



MERIT PROGRAM TRAINING

PART II

WEB MERIT USER INSTRUCTIONS

UCSB HUMAN RESOURCES - JULY 2018



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WEB MERIT BACKGROUND

THE WEB BASED MERIT ENTRY SYSTEM (A.K.A. "WEB MERIT") IS DESIGNED TO PROVIDE A FLEXIBLE, EASY TO USE ROSTER PROGRAM THAT GENERATES MERIT ROSTERS ACCORDING TO A SET OF CAMPUS ESTABLISHED CRITERIA. ACCESS TO THE WEB MERIT DATA FILES IS LIMITED TO AUTHORIZED USERS.

WEB MERIT STREAMLINES THE ADMINISTRATION OF MERITS BY:

- ELIMINATING THE CREATION OF MULTIPLE SPREADSHEETS
- INCREASING THE ACCURACY OF THE EMPLOYEE DATA
- AUTOMATING THE COMPENSATION PLANNING PROCESS
- STREAMLINING THE DATA SHARING BETWEEN DEPARTMENTS, CONTROL POINTS AND HUMAN RESOURCES



WEB MERIT ROLES

> WEB MERIT USERS ARE GRANTED ACCESS BASED ON THEIR PARTICULAR ROLE.

- **DEPARTMENT:** RESPONSIBLE FOR THE INPUT OF EMPLOYEE MERIT RECOMMENDATIONS AND PERFORMANCE RATINGS, AS PROVIDED BY THE DEPARTMENT HEAD. THESE INDIVIDUALS HAVE ACCESS TO DEPARTMENT ROSTERS AS ASSIGNED BY THE DEPARTMENT HEAD/ORGANIZATIONAL UNIT.
- CONTROL POINT: RESPONSIBLE FOR THE REVIEW AND APPROVAL OF ROSTERS SUBMITTED BY DEPARTMENTS WITHIN THE ORGANIZATIONAL UNIT. THESE INDIVIDUALS HAVE ACCESS TO ALL DEPARTMENTS WITHIN THE ORGANIZATIONAL UNIT/ACCOUNTABILITY STRUCTURE, AND WILL BE RESPONSIBLE FOR THE FINAL REVIEW AND APPROVAL OF ORGANIZATIONAL UNIT MERIT ROSTERS.

WEB MERIT ACCESS



> USERS MAY ACCESS WEB MERIT THROUGH HUMAN RESOURCE'S WEBSITE AT

HTTPS://WWW.HR.UCSB.EDU/PPS-UC-PATH/PAYROLLPERSONNEL-SYSTEM-PPS UNDER USEFUL

LINKS.





WEB MERIT ACCESS

PASSWORD, THE SYSTEM WILL DISPLAY THE PPS MAIN MENU.

University of California

Payroll/Personnel System

Main Menu

Employee Database (EDB) Inquiry

EDB Update System Application Help

New Hire

<u>Rehire</u>

Change Existing Employee Record

Separations

Leave of Absence

Intercampus Transfer

IDOC

Post Authorization Notification Functions

Inbox

Directory

Routing Option Selection

Notification Selection

Audit Review

Web Merit



WEB MERIT ACCESS

CLICK ON 'WEB MERIT' AT THE BOTTOM OF THE MAIN MENU AND YOU ARE PRESENTED WITH THE MERIT MENU PAGE. SELECT THE OPTION 'MERIT REVIEW/INPUT' TO ACCESS THE MERIT ROSTERS.

UNIVERSITY OF CALIFORNIA

T 2017 MERIT MENU

 Merit/Across the Board Administration
 Merit Review / Input Audit Past Cycles



WEB MERIT ROSTER/ PROCESSING STEPS

WEB MERIT ROSTER/PROCESSING STEPS:

- THE WEB MERIT PROCESS INVOLVES A SERIES OF STEPS/PHASES. THE CURRENT STATUS OF EACH MERIT CYCLE IS VISIBLE ON THE ROSTER CYCLE LIST. THE CYCLE STATUS CODES ARE LISTED BELOW.
 - U UNDER CONSTRUCTION
 - H PRELIMINARY MERIT ROSTER OPEN FOR HR AND CONTROL POINT REVIEW
 - D PRELIMINARY MERIT ROSTER OPEN FOR DEPARTMENT REVIEW
 - S FINAL ROSTER OPEN FOR HR & CONTROL POINT REVIEW
 - O FINAL ROSTER OPEN FOR DEPARTMENT INPUT
 - N CLOSED TO DEPARTMENT, OPEN TO CONTROL POINT ONLY
 - A FINAL ROSTER OPEN FOR HR REVIEW ONLY
 - R READY FOR EDB UPDATE



