

Feature Overview

Compensation Workflow

Even before it was initially released, we knew how important Compensation was for our users. Since then we've been working hard to improve it with additional features, new integrations, and interface tweaks so you can easily run through cycles and provide employees with the merit bumps they've earned.

And now we're at it again, this time delivering a true workflow for those worksheets. Where approvals used to be manual checkboxes on the worksheet itself that didn't lead to any follow-up actions, the new compensation workflow has the ability to automatically create tasks for users when it's time to complete, review, and sign off on completed compensation cycles.

What is it exactly?

Compensation workflow boils down to a worksheet routing feature that triggers tasks along the way. At certain stages along the compensation process, users receive tasks for them to perform various functions on the worksheet itself – from completing it, to reviewing it, and finally signing off.

Here's how it works:

1. A compensation cycle becomes active, creating a **Compensation – Worksheet** task for the compensation manager. This task launches the compensation worksheet that they must complete for the included employees. Managers no longer have to manually check the *Compensation* page for active cycles since this task automatically points them in the right direction at the right time.

Show Filter Options							
Task	Task Title	Due Date	Assigned To	Employee	Employee Position	Employee Department	
Compensation - Worksheet	Current Comp Cycle	10/03/2044	Abernathy, Brian	Abernathy, Brian	Secretary	Administration	

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2. When the manager is finished updating the worksheet, they route it to another user for approval. They have the option of sending it to their direct manager, who always appears in the **Route To** dropdown list, or another compensation approval user that's available in the list. (Don't worry, we explain how to determine who shows up in the **Route To** list later in this document.)

Send for Approval ✕

* Route To: Maher, Angela ▼

Comments: R. Johnson was exceptional this year. His bonus is larger than usual for that reason.

86 / 500

Send
Cancel

There's also an additional **Comments** text box to add notes about the worksheet if necessary.

- After the manager has selected a user and routed the worksheet, that user receives a **Compensation – Approval** task. This task requires them to review the worksheet and provide approval before it is completed.

Show Filter Options							
Task	Task Title	Due Date	Assigned To	Employee	Employee Position	Employee Department	
Compensation - Approval	Current Comp Cycle	05/19/2016	Maher, Angela	Abernathy, Brian	Secretary	Administration	

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- Clicking the **Compensation – Approval** task opens a read-only view of the worksheet. Under the worksheet is a Routing History table that lists previous routing actions, such as the initial manager completion and any comments they left.

When the review of the worksheet is done, the user can either route the worksheet to another user for further review using the available **Send for Approval** button, or **Complete** the workflow and finalize the approval. Clicking **Complete** sends the worksheet to HR for final processing.

Routing History			
From	To	Date Routed	Comments
Abernathy, Brian	Maher, Angela	5/16/2016	R. Johnson was exceptional this year. His bonus is larger than usual for that reason.

Note: An available setting for cycle configurations determines if a worksheet requires all levels of approval before it can be completed.

- The final step in the compensation workflow is a signoff task for employees on the completed worksheet. They receive a **Sign Compensation Summary** task that only requires them to review their compensation and provide signoff.

Show Filter Options							
Task	Task Title	Due Date	Assigned To	Employee	Employee Position	Employee Department	
Compensation	Sign Compensation Summary	05/19/2016	Abernathy, Brian	Abernathy, Brian	Secretary	Administration	

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Once an employee signs off on their summary task, the compensation worksheet is saved to their employee profile (*Compensation* page under **My Folder**) in a read-only view.

Employees may also have the option to **Reject** the worksheet summary, which returns the worksheet to the compensation manager. The employee is required to provide comments when rejecting a worksheet.

How do I use it?

Getting up and running with compensation workflow is pretty easy, especially since the feature is already enabled for all clients using Compensation.

The first step is to make sure routing users are set up the way you want. This includes both the employees that are required to route worksheets for review and those to whom you can route worksheets. Thankfully these settings are configured on the same page: *Routing Users* under the **Admin** area.

When you add a new routing user from this page, or even edit an existing user from the table, the *Routing Settings* page has two options available for the **Compensation Approval** option. Here's how they work:

- **Routing Enabled.** Check this option if you want worksheets routed TO this employee for review. This means the employee appears as an option in the **Route To** drop-down list when sending a worksheet for approval.
- **Routing Required.** Check this option if you want to force the employee to route worksheets they have completed to other employees for review. This means the employee is responsible for completing compensation worksheets, but you want them to route them for review by another employee.

Routing Item Types:		
Item Type	Routing Enabled	Routing Required
Feedback Tasks	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Job Description Approval	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Review Performance Goals Form	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Compensation Approval	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

So, if you want to force managers completing compensation worksheets to route them when they're done, check off that *Routing Required* option. If that option is **not** checked, the manager can still route worksheets if they want, but they'll also have the ability to complete the worksheet without routing.

The last setting to consider lives on the *Compensation Cycle* page where you set all the desired options for a compensation cycle, either during initial creation or editing. The form on that page has an option to enable those final summary sign-off tasks that is sent to employees once compensation worksheets are finalized.

Routing: Send Sign-Off task when routing is complete