Merit Program Administration Instructions for Policy-Covered/Non-Represented Staff FY 2016/2017

Thursday, June 2 2016

TO: Campus Community

FR: Cynthia Señeriz, Director, Human Resources

RE: Merit Program Administration Instructions for Policy-Covered/Non-Represented Staff FY 2016/2017

The merit program for eligible non-represented staff will be implemented using the Web Merit system. The implementation process will be divided into three phases, but prior to the beginning of the Web Merit Process:

1. Ensure that Web Merit system access has been granted to the individual(s) who will be responsible for reviewing the preliminary and final rosters – even if you already have PPS access, please make sure you have access to your departments within Web Merit. This may require an update to your Request for Access to PPS form. Instructions on accessing the Web Merit system are available on the HR web site at http://www.hr.ucsb.edu/pps-uc-path/payrollpersonnel-system-pps(link is external) under the accordion file “Web-Based Merit System.”

2. Ensure that the distributions and appointments in PPS are current for eligible non-represented staff.

Phase 1: Preliminary ATB Roster Review (June 3, 2016 to June 9, 2016 at 3:00 p.m.)

1. A preliminary roster will be generated – the evening of June 2, 2016 - and released for department review on June 3, 2016.

2. The purpose of the preliminary roster is to allow departments and control points to review the roster for accuracy and completeness. If employees have been erroneously omitted or included with respect to the eligibility criteria, the reason for the omission must be identified and updates made in PPS. Corrections cannot be made in the Web Merit system.

3. Ensure that any recent UCSB employee who has transferred from another UC location with no break in service, and who meets the eligibility criteria, is identified for inclusion.

4. The preliminary roster will be available to view from June 3, 2016 through June 9, 2016 at 3:00 p.m. Updates in PPS during this time period will be reflected on the final roster. The final roster will be run the evening of June 9, 2016.

Phase 2: Final Roster Review and Input (June 10, 2016 through June 15, 2016 at 12:00 p.m.)

1. The final roster will be available for data input on June 10, 2016 through 12:00 p.m. on June 15, 2016. No corrections can be made to the final roster. Human Resources must be contacted if omissions are identified during this phase. The Web Merit system allows the roster to be downloaded in an Excel format for review outside the Web Merit system.

2. Enter the most recent performance evaluation rating for each eligible employee in your department. The table set forth below explains the performance evaluation ratings definitions and how they appear in Web Merit.

3. Enter the merit percentage for each employee and Web Merit auto calculates the new pay rate.

4. Freeze Period for PPS begins June 9, 2016 at 3:00 p.m. through Saturday, June 18, 2016 at 8:00 a.m.

5. Avoid updates in PPS that change the appointment or distribution lines for an employee receiving a merit increase.

6. For departments with multiple pages of the roster, please save all entries on each page prior to moving to the next.

7. Web Merit does not work with Internet Explorer 10 or higher. Please use Firefox or other browser for the Web Merit entry.

8. EDB Update (Evening of Friday, June 17, 2016).

Web Merit Rating

Web Merit Rating Definition

NEW Performance Evaluation Rating Definitions

http://www.hr.ucsb.edu/managers-supervisors/performance-evaluations(link is external) under “Useful Links – Performance Evaluation Form – Non-Represented Staff

OLD Performance Evaluation Rating Definitions http://www.hr.ucsb.edu/managers-supervisors/performance-evaluations(link is external) under “Useful Links – Performance Evaluation Form – Represented Staff

5

Fails to meet, unsatisfactory

Consistently below expectations

Does not perform essential duties in a satisfactory manner (4).

4

Partially meets, improvement needed

Improvement needed

N/A

3

Meets expectations, Satisfactory

Meets expectations

Generally performs essential duties satisfactorily (3).

2

Exceeds expectations, More than satisfactory

Exceeds expectations

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

1

Superior, Outstanding

Exceptional

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

X

No performance evaluation conducted

No performance evaluation conducted

No performance evaluation conducted

Phase 3: Verify Updates to the EDB and Salary Range Minimum (June 20, 2016)

1. Verify that the merit increase was updated correctly in the EDB for eligible non-represented staff. The salary range structure for PSS and MSP will be adjusted at the minimum and maximum by 2%. All salaries after the merit increase must be within range, i.e., no increase is to result in the final salary exceeding the range maximum and no salary is to fall below the range minimum.

