



# 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](https://www.hr.ucsb.edu/pps-uc-path/payrollpersonnel-system-pps) UNDER USEFUL LINKS.

The screenshot displays the Human Resources website interface. At the top, there is a navigation bar with links for Memos, Forms, FAQs, Policies, and a search box. Below this is a secondary navigation bar with categories like PROSPECTIVE EMPLOYEES, NEW EMPLOYEES, CURRENT EMPLOYEES, MANAGERS+SUPERVISORS, and RETIREES. The main content area is titled "PPS + UC PATH" and "PAYROLL/PERSONNEL SYSTEM (PPS)". It includes a description of the system and a list of links: "PPS System Access and Training", "PPS Data Clean-up and Conversion", and "PPS Best Practices". There is also a section for "PPS Tools and Resources" with links for "Flat Rate Pay - PPS Instructions (BYA and BYH)" and "ERIT (Employee Reduction in Time) - PPS Instructions". On the right side, a "Useful Links" section is highlighted with a red circle, containing links such as "Information regarding the Revised 2018 Bi-Weekly Calendar At-a-Calendar", "2018 Bi-Weekly Pay Calendar At-a-Glance (REVISED)", "Monthly Working Hours 2018", "Leave Accruals Chart 2018", "PPS Request for Access Form", "PPS Help Directory", "Payroll Unit in Accounting", and "Web Based PPS Logon" (also highlighted with a red circle).

Human Resources

Memos Forms FAQs Policies Search this site

ADMINISTRATIVE SERVICES UCSB

PROSPECTIVE EMPLOYEES NEW EMPLOYEES CURRENT EMPLOYEES MANAGERS+SUPERVISORS RETIREES

ASAP BENEFITS COMPENSATION LEAVE OF ABSENCE EMPLOYEE SERVICES EMPLOYMENT LABOR RELATIONS PPS + UC PATH TRAINING

Welcome

Payroll/Personnel System (PPS)

UCPath

Forms

FAQs

Contacts

## PPS + UC PATH

### PAYROLL/PERSONNEL SYSTEM (PPS)

The Payroll/Personnel System (PPS) supports the payroll and personnel requirements of the University. It is comprised of several databases that maintain current and historical information about University employees.

- PPS System Access and Training
- PPS Data Clean-up and Conversion
- PPS Best Practices

### PPS Tools and Resources

- Flat Rate Pay - PPS Instructions (BYA and BYH)
- ERIT (Employee Reduction in Time) - PPS Instructions

### Useful Links

- Information regarding the Revised 2018 Bi-Weekly Calendar At-a-Calendar
- 2018 Bi-Weekly Pay Calendar At-a-Glance (REVISED)
- Monthly Working Hours 2018
- Leave Accruals Chart 2018
- PPS Request for Access Form
- PPS Help Directory
- Payroll Unit in Accounting
- Web Based PPS Logon





# WEB MERIT ACCESS

- ONCE YOU LOG IN TO THE WEB BASED VERSION OF PPS USING YOUR PPS USER NAME AND 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](#)
- [Rehire](#)
- [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.

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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.'

MERIT ROSTER SELECTION

**Roster Cycle List**

Select	CycleID	CBUC	Description	Status ?	BW Effect Date	MO Effect Date
<input type="radio"/>	<a href="#">EX 1STEP JULY 2014</a>	EX	EX 1 STEP JULY 2014	X	07/06/2014	07/01/2014
<input type="radio"/>	<a href="#">SX JULY 2014</a>	SX	SX 1 STEP JULY 2014	X	07/06/2014	07/01/2014
<input type="radio"/>	<a href="#">9 3 JULY 2014</a>	EXT	99_3_GEN_SAL_INC_JULY_2014	P	06/22/2014	07/01/2014
<input type="radio"/>	<a href="#">99 MERIT JULY 2018</a>	EXT	99_MERIT_JULY_2018	U	07/01/2018	07/01/2018