WEB MERIT ROSTERS

- DEPARTMENT AND CONTROL POINT USERS ACCESS MERIT ROSTERS BASED ON THE ACCOUNTABILITY STRUCTURE ESTABLISHED IN THE SECURITY TABLES.
- TO OPEN A MERIT ROSTER FROM THE MAIN MERIT ROSTER SELECTION PAGE, SELECT THE RADIO BUTTON AND CLICK ON 'OPEN ROSTER.'

				?		
0	EX 1STEP JULY 2014	EX	EX 1 STEP JULY 2014	Х	07/06/2014	07/01/2014
0	SX JULY 2014	SX	SX 1 STEP JULY 2014	Х	07/06/2014	07/01/2014
0	9 3 JULY 2014	EXT	99_3_GEN_SAL_INC_JULY_2014	Р	06/22/2014	07/01/2014
0	99 MERIT JULY 2018	EXT	99_MERIT_JULY_2018	U	07/01/2018	07/01/2018





WEB MERIT ROSTERS

DEPARTMENTS, ACCORDING TO HIS/HER ASSIGNED ACCESS RIGHTS. THE SCREEN SHOT BELOW DISPLAYS AN EXAMPLE FOR A DIVISION, WITH ALL OF THE DEPARTMENTS UNDER THE DIVISION LISTED. EACH DEPARTMENT REPRESENTS A MERIT ROSTER.

Roster Department Selection List Cycle ID: 99_MERIT_JULY_2018 Cycle Type: Merit - Open Range

Department No.	Department Name	Rule	Select
ASEN	ACADEMIC SENATE	MERITADM	This Dept Get All Down <u>Up</u>
ATHL	ATHLETICS	MERITADM	This Dept Get All Down <u>Up</u>
CHOF	CHANCELLORS OFFICE	MERITADM	This Dept Get All Down <u>Up</u>
EXVC	EXECUTIVE VICE CHANCELLOR	MERITADM	This Dept Get All <u>Down</u> <u>Up</u>
FARM	FINANCIAL&RESOURCE MANAGEMENT	MERITADM	This Dept Get All <u>Down</u> <u>Up</u>
GNCN	CHANCELLOR-GENERAL COUNSEL	MERITADM	This Dept Get All Down <u>Up</u>
MACR	MACROECONOMICS INSTITUTE	MERITADM	This Dept Get All Down <u>Up</u>
RESD	VICE CHANCELLOR OF RESEARCH	MERITADM	This Dept Get All <u>Down</u> <u>Up</u>
SACQ	STATEWIDE ACADEMIC COUNCIL	MERITADM	This Dept Get All Down <u>Up</u>
SFAC	STUDENT FEE ADVISORY COMMITTEE	MERITADM	This Dept Get All Down <u>Up</u>
VCAD	VICE CHANCLLR ADMIN SERVICES	MERITADM	This Dept Get All <u>Down</u> <u>Up</u>
VCIA	V/C INSTITUTIONAL ADVANCEMENT	MERITADM	This Dept Get All <u>Down</u> <u>Up</u>
VCST	VICE CHANCLLR STUDENT AFFAIRS	MERITADM	This Dept Get All <u>Down</u> <u>Up</u>
VETA	VETERANS AFFAIRS	MERITADM	This Dept Get All Down <u>Up</u>

Web Merit Rules:

Control Point Access = MERITCTL Department Access = MERITDPT

Based on the accountability structure, the user may drill down or navigate up using the links displayed. This example is for the Admin Services Division.



