

# Web-Based Merit System

## Frequently Asked Questions

### General Questions

How do I get an account to enter merits for my department?

What determines an employee's eligibility for a merit?

What is the order of salary adjustments that have the same effective date?

### Merit Roster Questions

How can I determine why an employee is included in the roster?

What do I do if someone is missing from my roster?

When should I delete an employee from the roster?

How do I handle an employee with a temporary reclassification or stipend?

What do I enter for the performance evaluation rating and date?

How do I get my own merit entered, if I'm the department preparer?

How do I handle an employee who is close to or at the salary range maximum?

How do I handle an employee who is at the salary range minimum?

How do I download my merit roster?

### General Questions

***How do I get an account to enter merits for my department?***

Use the "Request for Access to PPS" form on Accounting's web site:

<http://accounting.ucsb.edu/Forms/view.cfm?form=cs-pps-access-request>

For specific access account questions, please call LoAn Piela in Accounting at x2880.

***What determines an employee's eligibility for a merit increase?***

Eligibility requirements will vary according to the contract or policy. Please refer to the guidelines and procedures for the specific merit population.

***What is the order of salary adjustments that have the same effective date?***

In general, if more than one salary adjustment takes place on the same date, actions occur in the following order:

1. Merit increases or, if applicable, salary increases for employees who hold temporary appointments;
2. Salary action resulting from promotion, reclassification, transfer, demotion, or equity adjustment; and
3. Salary range adjustment (if applicable).

# Web-Based Merit System

## Frequently Asked Questions

NOTE: The order of salary adjustments may vary according to the contract or policy. Please refer to the appropriate document for specifics.

### Merit Roster Questions

#### *How can I determine why an employee is included in the roster?*

On the roster screen, click on the employee's name in order to see what data was present in PPS at the time of the roster "snapshot". An employee is selected for the roster based on the data present in a number of fields on PPS.

Important fields in PPS that are used in employee selection include:

<u>Screen</u>	<u>Field</u>	<u>Data needed to indicate merit eligibility</u>
EAPP	Appointment Type	'2' (Career) or '7' (Partial-Year Career)
EAPP	Distribution End Date	At least one distribution needs to end on or after the merit effective date
EPER	Next Salary Review Date	Needs to be the merit effective date or earlier
EPER	Next Salary Review Type	Should display '2' or '3', as appropriate
EPER	Employee Relations Code	Needs to reflect appropriate code

#### *What do I do if someone is missing from my roster?*

During the preliminary roster stage, departments should determine whether an eligible employee is missing from the roster and make the necessary corrections in PPS, *before* the final roster is created. See the previous question/answer above to help determine what fields may need to be adjusted in PPS.

If an employee is missing from the final roster, you will not be able to add him to the roster. Wait until the web process is completed to enter his new rate to PPS manually, using Action Code '04'. Along with processing this action in PPS, an email or memo must be sent to Human Resources stating the employee's performance rating.

#### *When should I delete an employee from the roster?*

Deleting an employee from the roster should be a rare occurrence. If an ineligible employee appears on the preliminary roster, you may need to correct some data fields in PPS to ensure that employee does not appear on the final roster. If an ineligible employee still appears on the final roster, then it might be appropriate to delete the employee from the roster.

Otherwise eligible employees who are not receiving a merit increase (e.g., due to an unsatisfactory performance rating) *should remain on the roster* so that funds generated by their presence are left in the pool of available dollars. This is important for balancing the total amount spent against the overall control figure.

## **Web-Based Merit System Frequently Asked Questions**

### ***How do I handle an employee with a temporary reclassification or stipend?***

Only the permanent position can be merited during the web merit process, although both will appear on rosters. As long as the temporary reclassification or stipend shows up on a separate roster line, you'll be able to delete that temporary line from the roster without disrupting the permanent position (this is an example of an appropriate use of the delete function). Keep in mind that the two lines may appear on two different departments' rosters.

Later, follow your usual process on requesting rate increases for temporary reclassifications and stipends (if appropriate) – request control point approval, then contact HR Compensation with the approved request.

### ***What do I enter for the performance evaluation rating and date?***

Performance ratings are entered as 1, 2, 3, 4 or X.

1 = Demonstrates a high degree of expertise and mastery in all aspects of the position in a professional manner.

2 = Fully performs the entire range of duties in a professional manner.

3 = Generally performs essential duties satisfactorily.

4 = Does not perform essential duties in a satisfactory manner.

X = No written performance evaluation has been done.

Date format is MM/YY, and it cannot be later than the current month. If using "X" as a performance rating, enter the current month (MM/YY).

NOTE: Performance evaluations should take place sometime during the twelve months prior to the merit effective date.

### ***How do I get my own merit entered, if I'm the department preparer?***

Please make every effort to have someone else enter your merit rating and salary increase. "Someone else" can either be another preparer in your department, a department chair with an account, or a control point. If it is absolutely not possible for another person to enter it, then you may enter your own, but you should follow through with documentation to your control point. An example of documentation could be an email to the control point with a copy going to the department chair. Your control point may give you further instructions on this topic.

Note that all "self-updates" are marked with a flag in the system and will be reviewed at the end of the process.

### ***How do I handle an employee who is close to or at the salary range maximum?***

The system will allow you to merit an employee up to the range maximum only, so it may revise your original entry.

## **Web-Based Merit System Frequently Asked Questions**

### ***How do I handle an employee who is at the salary range minimum?***

The web-based merit system will allow employees to receive a below-range merit, even if they continue to be below the minimum after the merit is applied. If this occurs, it is very important to remember to bring the employee to the minimum of the range *after the web merit process is completed*. Use action code '33' (Manual Range Adjustment) when you process this action in PPS.

### ***How do I download my merit roster?***

At the bottom of the roster screen, click on "Select Download". Select the appropriate download and click on the "Go" button.

"Roster" and "Deletes" will be downloaded into Excel.

"Roster Pdf" will create a PDF file of the roster.