Open Roster





# WEB MERIT ROSTERS

- UPON OPENING THE MERIT ROSTER, THE USER IS PRESENTED WITH ONE OR MORE 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   <a href="#">Up</a>
ATHL	ATHLETICS	MERITADM	This Dept   Get All   Down   <a href="#">Up</a>
CHOF	CHANCELLORS OFFICE	MERITADM	This Dept   Get All   Down   <a href="#">Up</a>
EXVC	EXECUTIVE VICE CHANCELLOR	MERITADM	This Dept   Get All   <a href="#">Down</a>   <a href="#">Up</a>
FARM	FINANCIAL&RESOURCE MANAGEMENT	MERITADM	This Dept   Get All   <a href="#">Down</a>   <a href="#">Up</a>
GNCN	CHANCELLOR-GENERAL COUNSEL	MERITADM	This Dept   Get All   Down   <a href="#">Up</a>
MACR	MACROECONOMICS INSTITUTE	MERITADM	This Dept   Get All   Down   <a href="#">Up</a>
RESO	VICE CHANCELLOR OF RESEARCH	MERITADM	This Dept   Get All   <a href="#">Down</a>   <a href="#">Up</a>
SACQ	STATEWIDE ACADEMIC COUNCIL	MERITADM	This Dept   Get All   Down   <a href="#">Up</a>
SFAC	STUDENT FEE ADVISORY COMMITTEE	MERITADM	This Dept   Get All   Down   <a href="#">Up</a>
VCAD	VICE CHANCLLR ADMIN SERVICES	MERITADM	This Dept   Get All   <a href="#">Down</a>   <a href="#">Up</a>
VCIA	V/C INSTITUTIONAL ADVANCEMENT	MERITADM	This Dept   Get All   <a href="#">Down</a>   <a href="#">Up</a>
VCST	VICE CHANCLLR STUDENT AFFAIRS	MERITADM	This Dept   Get All   <a href="#">Down</a>   <a href="#">Up</a>
VETA	VETERANS AFFAIRS	MERITADM	This Dept   Get All   Down   <a href="#">Up</a>

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.**



# WEB MERIT ROSTERS (FINAL)

*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.

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Wed Aug 23 09:18:01 PDT 2006

Web Based Merit Entry System

USER: PPAMW | [FAQ](#) | [Merit Menu](#) | [Logout](#)

MERIT ROSTER SELECTION

RANGE BASED MERIT ROSTER  
GN-TESTDATA

Name/ Employee ID	Title Code/Dept.Title Dept Desc.	Pay Sched./ Time%	Current Ann. Salary/ Rate	Grade	Eval.Date (MM/YY)	Perf. Rating	Annual Increase	Pct Incr.	New Annual Salary / Rate
<a href="#">POPPINS,MARY</a> 302501070	7243 / 012500 BIOENGINEERING DEPARTMENT	MO 1.00	47424 3952.00	2	04/06	X	1659.84	3.50	49084 4090.32
<a href="#">WATLIN,BELLE</a> 103248615	7278 / 012500 BIOENGINEERING DEPARTMENT	MO 0.30	38292 3191.00						
<a href="#">WILKES,ASHELY</a> 001602104	4353 / 012500 BIOENGINEERING DEPARTMENT	MO 1.00	53160 4430.00	2	04/06	1	1329.00	2.50	54489 4540.75
<a href="#">WILLY,CHILLE</a> 800932390	7514 / 012500 BIOENGINEERING DEPARTMENT	MO 1.00	54288 4524.00	4	06/06	5	8143.20	15.00	62431 5202.80

Save Changes

Reset

Calculate

Cost Summary

Download Roster

Click on an Employee  
name for more detail





# WEB MERIT ROSTERS (FINAL)

## 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  
Home Department : BIOENGINEERING DEPARTMENT  
Most Recent Hire Date : 09/15/1997  
Next Merit Review Date : 10/06  
Next Merit Review Code : 2.  
Probationary Period End Date : 03/15/1998

#### Appointment 30 BIOENGINEERING DEPARTMENT

Title Code : 7514  
Title : MGMT SERV OFF II - SUPERVISOR  
Appointment Begin : 01/01/2004  
Appointment End : Indefinite  
TUC/Appt Rep : 99 / S  
Rate Code : A Pay Schedule: MO

Dist#	FAU/Translation	DOS	Pct	Old Annual Salary / Old Rate	New Annual Salary / New Rate	% Incr.	Incr. Amount	Begin Date	End Date	Cost	FY Cost
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	6107.40

Comments:

Save Comments

Delete from Roster

Close





# WEB MERIT ROSTERS (FINAL)


- 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](mailto: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.



# WEB MERIT ROSTERS (FINAL)

## 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**”.


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Web Based Merit Entry System

Wed Aug 23 09:18:01 PDT 2006
MERIT ROSTER SELECTION
User: PPAMW | [FAQ](#) | [Merit Menu](#) | [Logout](#)

### RANGE BASED MERIT ROSTER GN-TESTDATA

Name/ Employee ID	Title Code/Dept.Title Dept Desc.	Pay Sched./ Time%	Current Ann. Salary/ Rate	Grade	Eval.Date (MM/YY)	Perf. Rating	Annual Increase	Pct Incr.	New Annual Salary / Rate
<a href="#">POPPINS,MARY</a> 302501070	<a href="#">7243</a> / 012500 BIOENGINEERING DEPARTMENT	MO 1.00	47424 3952.00	2	04/06	X	1659.84	3.50	49084 4090.32
<a href="#">WATLIN,BELLE</a> 103248615	<a href="#">7278</a> / 012500 BIOENGINEERING DEPARTMENT	MO 0.30	38292 3191.00						
<a href="#">WILKES,ASHELY</a> 001602104	<a href="#">4353</a> / 012500 BIOENGINEERING DEPARTMENT	MO 1.00	53160 4430.00	2	04/06	1	1329.00	2.50	54489 4540.75
<a href="#">WILLY,CHILLE</a> 800932390	<a href="#">7514</a> / 012500 BIOENGINEERING DEPARTMENT	MO 1.00	54288 4524.00	4	06/06	5	8143.20	15.00	62431 5202.60