WEB MERIT ROSTERS (PRELIMINARY)

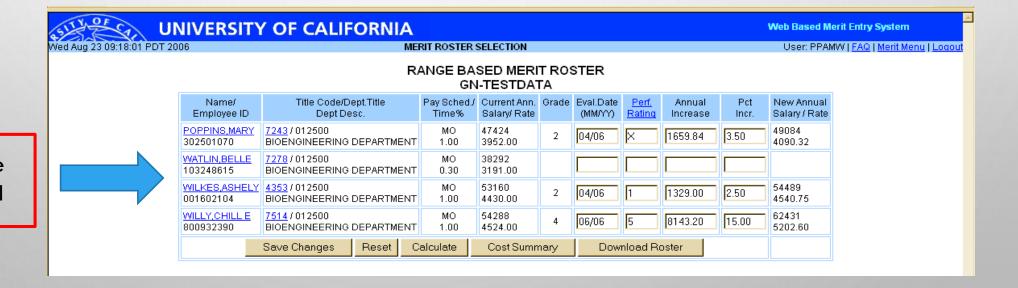
- TWO TYPES OF ROSTERS ARE GENERATED BY WEB MERIT: A PRELIMINARY ROSTER AND A FINAL ROSTER.
- THE PURPOSE OF THE PRELIMINARY ROSTER IS TO ALLOW DEPARTMENTS AND ORGANIZATIONAL UNITS TO REVIEW THE MERIT ROSTER FOR ACCURACY.
- > ERRORS FOUND ON THE WEB PRELIMINARY MERIT ROSTER SHOULD BE CORRECTED IN PPS.
- CORRECTIONS CANNOT BE MADE TO THE PRELIMINARY MERIT ROSTER IN WEB MERIT AND DATA CANNOT BE SAVED TO THE PRELIMINARY MERIT ROSTER DURING THIS PHASE.



Remember to save any and all updates from page to page! Otherwise you will lose your data entries.

FINAL MERIT ROSTER:

- ➤ ONCE THE MERIT CYCLE STATUS IS SET TO O (OPEN FOR DEPARTMENT INPUT), THE FINAL MERIT ROSTER IS AVAILABLE FOR DATA INPUT BY DEPARTMENT USERS.
- THE FINAL ROSTER DISPLAYS AN EMPLOYEE'S CURRENT TITLE, SALARY AND GRADE. APPOINTMENT AND DISTRIBUTION LINE PAY INFORMATION IS AVAILABLE BY SELECTING AN EMPLOYEE'S NAME ON THE ROSTER.



Click on an Employee name for more detail



FINAL MERIT ROSTER - EMPLOYEE DETAIL:

> SELECT AN EMPLOYEE'S NAME ON THE ROSTER, A DETAIL PAGE OPENS IN A NEW WINDOW DISPLAYING THE EMPLOYEE'S DISTRIBUTION DATA FOR THE SELECTED APPOINTMENT. DELETIONS AND COMMENTS ARE SAVED ON THIS PAGE.

RANGE BASED ROSTER EMPLOYEE DETAIL											
Employee ID : 800932390											
Name : WILLY,CHILL E											
Cycle : GN-TESTDATA											
Home Department Code : 012500 Next Merit Review Date : 10/06											
	Home Department			NGINEERING DEPA			it Review (2.		
	Most Recent Hire Da	ite :	09/15	/1997	F	robation	nary Perio	d End Date:	03/15/1998	3	
Appointment 30 BIOENGINEERING DEPARTMENT											
	Title Code	•	: 7	514	Title : MGf	MT SER	V OFF II - 8	BUPERVISOR	२		
			_	1/01/2004	TUC/Appt Rep : 99 /			_			
	Appointme						nedule: MC				
Dist#	FAU/Translation	DOS	Pct	Old Annual Salary / Old Rate	New Annual Salary / New Rate	% Incr.	Incr. Amount	Begin Date	End Date	Cost	FY Cos
31	44026102A 19900 1 ENGR/BIOENGR-OPER/ADMIN	REG	1.00	54288.00 4524.00	62431.20 5202.60	15.00	8143.20	10/01/2005	Indefinite	8143.20	6107.4
				,	Comments:						
	Г				comments.			_			
	L							lb2			
Save Comments Delete from Roster Close											



FROM THE EMPLOYEE DETAIL SCREEN, THE USER CAN ENTER COMMENTS FOR AN EMPLOYEE OR DELETE THE EMPLOYEE LINE FROM THE ROSTER IF IT HAS BEEN DETERMINED THAT THE EMPLOYEE OR THE SPECIFIC LINE IS NOT ELIGIBLE FOR A MERIT.

