Merit Program Administration Instructions for Non-Represented (Policy-Covered) Staff (FY 2017-2018)

Friday, June 9 2017

TO: Campus Community

FR: Cynthia Señeriz, Director, Human Resources

RE: Merit Program Administration Instructions for Non-Represented (Policy-Covered) Staff (FY 2017-2018)

The Merit Program for eligible non-represented staff will be implemented using the Web Merit system. The implementation process will be divided into four 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 Merit Roster Review (Monday, June 12th to Monday, June 19th)

1. A preliminary roster will released for department review on Monday, June 12th and will remain open to view through Monday, June 19th.

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 to appointments and distributions cannot be made in the Web Merit system).

3. Updates in PPS during this time period will be reflected on the final merit roster.

4. 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.

Phase 2: Final Merit Roster Review and Input (Thursday, June 22nd through Friday, June 30th at Noon)

1. The Freeze Period for PPS begins Wednesday, June 21st at 3:00 p.m. through Saturday, July 1st at 8:00 a.m.

Avoid updates in PPS during the freeze period that would change the appointment or distribution lines for an employee receiving a merit increase.

2. The final roster will be available for:

· Departments’ review and input at 8am on Thursday, June 22nd through noon on Tuesday, June 27th.

· Control Points’ review and input from noon on Tuesday, June 27th through noon on Friday, June 30th.

3. No personnel data corrections can be made to the final merit roster in Web Merit.

4. The Web Merit system allows the roster to be downloaded in an Excel format for review outside the Web Merit system.

5. Enter the most recent performance evaluation rating for each eligible employee in your department. The table set forth below indicates the correct performance evaluation ratings and corresponding definitions to use versus the incorrect ratings and definitions that appear in Web Merit.

Performance Rating

UCSB Performance Evaluation Rating Definitions

Web Merit Rating Definitions

\*\*\* INCORRECT - DISREGARD \*\*\*

X

No performance evaluation conducted

No Performance Evaluation Conducted

1

Exceptional

Fails to Meet, Unsatisfactory

2

Exceeds Expectations

Partially meets, Improvement Needed

3

Fully Meets Expectations/Solid Performance

Meets Expectation, Satisfactory

4

Improvement needed

Exceeds expectations, More than Satisfactory

5

Consistently below expectations

Superior, Outstanding

6. Enter the merit percentage for each employee and Web Merit will auto calculate the new pay rate.

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

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

Phase 3: Verify Updates to the EDB (Monday, July 3rd)

1. The EDB update in PPS will be run the evening of Friday, June 30th.

2. On Monday, July 3rd, verify that the merit increase was updated correctly in the EDB for eligible non-represented staff.

Phase 4: Adjustments to Salaries that Fall Below the New Salary Range Minimum

1. The salary range structure for PSS and MSP will be adjusted at the minimum and maximum by 2.5%, effective July 1st for monthly paid and June 18th for bi-weekly paid.

2. All salaries after the merit increase must fall within the new salary range (e.g. no increase is to result in the final salary exceeding the range maximum and no salary is to fall below the range minimum).

3. Employees who are ineligible for a merit increase may require a salary adjustment if their salary/pay rate falls below the new salary range minimum. The department is responsible to process these pay adjustments (effective July 1st for monthly paid and June 18th for bi-weekly paid) using PPS action code 33.

4. The new salary range structure can be found under the “useful links” box on the HR/Compensation webpage at http://www.hr.ucsb.edu/compensation/salary-scales(link is external).

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 1, 2017. Ineligible non-represented career staff will appear on the merit roster if hired on or after January 4 and through May 1, 2017. In these instances, the Performance Rating should be entered as “X” (no performance evaluation conducted), an Evaluation Date entered as “06/17,” and a Percent Increase entered as “0” (zero). The sum of all salary increases must not exceed the merit fund pool. In addition to ensuring the sum of all salary increases do not exceed the merit fund pool, the 3% control figure for “Core” funds cannot be exceeded. The control figure for “Non-Core” funds can be exceeded, however this would require a decrease in the amount of Core funds to be used since the sum of all salary increases cannot exceed the 3% merit fund pool calculation.

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 (instructions are new and different from last year):

1. Scan each signed performance evaluation individually and save as a PDF with a unique document name that includes the LAST NAME, FIRST NAME, and DEPT CODE (e.g. “SMITH\_JOHN\_CHEM”)

2. Attach the PDF copy of the signed performance evaluation to an email message

3. Enter the DEPARTMENT NAME and EMPLOYEE NAME on the email subject line (e.g. “CHEM - JOHN SMITH”)

o If attaching multiple PDF documents to a single email message, enter “MULTIPLE” on the email subject line and list the employee names in the body of the email message

o PLEASE DO NOT SCAN MULTIPLE EVALUATIONS INTO ONE PDF DOCUMENT

4. Send your emails to: SMO-ucsbeval@ucsbconnect.onmicrosoft.com(link sends e-mail) (this is a secured site that has been set up for HR to receive and store electronic copies of the performance evaluations)

The deadline for the submission of the signed evaluation forms is Monday, July 31, 2017.

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

Monday, 06/12/2017 to Monday, 06/19/2017 at 3:00 p.m.

Departments review Preliminary Roster and make data corrections as needed in PPS

No data entry in Web Merit

Wednesday, 06/21/2017 3:00 p.m. to Saturday, 07/01/2017 8:00 a.m.

PPS FREEZE in effect

Thursday, 06/22/2017 to Tuesday, 06/27/2017 at noon

Final merit roster open to Departments to enter ratings and merit increases in Web Merit

Do not make changes in PPS for employees receiving a merit increase

Tuesday, 06/27/2017 at noon to Friday, 06/30/2017 at noon

Final merit roster open to Control Points to review and edit

Friday, 06/30/2017 at noon to Friday, 06/30/2017 at 3:00 p.m.

Final merit roster closes to departments and Control Points and opens for final HR review

Friday, 06/30/2017 – Evening

Roster updates uploaded to PPS

Saturday, 07/01/2017 at 8:00 a.m.

PPS FREEZE ends

Monday, 07/03/2017

Departments review and verify EDB Updates

Wednesday, 7/12/2017

Merit pay date for BW paid employees

Pay period is June 18 through July 1, 2017

Monday, 07/31/2017

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

Instructions contained in memo above

Tuesday, 8/1/2017

Merit pay date for MO paid employees

Pay period is July 1 through 31, 2017

Mail List:

PPS-L