2011-2012 Merit Program for
Policy-Covered (Nonexclusively Represented) Employees
Academic Affairs Instructions (UPDATED 10/12/11)

The Office of the President and Campus Human Resources have issued guidelines for implementing the 2011-2012 Staff Merit Pay Plan. That information is posted on Blink at http://blink.ucsd.edu/HR/comp-class/compensation/merit.html and includes details on eligibility, the program timeline and training session presentations on how to use Web Merit. Questions regarding these guidelines or how to use Web Merit should be directed to the Compensation and Records units of campus HR.

There are no supplemental VC guidelines this year. This document is intended to provide Academic Affairs departments with instructions regarding how to complete the merit process this year.

**Web Merit:** Web Merit is open for department entry effective October 7, 2011. The cycle ID name is Unit-99-Merit-2011.

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**Web Merit Access:** Business Officers and Designated HR Contacts have been granted access to Web Merit for their designated unit(s). By design, most departments have no more than two employees who have been granted access. If you are in one of these roles and do not have the access you believe you should, please notify your DSA. However, most access issues will have been worked out during the Web Merit test period.

**Technical Issues:** During the test period this year, a number of technical issues were discovered which necessitated a large number of employees having entries deleted from the Web Merit roster. Merit entries that have been deleted still show in the roster but are shaded in pink. You may click on the entry for additional information but cannot enter a merit increase using web merit. Department staff have the ability to delete additional entries, but SHOULD NOT undelete an entry without consulting with the Office of the EVC. Deleting and undeleting entries affects the allocation pool showing in Web Merit.

In many of the cases described below, employees will need to have their merit increase entered manually into PPS. Divisional Dean’s offices have been provided with complete lists of the employees affected by each issue described below. You are strongly encouraged to print the DELETEs report in the drop down menu on your department’s page in web merit to see which of your employees are affected and how. A small number of employees are affected by more than one of the technical issues.

1. There are 16 title code problems in the Web Merit system – employees in these title codes have had their entries deleted from web merit. If you click on the employee’s name that is highlighted in pink on the roster, it will display the statement...“Title Code problem with Web Merit System.” If otherwise eligible, these employees' merit increases will need to be entered manually (use reason code TC on Web Merit Budget reconciliation Report). **Affects 12 employees in 5 departments in Academic Affairs.**
(2) Employees participating in the Employee Reduction in Time (ERIT) program have had their entries deleted from web merit. If you click on the employee’s name that is highlighted in pink, it will display the statement…”Deleted appointment with RGS distribution as this inflates the costing.” If otherwise eligible, these employees’ merit increases will need to be entered manually (use reason code ERIT on Budget Reconciliation Report). Affects 24 employees (28 distributions) in 16 departments in Academic Affairs.

(3) Duplicate entries exist for some employees (due to Web Merit extracting STP, OTS and other DOS codes). These duplicate entries have been deleted by campus HR. If you click on the employee’s name that is highlighted in pink, it will display the statement…”Not applicable DOS Code for Web Merit Increase.” If otherwise eligible AND if none of the other issues described in this section apply, these employees’ merit increases may be entered using web merit, otherwise they will need to be entered manually (use reason code DOS on Budget Reconciliation Report). Affects 3 employees in 2 departments in Academic Affairs.

(4) Employees with RGS distributions associated with the same appointment that includes the employee’s REG distribution in PPS have had these entries deleted from Web Merit. If you click on the employee’s name that is highlighted in pink, it will display the statement…”Deleted appointment with RGS distribution as this inflates the costing.” If otherwise eligible, these employees’ merit increases will need to be entered manually (use reason code RGS on Budget Reconciliation Report). Affects 216 employees (225 distributions) in 32 departments in Academic Affairs.

Please note – departments that code RGS distributions in separate appointments from REG distributions will not have this same issue.

