

PPS Preparers and Reviewers:

The memo below is being sent to the PPS listserv. Thank you for serving as one of the representatives for your department to receive this memo. Please distribute this message to the colleagues in your department.

Thank you.

\*\*\*\*\*PLEASE GIVE WIDEST DISTRIBUTION\*\*\*\*\*

July 31, 2018

TO: Campus Community

FR: Cynthia Señeriz, Director, Human Resources

**RE: Merit Program Administration Instructions for Non-Represented (Policy-Covered) Staff (FY 2018-19)**

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, as well as training on how to use Web Merits, are available on the HR web site at <https://www.hr.ucsb.edu/pps-uc-path/payrollpersonnel-system-pps> 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 (Tuesday, July 31<sup>st</sup> to Friday, August 3<sup>rd</sup> at noon)**

1. A preliminary roster will be released for department review on **Tuesday, July 31<sup>st</sup> and will remain open to view through Friday, August 3<sup>rd</sup> at noon.**
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 (Monday, August 6<sup>th</sup> through Friday, August 10<sup>th</sup> at Noon)**

1. The Freeze Period for PPS begins Friday, August 3<sup>rd</sup> at noon through Saturday, August 11<sup>th</sup> 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 Monday, August 6<sup>th</sup> through noon on Wednesday, August 8<sup>th</sup>.**
  - **Control Points' review and input from noon on Wednesday, August 8<sup>th</sup> through noon on Friday, August 10<sup>th</sup>.**
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.

<b>Performance Rating</b>	<b>UCSB Performance Evaluation Rating Definitions</b>	<b>Web Merit Rating Definitions *** INCORRECT - DISREGARD ***</b>
X	No performance evaluation conducted	<del>No Performance Evaluation Conducted</del>
1	Exceptional	<del>Fails to Meet, Unsatisfactory</del>
2	Exceeds Expectations	<del>Partially meets, Improvement Needed</del>
3	Fully Meets Expectations/Solid Performance	<del>Meets Expectation, Satisfactory</del>
4	Improvement needed	<del>Exceeds expectations, More than Satisfactory</del>
5	Consistently below expectations	<del>Superior, Outstanding</del>

6. Enter the merit percentage for each employee and Web Merit will auto calculate the new pay rate.
7. 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).
8. The Career Tracks Salary Grade Ranges (effective May 1, 2018) can be found on the HR/Compensation webpage at <https://www.hr.ucsb.edu/compensation/salary-scales>, under the "Useful Links" box.
9. For departments with multiple pages of the roster, please save all entries on each page prior to moving to the next page.
10. Web Merit does not work with Internet Explorer 10 or higher. Please use Firefox, Chrome or another browser for the Web Merit entry.

### **Phase 3: Verify Updates to the EDB (Monday, August 13th)**

1. The EDB update in PPS will be run the evening of **Friday, August 10<sup>th</sup>**.
2. **On Monday, August 13th**, verify that the merit increase was updated correctly in the EDB for eligible non-represented staff.

### **Balancing to the Merit Fund Pool**

The merit fund pool will be calculated at 3% of the payroll base of eligible career non-represented staff, on pay status or approved leave, as of July 1, 2018. 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](mailto:amy.arnold@hr.ucsb.edu) 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:

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”)
  - 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
  - **PLEASE DO NOT SCAN MULTIPLE EVALUATIONS INTO ONE PDF DOCUMENT**
4. Send your emails to: [SMO-ucsbeval@ucsbconnect.onmicrosoft.com](mailto:SMO-ucsbeval@ucsbconnect.onmicrosoft.com) (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 Friday, August 31, 2018.

### Additional Questions:

Please contact Amy Arnold, Senior Human Resources Analyst: extension 4068, or email at [amy.arnold@hr.ucsb.edu](mailto:amy.arnold@hr.ucsb.edu).

### Calendar:

Important Dates	Action	Comments
Tuesday, 7/31/2018 to Friday, 8/3/2018 at noon	Departments review Preliminary Roster and make data corrections as needed <b>in PPS</b>	No data entry in Web Merit
Friday, 8/3/2018 at noon to Saturday, 8/11/2018 8:00 a.m.	<b>PPS FREEZE</b> in effect	

Monday, 8/6/2018 to Wednesday, 8/8/2018 at noon	Final merit roster open to Departments to enter ratings and merit increases <b>in Web Merit</b>	Do not make changes in PPS for employees receiving a merit increase
Wednesday, 8/8/2018 at noon to Friday, 8/10/2018 at noon	Final merit roster open to Control Points to review and edit	
Friday, 8/10/2018 at noon to Friday, 8/10/2018 at 3:00 p.m.	Final merit roster closes to departments and Control Points and opens for final HR review	
Friday, 8/10/2018 – Evening	Roster updates uploaded to PPS	
Saturday, 8/11/2018 at 8:00 a.m.	PPS <b>FREEZE</b> ends	
Monday, 8/13/2018	Departments review and verify EDB Updates	
Wednesday, 8/22/2018	<b>Merit pay date for BW paid employees</b>	Retroactive pay period is July 1 through July 28, 2018.
Friday, 8/31/2018	Due date to submit a PDF copy of the signed completed performance evaluation forms	Instructions contained in memo above
Friday, 8/31/2018	<b>Merit pay date for MO paid employees</b>	Retroactive pay period is July 1 through July 31, 2018