2. The new salary range structure can be found under the “useful links” tab at http://www.hr.ucsb.edu/compensation/salary-scales(link is external). Employees who are excluded from the non-represented staff merit program may require a salary adjustment if the salary/pay rate falls below the new salary range minimum. The department is responsible for processing these pay adjustment using PPS action code 33.

3. The effective date of the new salary range minimums and maximums coincide with the effective date of the salary program pay increase:

· July 1, 2016 for monthly paid non-represented staff

· June 19, 2016 for biweekly paid non-represented staff

Balancing to the Merit Fund Pool

The merit fund pool will be calculated at 3% of the payroll base of career non-represented staff, on pay status or approved leave, as of May 2, 2016. Ineligible non-represented career staff will appear on the merit roster if hired between January 5 and May 2, 2016. In these instances, the Performance Rating should be entered as “X” (no performance evaluation conducted), an Evaluation Date entered as “07/16,” and a Percent Increase entered as “0” (zero). The sum of all salary increases must not exceed the merit fund pool.

Omissions from the Final Roster

Errors or omissions on the final roster that require the merit increase to be processed outside of the Web Merit system require consultation with Human Resources. Specific questions concerning the processing of the merit increase outside of the Web Merit system should be directed to Amy Arnold, Senior Human Resources Analyst (email at amy.arnold@hr.ucsb.edu(link sends e-mail) or phone extension 4068).

Performance Evaluation Audit

This year’s merit program will require the submission of completed performance evaluations for audit purposes. An electronic copy of the signed performance evaluation form for all career non-represented staff receiving a merit increase will need to be submitted via an email drop box using the following steps.

Send an email to: SMO-ucsbeval@ucsbadmindiv.onmicrosoft.com(link sends e-mail) (A secured site has been set up for HR to receive and store an electronic copy of the performance evaluations.)

· Attach a PDF copy of the signed performance evaluation to the email message

· Enter the DEPARTMENT NAME on the subject line

· Enter the EMPLOYEE NAME on the subject line

· If attaching multiple evaluation forms to a single email message, enter MULTIPLE on the subject line and list the employee names in the body of the email message

· The deadline for the submission of the signed evaluation forms is July 11, 2016

Additional Questions:

Please contact Amy Arnold, Senior Human Resources Analyst: extension 4068, or email at amy.arnold@hr.ucsb.edu(link sends e-mail)

Calendar:

Important Dates

Action

Comments

Thursday, 06/02/2016 - Evening

Run Preliminary Roster

Corrections in PPS can be made from Friday, June 3, 2016 up through 3 PM on Thursday, June 9, 2016 to be reflected on the final roster. No data entry in Web Merit.

Friday, 06/03/2016 to Thursday, 06/09/2016

Depts. review Preliminary Roster and make data corrections as needed in PPS

Thursday, 06/09/2016 3:00 p.m. to Saturday, 06/18/2016 8:00 a.m.

PPS FREEZE in effect.

Thursday, 06/09/2016 – Evening

Final Roster is generated

Friday, 06/10/2016 to Wednesday, 06/15/2016 at Noon

Depts. enter Performance evaluation ratings on Final Roster in Web Merit

Data entry in Web Merit NOT in PPS.

Action

Comments

Wednesday, 06/15/2016 12:30 p.m. to Friday, 06/17/2016 at 3:00 p.m.

Control Points review/edit Final Roster

Wednesday, 06/15/2016 12:30 p.m. to Friday, 06/17/2016 at 3:00 p.m.

HR reviews Final Roster

Friday, 06/17/2016 – Evening

Roster updates uploaded to PPS

Saturday, 06/18/2016 at 8:00 a.m.

FREEZE ends

Monday, 06/20/2016

Departments review and verify EDB Updates

Pay Date for BW paid eligible employees

Wednesday, July 13, 2016 (Pay Period June 19 through July 2, 2016)

Pay Date for MO paid eligible employees

Monday, August 1, 2016 (Pay Period July 1 through 31, 2016)

Monday, 7/11/2016

Due date to submit a PDF copy of the signed completed performance evaluation forms

Instructions contained in memo above

Mail List:

PPS-L