(5) Employees with improper coding of “Next Salary Review Code.” If a department failed to update employees’ PPS records to ensure that the “Next Salary Review Code” was “2” as instructed during the Web Merit training sessions, those employees do not appear on the merit roster. If otherwise eligible, these employees’ merit increases will need to be entered manually (use reason code RC on Budget Reconciliation Report). Affects 2 employees in 2 departments in Academic Affairs – affected departments will be provided with the names of employees for this category only.

(6) Ineligible employees who received a salary increase on or after January 1, 2011 and for whom departments HAVE NOT asked for an exception have had their entries deleted from Web Merit. If you click on the employee’s name that is highlighted in pink, it will display the statement…”Ineligible for merit - prior salary increase in 2011 - no exception requested.” No merit increase may be processed for these employees. Affects 50 employees in 12 departments in Academic Affairs.

(7) Other manually entered merits – there are a handful of very specific cases that will require that you process a manual merit, such as an employee who transferred from another UC campus without a break in service or another technical issues that caused an employee not to show on the merit roster or otherwise have their entry deleted. If any of these conditions exist, please
consult with the Office of the EVC before making the manual merit entry. Once approved you may make the manual merit entry in PPS and enter it into your Budget Reconciliation Report using reason code MISSING or OTHER.

Ineligible employees who received a salary increase on or after January 1, 2011 and for whom departments HAVE asked for an exception have not been deleted from Web Merit. However, they may have been deleted if they fall into one of the other categories described above. If so, their merit increase will need to be entered manually, otherwise it may be entered via Web Merit. Affects 181 employees in 53 departments in Academic Affairs. You may not make merit entries for these individuals (either in Web Merit or manually in PPS) until you receive notice from the Office of the EVC that our exception requests have been approved by the Chancellor. Still have not heard as of 10/12, 2:00 pm

Zero Merits: You will need to provide justification for any zero ($0) Web Merit entries as well as for any eligible employee not appearing in Web Merit for whom you are proposing a zero ($0) increase. It is not acceptable to propose a zero increase for an employee for whom you’ve asked and received an exception for merit eligibility – they must be treated in a consistent manner as other employees in your unit. Attach the explanation(s) to your signed Merit Salary Increase Reports.

Ineligible Employees: Employees deemed ineligible must be deleted from the merit roster as opposed to having a zero merit entered for them. This includes both employees with “I” or “U” performance ratings (departments should manually delete these employees from the roster), as well as employees who received a salary increase on or after January 1, 2011 for whom you have not asked for an exception (in most cases these employees will already have been deleted).

Manual merit process:

Update after 10/12 HR Contacts meeting:
It is recommended that departments not enter any manual merit increases in PPS until after they receive approval from the Office of the EVC on their Budget Reconciliation Report. Departments will have the opportunity to make manual merit entries in PPS the week of October 17th, so there is not an urgency to complete them by Friday the 14th. See additional information in the Instructions for Submission section.

Please follow these instructions exactly for all manual merits. All manually entered merit increases must use PPS action code 04 when keying the entry. PAN Notes should begin with the following exact wording “2011 MANUAL MERIT ENTRY” and include the employee’s evaluation rating and the date that the evaluation was signed. Departments must ensure that they properly include the cost of manually processed merit increases when they provide an accounting to the Office of the EVC. Any merit increase in excess of 3% must be offset elsewhere.

The cost of manually entered merit increases must be accounted for and added to your Web Merit Budget Reconciliation Report. To complete this report, fill in your department information and transfer the CURRENT SALARY BASE and ANNUAL COST figures from your Roster Costing Summary into the yellow boxes at the top of the form. The Roster Costing Summary will print as the last page of your Roster PDF. Then add information from your manually entered merit increases in the table below. Make
sure that all columns are filled in for each employee, and include the appropriate Reason Code. Most of
the cells on this spreadsheet are locked and you may only enter information into editable fields. The
spreadsheet will automatically calculate the additions to your merit pool and annual merit cost, and add
that to the figures from the Roster Costing Summary. **DEPARTMENTS MAY NOT AWARD MERIT
INCREASES IN EXCESS OF THEIR TOTAL MERIT POOL.** Budget reconciliation reports showing a negative
total balance will be returned to the department for revision. **Departments that have no manual merit
entries do not need to submit a Budget Reconciliation Report – the merit roster is all that is required.**

For each manually processed merit, you will need to attach a copy of the PAN to the Budget
Reconciliation Report and include this in the final packet that is sent to the Office of the EVC.

