:

https://www.youtube.com/watch?v=_iP6_ecBNRQ&t

If you have any questions or to request modifications:

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