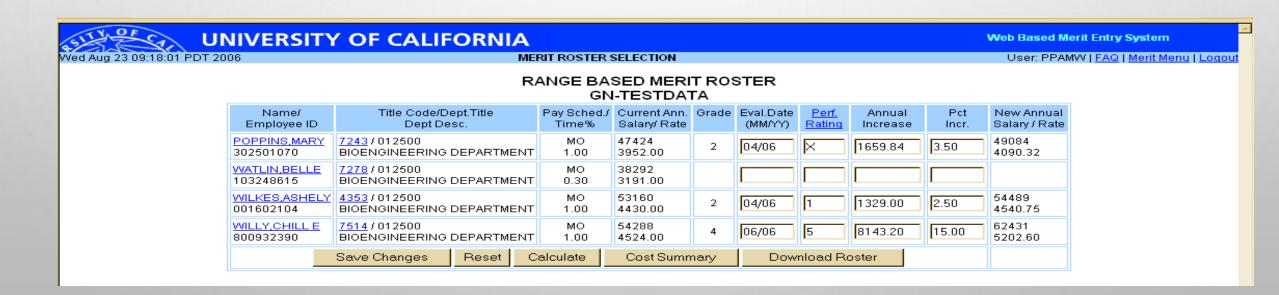
DELETED EMPLOYEES CANNOT BE RESTORED ON THE ROSTER. PLEASE CONTACT HR PRIOR TO DELETING EMPLOYEES TO CONFIRM INELIGIBILITY (AMY ARNOLD AT EXT. 4068 OR AMY.ARNOLD@hr.ucsb.edu).

PLEASE NOTE: ANY DISTRIBUTION LINES WITH A DOS CODE OTHER THAN REG (INCLUDING ERT, SAS, LNS, ETC.) WILL NOT BE EXCLUDED. THESE DISTRIBUTION LINES AND OTHERS THAT DO NOT REFLECT BASE PAY MUST BE DELETED.



FINAL MERIT ROSTER:

FOR EACH MERIT ELIGIBLE EMPLOYEE THE PERFORMANCE RATING AND APPRAISAL DATE MUST BE ENTERED ON THE FINAL MERIT ROSTER. THE AMOUNT OF THE MERIT INCREASE OR THE PERCENT INCREASE MUST BE ENTERED. ONCE THE ENTRIES ARE MADE, SELECT "SAVE CHANGES".





FINAL MERIT ROSTER:

Within the Final Merit roster, the link to "Perf Rating" in the header will display system-generated choices for the performance evaluation codes. Ignore these codes and descriptions, and use the chart below.

Web Merit Standard Performance Rating Chart

Standard Deficition	Std Perf Rating	Acceptable Range Increase MIN - MAX	Required or Recommended
XNo Performance Evaluation Conducted	Х	8.00 - 6.00	Recommended ▼
1 Fails to Meet, Unsatisfactory	X	0.00 - 6.00	Recommended ▼
2Partially Meets, Improvement Needed	2	0.00 - 6.00	Recommended ▼
3Meets Expectation, Satisfactory	3	0.00 - 6.00	Recommended •
4Exceeds Experiations, More than Satisfactory	4	0.00 - 6.00	Recommended •
5Superior, Outstanding	5	0.00 - 6.00	Recommended •

UCSB PERFORMANCE RATING CHART

UCSB's Performance Evaluation Ratings Definitions	Rating
No Performance Evaluation Conducted	х
Exceptional	1
Exceeds Expectations	2
Fully Meets Expectations/Solid Performance	3
Improvement Needed	4
Consistently Below Expectations	5



FINAL MERIT ROSTER:

THE SYSTEM WILL WARN THE USER IF A SALARY INCREASE THAT WAS ENTERED RESULTED IN A SALARY RATE ABOVE THE ESTABLISHED MAXIMUM FOR THE TITLE CODE. THE SYSTEM WILL DISPLAY THE MESSAGE: "ROM: NEW RATE HAS BEEN SET ABOVE THE MAXIMUM FOR THE TITLE CODE."

> THE TITLE CODE ALSO PROVIDES A LINK TO SALARY RANGE INFORMATION.

