Gaining Access for Merit Entry

Request merit access with the Request for Access to Payroll/Personnel System (PPS) form: http://www.hr.ucsb.edu/sites/www.hr.ucsb.edu/files/forms/PPS_Request_for_Access_Form.pdf

If you already have PPS access check the “Modify” box. If you do not already have PPS access, check the “Add (new account)” box.

There are 2 levels of access:

The Department is responsible for input of employee specific merit recommendations and performance evaluation ratings for their department.

The Control Point is the central unit responsible for a group of departments, and ensures that departmental merit recommendations are within the campus control allocation.

Check the box appropriate for your level of access.

Complete the rest of the form as appropriate and send to the PPS Account Coordinator (or FAX x8682).

Merit Cycles

The entire merit process is referred to as a “cycle” and has a number of sequential processing stages.

The chart to the right shows the approximate duration, descriptions and status codes for the sequential processing stages in a typical merit cycle.

Pay attention to the window dates when they are given, as they are brief and very rigid. Reminder announcements are posted to the PPS Listserv during the cycle. Once a stage is finished there is no going back!

A “freeze” on PPS actions involving the affected population will be in force starting at 3:00 p.m. on the final day of departmental preliminary review through the completion of the merit process. Please wait until an announcement ending the freeze is posted to the PPS Listserv before resuming PPS transactions on the affected population.

Web Merit Cycle

<table>
<thead>
<tr>
<th>Window</th>
<th>Processing Stage</th>
<th>Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>1-2 days</td>
<td>Control Points review</td>
<td>H</td>
</tr>
<tr>
<td></td>
<td>Preliminary Roster</td>
<td></td>
</tr>
<tr>
<td>3-4 days</td>
<td>Depts review</td>
<td>D</td>
</tr>
<tr>
<td></td>
<td>Prelim Roster</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Make data corrections in PPS</td>
<td></td>
</tr>
<tr>
<td></td>
<td>PPS Freeze begins at 5:00 p.m. on</td>
<td></td>
</tr>
<tr>
<td></td>
<td>the final day of Status “D” and</td>
<td></td>
</tr>
<tr>
<td></td>
<td>ends after merits are updated</td>
<td></td>
</tr>
<tr>
<td>1-2 days</td>
<td>Control Points review</td>
<td>S</td>
</tr>
<tr>
<td></td>
<td>Final Roster</td>
<td></td>
</tr>
<tr>
<td>1 week</td>
<td>Depts ENTER merits on</td>
<td>O</td>
</tr>
<tr>
<td></td>
<td>Final Roster</td>
<td></td>
</tr>
<tr>
<td>1-4 days</td>
<td>Control Points review</td>
<td>N</td>
</tr>
<tr>
<td></td>
<td>Final Roster (with entered merits)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>PPS Freeze ends</td>
<td></td>
</tr>
</tbody>
</table>

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**Logging on**
Go to the PPS Web Logon at:
https://pps.ucop.edu/pp8/login.jsp
Enter your UserID and Password. If you don’t have an account, refer to “Gaining Access for Merit Entry” above. If you have an account but are having trouble logging on, contact the PPS Account Coordinator in Accounting, x2880.

PLEASE NOTE: Web Merit does not work in Internet Explorer 10 or higher. Please use Firefox, Chrome or some other browser.

**Main Menu**
Select “Web Merit” from the Main Menu.

**Merit Menu**
Select “Merit Review/Input”
Roster Cycle List
Look for the appropriate cycle(s) under the “CycleID” column.

Sometimes there is more than 1 cycle that you will need to utilize within a given merit cycle. Please note that you will be able to open only one cycle at a time.

Select a cycle by clicking the appropriate radio button under the “Select” column.
Click the “Submit” button.

Roster Department Selection
Using the appropriate Rule, select the desired Roster:

RULE
MERITDPT = Department Access
MERITCTL = Control Point Access

SELECT
This Dept = List of all employees in Department
Get All = List of all employees under Control Point
Down = List of Departments under Control Point

Both MERITDPT and MERITCTL can select “This Dept”. MERITCTL can also select “Get All” and “Down”.

Preliminary Merit Roster
Check for errors on Preliminary Merit Roster, such as employee names on the roster that shouldn’t be there, employee names not on the roster that should be, etc.

Informational Links
- Employee Name = Employee Detail
  ‘Snapshot’ of employee’s data from PPS
- Title Code = Title Code Range / Grade
- Perf Rating = Performance Rating Definitions
Web-Based Merit System Instructions

Informational Links (from Merit Roster)

Employee Name Link → Employee Detail

Shows employee data from a PPS “snapshot”. This is a helpful tool if you want to see data on an employee without having to go back into the PPS Employee DataBase (EDB). It can also provide clues as to why this employee is showing up on the merit roster (whether it’s appropriate or not).

