Web Merit User Instructions

Presented by Human Resources

May 2017
Web Merit Topics

- Web Merit Roles
- Accessing Web Merit
- Web Merit Rosters
- Web Merit Cost Summary
- Reports & Approvals
WEB Merit Roles
Web Merit Background

The Web Based Merit Entry (Web Merit) system 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.
Accessing Web Merit
Web Merit Access

• Users may access Web Merit through Human Resource’s website at http://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.

University of California

Payroll/Personnel System

Main Menu

Employee Database (EDB) Inquiry

EDB Update System
- 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.
Web 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.’

```
<table>
<thead>
<tr>
<th>Select</th>
<th>CycleID</th>
<th>CBUC</th>
<th>Description</th>
<th>Status</th>
<th>BW Effect Date</th>
<th>MO Effect Date</th>
</tr>
</thead>
<tbody>
<tr>
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<td>SX</td>
<td>06 TRAINING SAMPLE</td>
<td>O</td>
<td>10/01/2006</td>
<td></td>
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<td>o</td>
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<td>CX</td>
<td>CX SALARY RANGE INCREASE</td>
<td>U</td>
<td>07/07/2013</td>
<td>07/01/2013</td>
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<td>CX 1 STEP 7 2016</td>
<td>CX</td>
<td>CX 1 STEP INC 7 2016</td>
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<td>07/05/2015</td>
<td>07/01/2015</td>
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<td>07/01/2014</td>
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<td>07/07/2013</td>
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<td>07/07/2013</td>
<td>07/01/2013</td>
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<td>07/01/2011</td>
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<td>07/01/2014</td>
</tr>
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<td>o</td>
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<td>SX</td>
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<td>O</td>
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<td>SX</td>
<td>SX JULY 2013 STEP</td>
<td>H</td>
<td>07/07/2013</td>
<td>07/01/2013</td>
</tr>
<tr>
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<td>SX</td>
<td>MERIT STEP TEST</td>
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<td>07/01/2013</td>
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<td>CX</td>
<td>CX BIWEEKLY STEP</td>
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<td>07/07/2013</td>
<td>07/01/2013</td>
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<tr>
<td>o</td>
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<td>06/19/2016</td>
<td>07/01/2016</td>
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<td>U</td>
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<td>07/01/2017</td>
</tr>
<tr>
<td>o</td>
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<td>99</td>
<td>99_NE 3 RETRO JULY 2015</td>
<td>U</td>
<td>06/21/2015</td>
<td>07/01/2015</td>
</tr>
<tr>
<td>o</td>
<td>99MERITTEST</td>
<td>99</td>
<td>99 MERIT INCREASE</td>
<td>H</td>
<td>07/07/2013</td>
<td>07/01/2013</td>
</tr>
<tr>
<td>o</td>
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<td>99</td>
<td>99 3 07/14 GEN SAL. INC.</td>
<td>U</td>
<td>06/22/2014</td>
<td>07/01/2014</td>
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</tbody>
</table>
```
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 screenshot 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 Merit preliminary roster are corrected in PPS.

• Corrections cannot be made to the preliminary merit roster and data cannot be saved to the preliminary merit roster during this phase.
Web Merit Rosters (Final)

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.
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**: 800032300
- **Name**: WILLY.CHILL E
- **Cycle**: GN-TESTDATA

- **Home Department Code**: 012500
- **Next Merit Review Date**: 10/96
- **Home Department**: BIOENGINEERING DEPARTMENT
- **Next Merit Review Code**: 2
- **Most Recent Hire Date**: 09/15/1997
- **Probationary Period End Date**: 03/15/1998

#### Appointment 30 BIOENGINEERING DEPARTMENT

<table>
<thead>
<tr>
<th>Dist#</th>
<th>FAU/Translation</th>
<th>DOS</th>
<th>Pct</th>
<th>Old Annual Salary/Old Rate</th>
<th>New Annual Salary/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>44026102A 1990001 ENGR/BIOENGR-OFER/ADMIN</td>
<td>REO</td>
<td>1.00</td>
<td>54288.00</td>
<td>62431.20/5202.60</td>
<td>15.00</td>
<td>8143.20</td>
<td>10/01/2005</td>
<td>Indefinite</td>
<td>0143.20</td>
<td>6107.40</td>
</tr>
</tbody>
</table>

**Comments:**

[Comments field]

[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.

IF an ineligible employee appears on the roster, do not delete them. Please contact 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 and new step should automatically be updated when the performance rating and date are entered. Once the entries are made, select Save Changes.
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

<table>
<thead>
<tr>
<th>Standard Definition</th>
<th>Std Perf Rating</th>
<th>Acceptable Range Increase</th>
<th>Required or Recommended</th>
</tr>
</thead>
<tbody>
<tr>
<td>X No Performance Evaluation Conducted</td>
<td>X</td>
<td>0.00 - 6.00</td>
<td>Recommended</td>
</tr>
<tr>
<td>1 Fails to Meet, Unsatisfactory</td>
<td>0</td>
<td>0.00 - 6.00</td>
<td>Recommended</td>
</tr>
<tr>
<td>2 Partially Meets, Improvement Needed</td>
<td>2</td>
<td>0.00 - 6.00</td>
<td>Recommended</td>
</tr>
<tr>
<td>3 Meets Expectation, Satisfactory</td>
<td>3</td>
<td>0.00 - 6.00</td>
<td>Recommended</td>
</tr>
<tr>
<td>4 Exceeds Expectations, More than Satisfactory</td>
<td>4</td>
<td>0.00 - 6.00</td>
<td>Recommended</td>
</tr>
<tr>
<td>5 Superior, Outstanding</td>
<td>5</td>
<td>0.00 - 6.00</td>
<td>Recommended</td>
</tr>
</tbody>
</table>

UCSB Performance Rating Chart

<table>
<thead>
<tr>
<th>UCSB's Performance Evaluation Ratings Definitions</th>
<th>Rating</th>
</tr>
</thead>
<tbody>
<tr>
<td>No Performance Evaluation Conducted</td>
<td>X</td>
</tr>
<tr>
<td>Exceptional</td>
<td>1</td>
</tr>
<tr>
<td>Exceeds Expectations</td>
<td>2</td>
</tr>
<tr>
<td>Fully Meets Expectations/Solid Performance</td>
<td>3</td>
</tr>
<tr>
<td>Improvement Needed</td>
<td>4</td>
</tr>
<tr>
<td>Consistently Below Expectations</td>
<td>5</td>
</tr>
</tbody>
</table>
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.

![Salary Range Information](image-url)
Web Merit Cost Summary
# Web Merit Cost Summary

## 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

---

<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>

[Back to Dept List]
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>
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 Human Resources to process 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

**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

<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>Pct Incr.</th>
<th>Annual Increase</th>
<th>New Salary/Rate</th>
</tr>
</thead>
</table>

[Back to Dept List](#)  
[Next](#)
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 Chuck Haines in the Budget & Planning Office.
General Web Merit Information and Contacts
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.

• A Performance Evaluation date is required, even for an ineligible employee. If an ineligible employee is on your roster, please enter “X” for the rating, 06/17 as the date, and “0” for the merit percentage.

• 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