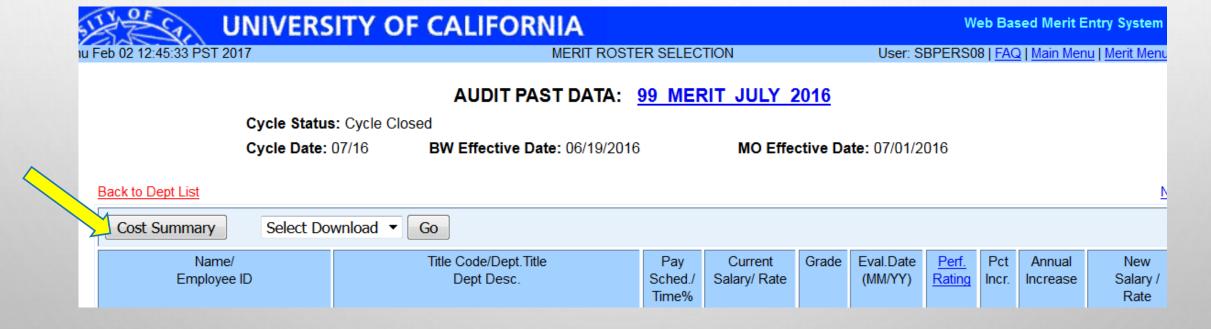
Title Code: 7235 ANL 2
Sublocation: Rep Code: U
Grade: 2 Effective: 07/01/2016
Cycle Date: 07/16

Minimum Midpoint Maximum
0046551.00 0065152.00 0083753.00

Close



WEB MERIT COST SUMMARY





COST SUMMARY

- THE COST SUMMARY CALCULATES THE CURRENT AND NEW SALARY BASE AND THE ANNUAL COST.
- THE COST SUMMARY REPORTS WHETHER THE ROSTER IS OVER OR UNDER THE CONTROL PERCENT AND BY WHAT DOLLAR AMOUNT.
- THE COST SUMMARY ALSO CALCULATES THE FISCAL YEAR COST CALCULATED BY THE NUMBER OF MONTHS FROM THE MERIT EFFECTIVE DATE TO JUNE 30.



COST SUMMARY

WHEN REVIEWING THE COSTING REPORT PROVIDED BY WEB MERIT, MERITCTL AND MERITDPT WEB MERIT USERS SEE:

C	Costing Summary for selected Roster of Cycle : 99_MERIT_JULY_2016 Department									
Control Percent=3.00										
Fund Source	Current Salary Base	Merit Allocation	New Salary Base	Annual Cost	Under Over	Annual Cost%	Fiscal Cost			
Centrally Funded	8,622,320	258,669	8,880,890	258,570	99	3.00	258,571			
SUB-TOTAL	8,622,320	258,669	8,880,890	258,570	99	3.00	258,571			
Department Funded	19,065,304	571,959	19,635,193	569,888	2,070	2.99	569,890			
SUB-TOTAL	19,065,304	571,959	19,635,193	569,888	2,070	2.99	569,890			
GRAND TOTAL	27,687,625	830,628	28,516,084	828,459	2,169	2.99	828,462			
	Close Refresh									