Deleting an Employee from the Roster

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.

Title Code Link → Salary Range/Grade Table

Shows the salary range or grade rates.

Be aware that the system may issue a warning or prevent you from entering a rate that is above the maximum of the range. Please see the specific cycle’s guidelines for direction.

The system will accept a new rate that is below the range minimum. An error message will be displayed, but this is OK. After the merit process is complete the department needs to manually adjust the employee’s rate to meet the new minimum. (See “When a Merited Rate is Below the New Range Minimum” below.)

Perf Rating → Performance Rating Table

Shows the code definitions for the performance ratings. It also shows the recommended % increase based on the rating. The “Local Code” corresponds with the UCSB’s rating system:

<table>
<thead>
<tr>
<th>Web Merit Rating</th>
<th>Web Merit Rating Definition</th>
<th>NEW Performance Evaluation Rating Definitions</th>
</tr>
</thead>
<tbody>
<tr>
<td>5</td>
<td>Fails to meet, unsatisfactory</td>
<td>Consistently below expectations</td>
</tr>
<tr>
<td>4</td>
<td>Partially meets, improvement needed</td>
<td>Improvement needed</td>
</tr>
<tr>
<td>3</td>
<td>Meets expectations, Satisfactory</td>
<td>Fully Meets expectations/Solid Performance</td>
</tr>
<tr>
<td>2</td>
<td>Exceeds expectations, More than satisfactory</td>
<td>Exceeds expectations</td>
</tr>
<tr>
<td>1</td>
<td>Superior, Outstanding</td>
<td>Exceptional</td>
</tr>
<tr>
<td>X</td>
<td>No performance evaluation conducted</td>
<td>No performance evaluation conducted</td>
</tr>
</tbody>
</table>

NEW Performance Evaluation Rating Definitions

http://www.hr.ucsb.edu/managers/supervisors/performance-evaluations under “Useful Links – Performance Evaluation Forms – Non-Represented Staff”
Final Merit Roster

Directions for merit processing will vary depending on the cycle parameters and whether the affected population is on stepped or open salary ranges. The department may be asked to enter a recommended step and the system will calculate the salary rate and percentage increase. Or the department may be asked to enter a recommended percentage or annual dollar increase and the system will calculate the rest. Please refer to specific instructions given for the cycle.

1. Enter the month that the Performance Evaluation was done under “Eval Date”. The format is MM/YY (example, 07/17). You still need to enter an evaluation date even if no evaluation was done (where “X” is the Perf Rating). Refer to specific instructions for the appropriate date to enter when no evaluation was done.

2. Enter the Performance Rating (“Perf Rating”). Ratings MUST be reported as a WHOLE number (1, 2, 3, 4 or 5) or the character ‘X’.

3. Depending on the specific instructions given for the cycle, enter the recommended percentage/dollar increase or step.

4. Press the “Calculate” button to derive the “New Annual Salary/Rate”.

5. Press the “Save Changes” button BEFORE activating the “Cost Summary” button. Changes may be made as often as desired.

6. If required, verify that the total merit cost balances to the control % figure by pressing the “Cost Summary” button. (See “Cost Summary” section below.)

Note that all salary rates shown on this screen are at 100% time only. They do NOT incorporate individual employees’ percentage of time in their calculations.
Cost Summary

- Departments may be asked to balance the Annual Cost % to the posted control % figure. (3.0% in this example.) If directed by the cycle's instructions, this step must be completed. (Step 6 in “Final Merit Roster” above.)
- Both state funds and non-state funds totals must each balance to the posted control % figure.
- Costing figures DO incorporate employees’ time percentages. For example, the Current Salary Base is a calculation of total salary rates x appointments %.

Process Complete!

- The last “Save Changes” serves as the final submission of data. (Step 5 in “Final Merit Roster” above.)

New salary rates will be updated in the PPS Employee DataBase (EDB) at the completion of the merit cycle. The “Next Salary Review Date” field will be updated to the next annual cycle date.

When a Merited Rate is Below the New Range Minimum (Open Ranges only)

Sometimes the salary ranges will be range adjusted concurrently with the merit process. These range adjustments do NOT affect an employee’s salary rate UNLESS that employee’s new merited rate is below the new range minimum.

If an employee’s salary rate falls below the range minimum after the merit process, departments need to manually adjust the employee’s rate to meet the new minimum. Please note that this also applies to non-merited employees (e.g., ineligible because they are newly hired, etc.) who fall below their range minimums after a range adjustment.

If this happens in your department, please contact Amy Arnold at Ext. 4068 OR amy.arnold@hr.ucsb.edu.