**Deadlines and Instructions for Submission of Merit Packets to the Office of the EVC:**

**Update after 10/12 HR Contacts meeting:**
Departments must complete their merit roster and Budget Reconciliation Report (with PROPOSED
manual merit entries) by Friday, October 14, 2011 at 4:00 pm. When this is done, please notify by
e-mail BOTH Bobb Barile (bbarile@ucsd.edu) and Joanna Mickel (jmickle@ucsd.edu) that your roster is
ready for review. If you have any manual merit entries to process in PPS, attach a copy of the Budget
Reconciliation Report to your notification email. The Office of the EVC will review the roster and
proposed manual merit entries and let you know if it is OK to proceed. Questions about how to enter
manual merits in PPS should be directed to Caprece Speaks-Toler (x44130) in the Compensation unit.
Once manual merit entries have been made you should follow the steps below to complete the
process. Completed merit packets are due in the Office of the EVC no later than **Thursday, October 20,
2011, by 4:30 pm.**

All Academic Affairs departments must submit their merit recommendation packets to the Office of the
Executive Vice Chancellor (University Center 106) no later than **Friday, October 14, 2011, by 4:30pm.**

This will allow us sufficient time to review all department recommendations, ensure that the Academic
Affairs targets have not been overcommitted, follow up with departments on any problems and prepare
our final submission to Human Resources. Formal notification of approved increases will be transmitted
to departments after we receive final approval from campus HR. Individual employees should not be
informed of approved increases until departments receive notification from the Office of the EVC.

Prior to submission of your final packet, please ensure that your web merit rosters are complete and
manual merit entries (if any) have been made in PPS. When you are sure you are done, print your Merit
Roster and Roster Costing Summary (select the Roster PDF in drop down menu on your department’s
page in web merit) and have your department head sign it, along with the **Budget Reconciliation Report**
(if applicable). In Academic Affairs the department head is normally the Chair or Director. If the Chair or
Director is unavailable, a Vice-Chair/Director or Divisional Dean/AVC may sign on their behalf, but the
Business Officer may not. No employee may sign off on the page containing their own merit.

The Merit Roster printout (with Roster Costing Summary), Budget Reconciliation Report (with attached
PANs) and written justification for any zero ($0) merit entries should be included with your final merit
packet. In addition to signing the Roster Costing Summary and Budget Reconciliation Report, the
department head should also initial any other documents submitted to the Office of the EVC, including
all pages of the merit roster. Once finalized, we recommend you hand carry the packet to Joanna Mickle in University Center 106, rather than sending via campus mail. Retain a copy for your files. Joanna can be reached at jmickle@ucsd.edu or x40129.

Departments are encouraged to complete the process as early as possible but not until all information has been resolved regarding requests for exceptions and properly making manual merit entries. If you complete your merit roster and Budget Reconciliation Report prior to the 14th, please send an email to Joanna Mickle and Bobb Barile so that we may begin reviewing your department submission. **Access to the on-line merit program will terminate at 4:00pm on Friday, October 14, 2011.** If you have any questions about the Academic Affairs process or these instructions, please do not hesitate to contact Bobb Barile (x41231) or Joanna Mickle (x40129). This information will also be posted on the Academic Affairs HR web page at: [http://academicaffairs.ucsd.edu/staffhr/](http://academicaffairs.ucsd.edu/staffhr/).