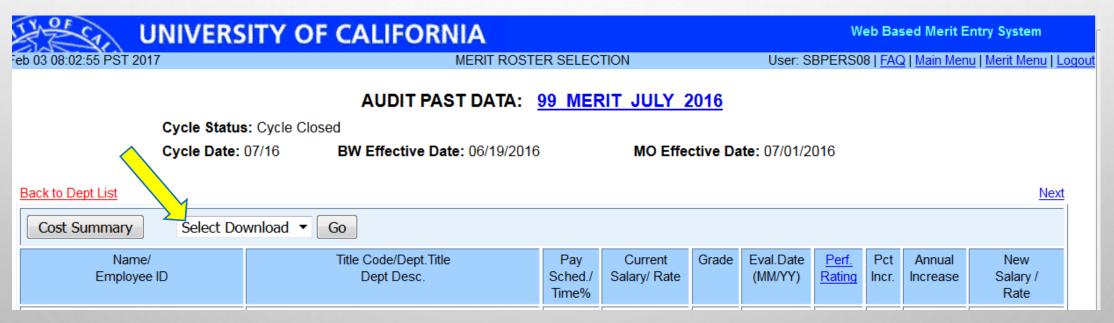


COST SUMMARY

- THE COST SUMMARY WILL NOT CALCULATE CORRECTLY IF AN EMPLOYEE LINE CONTAINS A RNF (RATE NOT FOUND) ERROR. THE EMPLOYEE LINE MUST BE CLEARED, CHANGES SAVED, AND THE CALCULATE BUTTON CLICKED AGAIN.
- FROM THE FINAL MERIT ROSTER. CONTACT AMY ARNOLD IN HUMAN RESOURCES BEFORE PROCESSING THE MERIT OUTSIDE OF WEB MERIT.
- THE COST SUMMARY REFLECTS AN OVER SPENT MERIT ALLOCATION WITH A (-) NEGATIVE FIGURE, AND AN UNDER SPENT MERIT ALLOCATION WITH A POSITIVE FIGURE.
- THE COST SUMMARY WILL NOT UPDATE UNTIL THE CHANGES MADE TO THE MERIT ROSTER HAVE BEEN SAVED.



REPORTS AND APPROVALS





REPORTS AND APPROVALS

- > THE WEB MERIT USER HAS THE OPTION TO EXPORT THE FOLLOWING REPORTS:
 - EMPLOYEE ROSTER (EXPORT TO EXCEL OR PDF)
 - EMPLOYEE DELETES (EXPORT TO EXCEL)
- > STEPS TO EXPORT THE DATA:
 - FROM THE ROSTER SCREEN CLICK ON "SELECT DOWNLOAD" THEN SELECT ROSTER, DELETES, OR ROSTER PDF. SELECT "GO." THE DATA WILL BE AUTOMATICALLY EXPORTED TO EXCEL OR PDF.

ary	Select Download ▼	Go							
Name/ imployee ID	Roster Deletes	Title Code/Dept.Title Dept Desc.	Pay Sched./ Time%	Current Salary/ Rate	Curr. Step	Eval.Date (MM/YY)	Perf. Rating	Recomm. Incr.	2 4
<u>INA</u>	Roster Pdf	/ D01030	MO	55440					



REPORTS AND APPROVALS

DEPARTMENTS:

- DOWNLOAD THE MERIT DATA FROM THE "FINAL MERIT ROSTER" AND THE "COST SUMMARY" INTO AN EXCEL WORKSHEET TO MAINTAIN A HARD COPY RECORD OF THE MERIT RECOMMENDATIONS FOR THE DEPARTMENT.
- ACCESS TO THE WEB MERIT SYSTEM WILL BE DISABLED ONCE THE MERIT PROCESS IS COMPLETED.
- FOLLOW THE INSTRUCTIONS PROVIDED BY YOUR CONTROL POINT CONCERNING APPROVALS AND SUBMISSION OF THE MERIT RECOMMENDATIONS.

> CONTROL POINTS:

REVIEW, FINALIZE, OBTAIN APPROVALS FROM DEANS OR VICE CHANCELLORS, ETC., AND SUBMIT TO SANDRA PEREZ IN THE BUDGET & PLANNING OFFICE.



TIPS & TRICKS

- DO NOT USE THE BACK ARROW BUTTON TO NAVIGATE WITHIN THE "FINAL MERIT ROSTER".

 THE BACK ARROW BUTTON WILL UNDO YOUR CHANGES. SELECT THE "BACK TO DEPT" LINK WITHIN THE MERIT ROSTER TO RETURN TO THE DEPARTMENT LIST.
- SAVE EACH ROSTER PAGE AS YOU MOVE THROUGH YOUR DEPARTMENT'S ROSTER ENTERING MERIT INFORMATION. IF YOU DON'T SAVE EACH PAGE, ONCE YOU MOVE TO THE NEXT PAGE ALL OF YOUR DATA WILL BE LOST.
- THE "RESET" BUTTON WILL CLEAR ALL DATA ENTERED ON THE MERIT ROSTER, ONLY IF THE DATA HAS NOT YET BEEN SAVED OR THE "CALCULATE" BUTTON HAS NOT YET BEEN SELECTED.



QUESTIONS?

> HUMAN RESOURCES

- > KATHY MOORE -- EXT. 7137 OR KATHY.MOORE@HR.UCSB.EDU
 - > GENERAL MERIT PROGRAM QUESTIONS
- > AMY ARNOLD -- EXT. 4068 OR AMY.ARNOLD@HR.UCSB.EDU
 - > GENERAL MERIT PROGRAM AND/OR WEB MERIT QUESTIONS

> BUDGET & PLANNING

- > SANDRA PEREZ -- EXT. 4052 OR SANDRA.PEREZ@UCSB.EDU
 - > FUNDING QUESTIONS