TABLE OF CONTENTS

- WEB MERIT BACKGROUND
- WEB MERIT ROLES
- WEB MERIT ACCESS
- WEB MERIT ROSTERS
- WEB MERIT COST SUMMARY
- WEB MERIT REPORTS & APPROVALS
- WEB MERIT TIPS AND TRICKS
- QUESTIONS & CONTACTS
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

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.
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.
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.’
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.

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.
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.

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

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.

![Image of Roster Details]

**RANGE BASED ROSTER EMPLOYEE DETAIL**

- **Employee ID**: 800932390
- **Name**: WILLY, CHILL E
- **Cycle**: ON-TEST DATA

**Home Department Code**: 012500
**Next Merit Review Date**: 10/06
**Home Department**: BIOENGINEERING DEPARTMENT
**Next Merit Review Code**: 2
**Most Recent Hire Date**: 09/15/1997
**Probationary Period End Date**: 03/15/1999

**Appointment 30 BIOENGINEERING DEPARTMENT**

<table>
<thead>
<tr>
<th>Dist#</th>
<th>FAU/Translation</th>
<th>DOS</th>
<th>Pct</th>
<th>Old Annual Salary</th>
<th>Old Rate</th>
<th>New Annual Salary</th>
<th>New Rate</th>
<th>% Incr</th>
<th>Incr. Amount</th>
<th>Begin Date</th>
<th>End Date</th>
<th>Cost</th>
<th>FY Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>31</td>
<td>44025102A 199001</td>
<td>REG</td>
<td>1.00</td>
<td>54288.00</td>
<td>4524.00</td>
<td>62431.20</td>
<td>5202.60</td>
<td>15.00</td>
<td>8143.20</td>
<td>10/01/2005</td>
<td>Indefinite</td>
<td>8143.20</td>
<td>6107.40</td>
</tr>
</tbody>
</table>
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).

- 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".
**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 ROSTERS (FINAL)

FINAL MERIT ROSTER:


➢ 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

<table>
<thead>
<tr>
<th>Minimum</th>
<th>Midpoint</th>
<th>Maximum</th>
</tr>
</thead>
<tbody>
<tr>
<td>0046551.00</td>
<td>0065152.00</td>
<td>0083753.00</td>
</tr>
</tbody>
</table>

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:

```
<table>
<thead>
<tr>
<th>Fund Source</th>
<th>Current Salary Base</th>
<th>Merit Allocation</th>
<th>New Salary Base</th>
<th>Annual Cost</th>
<th>Under Over</th>
<th>Annual Cost%</th>
<th>Fiscal Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>Centrally Funded</td>
<td>8,622,320</td>
<td>258,669</td>
<td>8,880,890</td>
<td>258,570</td>
<td>99</td>
<td>3.00</td>
<td>258,571</td>
</tr>
<tr>
<td>SUB-TOTAL</td>
<td>8,622,320</td>
<td>258,669</td>
<td>8,880,890</td>
<td>258,570</td>
<td>99</td>
<td>3.00</td>
<td>258,571</td>
</tr>
<tr>
<td>Department Funded</td>
<td>19,065,304</td>
<td>571,959</td>
<td>19,635,193</td>
<td>569,888</td>
<td>2,070</td>
<td>2.99</td>
<td>569,890</td>
</tr>
<tr>
<td>SUB-TOTAL</td>
<td>19,065,304</td>
<td>571,959</td>
<td>19,635,193</td>
<td>569,888</td>
<td>2,070</td>
<td>2.99</td>
<td>569,890</td>
</tr>
<tr>
<td>GRAND TOTAL</td>
<td>27,687,625</td>
<td>830,628</td>
<td>28,516,084</td>
<td>828,459</td>
<td>2,169</td>
<td>2.99</td>
<td>828,462</td>
</tr>
</tbody>
</table>
```
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

<table>
<thead>
<tr>
<th>Name/Employee ID</th>
<th>Title Code/Dept. Title Dept Desc.</th>
<th>Pay Sched./Time%</th>
<th>Current Salary/Rate</th>
<th>Grade</th>
<th>Eval Date (MM/YY)</th>
<th>Perf Rating</th>
<th>Pct Incr.</th>
<th>Annual Increase</th>
<th>New Salary/Rate</th>
</tr>
</thead>
</table>

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

AUDIT PAST DATA: 99 MERIT JULY 2016
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.
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

- **GENERAL MERIT PROGRAM AND/OR WEB MERIT QUESTIONS**
  - AMY ARNOLD -- EXT. 4068 OR AMY.ARNOLD@HR.UCSB.EDU

- **BUDGET & PLANNING**
  - SANDRA PEREZ -- EXT. 4052 OR SANDRA.PEREZ@UCSB.EDU
    - FUNDING QUESTIONS