Save Changes
Reset
Calculate
Cost Summary
Download Roster



# WEB MERIT ROSTERS (FINAL)

## 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 Definition	Std Perf Rating	Acceptable Range Increase MIN - MAX	Required or Recommended
X No Performance Evaluation Conducted	X	0.00 - 6.00	Recommended ▼
1 Fails to Meet, Unsatisfactory	1	0.00 - 6.00	Recommended ▼
2 Partially Meets, Improvement Needed	2	0.00 - 6.00	Recommended ▼
3 Meets Expectation, Satisfactory	3	0.00 - 6.00	Recommended ▼
4 Exceeds Expectations, More than Satisfactory	4	0.00 - 6.00	Recommended ▼
5 Superior, Outstanding	5	0.00 - 6.00	Recommended ▼

### UCSB PERFORMANCE RATING CHART

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



# WEB MERIT ROSTERS (FINAL)

## 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


**UNIVERSITY OF CALIFORNIA**
Web Based Merit Entry System

Feb 02 12:45:33 PST 2017
MERIT ROSTER SELECTION
User: SBPERS08 | [FAQ](#) | [Main Menu](#) | [Merit Menu](#)

**AUDIT PAST DATA:** [99 MERIT JULY 2016](#)

**Cycle Status:** Cycle Closed  
**Cycle Date:** 07/16      **BW Effective Date:** 06/19/2016      **MO Effective Date:** 07/01/2016

[Back to Dept List](#)

Name/ Employee ID	Title Code/Dept.Title Dept Desc.	Pay Sched./ Time%	Current Salary/ Rate	Grade	Eval.Date (MM/YY)	<a href="#">Perf. Rating</a>	Pct Incr.	Annual Increase	New Salary / Rate
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# 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:

Costing Summary for selected Roster of Cycle : 99_MERIT_JULY_2016							
Department <input type="text" value=""/>							
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
<b>SUB-TOTAL</b>	<b>8,622,320</b>	<b>258,669</b>	<b>8,880,890</b>	<b>258,570</b>	<b>99</b>	<b>3.00</b>	<b>258,571</b>
Department Funded	19,065,304	571,959	19,635,193	569,888	2,070	2.99	569,890
<b>SUB-TOTAL</b>	<b>19,065,304</b>	<b>571,959</b>	<b>19,635,193</b>	<b>569,888</b>	<b>2,070</b>	<b>2.99</b>	<b>569,890</b>
<b>GRAND TOTAL</b>	<b>27,687,625</b>	<b>830,628</b>	<b>28,516,084</b>	<b>828,459</b>	<b>2,169</b>	<b>2.99</b>	<b>828,462</b>




# 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.
- RNF (RATE NOT FOUND) ERRORS CANNOT BE CORRECTED. THE EMPLOYEE LINE SHOULD BE DELETED 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


**UNIVERSITY OF CALIFORNIA**
Web Based Merit Entry System

Feb 03 08:02:55 PST 2017
MERIT ROSTER SELECTION
User: SBPERS08 | [FAQ](#) | [Main Menu](#) | [Merit Menu](#) | [Logout](#)

**AUDIT PAST DATA: [99 MERIT JULY 2016](#)**

**Cycle Status:** Cycle Closed  
**Cycle Date:** 07/16      **BW Effective Date:** 06/19/2016      **MO Effective Date:** 07/01/2016

[Back to Dept List](#)
[Next](#)

Name/ Employee ID	Title Code/Dept.Title Dept Desc.	Pay Sched./ Time%	Current Salary/ Rate	Grade	Eval.Date (MM/YY)	<a href="#">Perf. Rating</a>	Pct Incr.	Annual Increase	New Salary / Rate
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# 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/ Employee ID	Select Download	Title Code/Dept.Title Dept Desc.	Pay Sched./ Time%	Current Salary/ Rate	Curr. Step	Eval.Date (MM/YY)	<a href="#">Perf. Rating</a>	Recomm. Incr.	M S
UNA	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](mailto:KATHY.MOORE@HR.UCSB.EDU)

➤ GENERAL MERIT PROGRAM QUESTIONS

➤ AMY ARNOLD -- EXT. 4068 OR [AMY.ARNOLD@HR.UCSB.EDU](mailto:AMY.ARNOLD@HR.UCSB.EDU)

➤ GENERAL MERIT PROGRAM AND/OR WEB MERIT QUESTIONS

## ➤ BUDGET & PLANNING

➤ SANDRA PEREZ -- EXT. 4052 OR [SANDRA.PEREZ@UCSB.EDU](mailto:SANDRA.PEREZ@UCSB.EDU)

➤ FUNDING QUESTIONS