FY14 Merit

April 1, 2014
10:00 - Noon
SOP Auditorium
Agenda

• HRMS Upgrade highlights
• Merit Guidelines
  – Review of critical dates
  – Review of guidelines
• Merit Processing
  – Training on Payroll Increase Transaction page (PITP)
  – Timetable for paycheck results
Presenters

• Financial Systems
  – Kevin Curley

• Human Resource Services
  – Emily Runser

• Financial Services
  – Susan McKechnie
HRMS Upgrade
PeopleSoft 8.3 to 9.1
Merit Critical Dates and Guidelines
Dates

• Effective date: 4/1/14
• Increase will be processed in pay period #14-22
  – Pay period 4/20/14-5/3/14
  – Pay date 5/9/14
• One pay period later than prior COLA/Merits due to upgrade
• Employees terminating between 4/1 and 4/19 who get Merit will be processed with termination
# Critical Dates

<table>
<thead>
<tr>
<th>Date</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>April 8&lt;sup&gt;th&lt;/sup&gt;</td>
<td>CITS loads data to PITP</td>
</tr>
<tr>
<td>Non-SOM: April 9&lt;sup&gt;th&lt;/sup&gt;- April 20&lt;sup&gt;th&lt;/sup&gt;</td>
<td>Department Pay Increase Initiators enter and Pay Increase Approvers approve</td>
</tr>
<tr>
<td>SOM: April 9&lt;sup&gt;th&lt;/sup&gt;-April 16&lt;sup&gt;th&lt;/sup&gt;</td>
<td>SOM Dean’s Office review</td>
</tr>
<tr>
<td>SOM: April 17&lt;sup&gt;th&lt;/sup&gt;- April 20&lt;sup&gt;th&lt;/sup&gt;</td>
<td>SOM Dean’s Office review</td>
</tr>
</tbody>
</table>
### Critical Dates

<table>
<thead>
<tr>
<th>Date</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>April 9(^{th})-April 23(^{rd})</td>
<td>HR-Compensation Review and Approve</td>
</tr>
<tr>
<td>April 23(^{rd}) overnight</td>
<td>CITS loads PITP to Job record</td>
</tr>
<tr>
<td>April 24(^{th}) – April 28(^{th})</td>
<td>HR-Service Center manual entries if required</td>
</tr>
</tbody>
</table>
## Critical Dates

<table>
<thead>
<tr>
<th>Date</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>April 29&lt;sup&gt;th&lt;/sup&gt;</td>
<td>Payroll processing begins using new salaries with retro payments</td>
</tr>
<tr>
<td>April 29&lt;sup&gt;th&lt;/sup&gt; – May 1&lt;sup&gt;st&lt;/sup&gt;</td>
<td>Dept PR Reps review cost center/payroll register reports</td>
</tr>
<tr>
<td>May 2&lt;sup&gt;nd&lt;/sup&gt;</td>
<td>Gross pay transmitted to CPB</td>
</tr>
<tr>
<td>May 9&lt;sup&gt;th&lt;/sup&gt;</td>
<td>Pay day #14-22</td>
</tr>
</tbody>
</table>
General Guidelines

• Eligible Employee Classes:
  – Faculty (01, 02, 03, 15)
  – *Post Docs/Trainees (19)
  – Regular Staff (20, 33)
  – **Contingent 2 Staff (22, 35)

*subject to school policy

** Eligible at contract renewal or conversion date- will not be processed on PITP
General Guidelines

• Employee must be ACTIVE on 3/31/14 AND 4/1/14
  – Employees terminating/retiring on 3/31/14 do not get Merit even though last paycheck and payout is done after 4/1/14

• Employees must not be on probation (original or job change)
  – Exception is if job change was a lateral (same pay grade) with no salary increase

• PDP for period ended 3/31/13 must be at Meets Standards or higher
General Guidelines

• Eligible Comp Rate Codes:
  – ANNLEL - Annual
  – ACSPEL - Academic Subsidy
  – ADSPEL - Administrative Subsidy
Specific Guidelines- Non-exempt

• Empl class 20 (Non-exempt Regular)
  – Merits will be entered as percentages
  – Same percentages apply to all schools and central units
  – Same percentages apply to all salary levels
  – Percentages may vary based on PDP
  – The default percentage will be 2.5% (meets standards)- departments must change percent for those employees who are unsatisfactory, below, above, or outstanding
Specific Guidelines - Non-exempt

- Empl class 20 (Non-exempt Regular)

<table>
<thead>
<tr>
<th>3/31/13 PDP Rating</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unsatisfactory or Below Standards</td>
<td>0%</td>
</tr>
<tr>
<td>Meets Standards</td>
<td>2.5%</td>
</tr>
<tr>
<td>Above Standards*</td>
<td>2.7%</td>
</tr>
<tr>
<td>Outstanding*</td>
<td>3.0%</td>
</tr>
</tbody>
</table>

*Above Standards and Outstanding must have PDP on file with HRS
Specific Guidelines- Non-exempt

• Empl class 20 (Non-exempt Regular)
  – If merit increase brings employee over the maximum salary range then the employee is ELIGIBLE for a one-time payment
  – HR-Comp will reduce the merit and notify departments regarding who is affected
    • Completion of Merit One-Time Payment form (on FSPR website) will be required with Dean or VP approval and processed in PP14-23 or later
    • Earnings code NMP will be used
Specific Guidelines- Exempt

• Empl class 33 (Exempt Regular)
  – Merits will be entered as percentages
  – Percentages may vary by School or Central Unit
  – Percentages may vary by annualized salary level
    • Greater than $60,000
    • Less than $60,000
  – Percentages may vary based on PDP
  – The default percentage will be 0%- departments must enter percent for all employees
Specific Guidelines- Exempt

• Communication came from Deans’ or VPs’ offices for the percentages/pools applicable to your departments

• For those units that are calculating merit based on amount- you must convert the amount to a percentage before entering
  – Percentages can be entered using up to 4 decimals
  – Ex. 2.3456%
Specific Guidelines- Exempt

• Empl class 33 (Exempt Regular)
  – If merit increase brings employee over the maximum salary range then the employee is ELIGIBLE for a one-time payment for the excess above the max
  – HR-Comp will reduce the merit and notify departments regarding who is affected
    • Completion of Merit One-Time Payment form (on FSPR website) will be required with Dean or VP approval and processed in PP14-23 or later
    • Earnings code EMP will be used
Specific Guidelines – C2

• Contingent Category 2 (Empl Classes 22 or 35)
  – If eligible per contract – marked MERIT ELIGIBLE will receive Merit upon contract renewal or conversion on the date of renewal or conversion
  – C2s will not be loaded on the PITP
Specific Guidelines - Staff

• No merit for Unsatisfactory or Below Standards and increased merit for Above Standards or Outstanding for Non-exempt and Exempt are required to have the April 1, 2012 to March 31, 2013 PDP on file with HRS by April 1, 2014

• Otherwise the PDP will default to Meets Standards
Specific Guidelines - Staff

• The FY14 Staff Merit One-Time Payment form must be completed and submitted to HR-Comp for review by the following deadlines:
  – For PP#14-23 payment: Monday, May 5th
  – For PP#14-24 payment: Friday, May 16th
  – For PP#14-25 payment: Monday, June 2nd
• Dean/VP (or designee) signature required on the form before it is sent to HR-Comp
• Form is on FSPR website:
  http://www.fincsvc.umaryland.edu/payroll/forms.cfm
Specific Guidelines - Faculty

- Empl classes 01 (Tenured), 02 (Tenure-track), 03 (Non-tenured), 15 (Librarians) and 19 (Post Docs)
  - Merits will be entered as amounts
  - Amounts may vary by School
  - Amounts may vary by annualized salary level
    - Greater than $60,000
    - Less than $60,000
Specific Guidelines- Faculty

• Communication came from Deans’ or VPs’ offices for the percentages/pools applicable to your departments

• For those units that are calculating merit based on percentage - you must convert the percentage to an amount before entering
  – Amounts can be entered using up to 2 decimals
  – Ex. $1200.00
Terminations

• Terminations between April 1\textsuperscript{st} and April 19\textsuperscript{th} will require TWO EA forms
  – Merit EA form effective April 1, 2014
  – Termination EA form - effective date

• If terminating employee appears on the PITP, the merit should be entered as 0% or $0
PDP Rating Report

• If you would like a report with your employees’ PDP ratings that were submitted to HRS

• Please E-mail the department numbers needed to HRWeb@umaryland.edu

By Friday, April 4th
Questions or Comments on Merit Guidelines
Payroll Increase Transaction Page (PITP) Processing
PITP

• What is it?
  – A custom eUM page to facilitate the review and approval of mass updates to salary

• Who has access in departments?
  – Employees with roles of:
    • Pay Increase Initiator
    • Pay Increase Approver
PITP Access

PR Reps should look at department security to see who has Payroll Increase roles:

1- Enter UMB_PAYINC in Role Name field
2- Sort by Role Name
3- Click Fetch button
PITP Access

• Results:

<table>
<thead>
<tr>
<th>Access DeptID</th>
<th>Role Name</th>
<th>Empl Name</th>
<th>Empl ID</th>
<th>Pay Status</th>
<th>EE Job DeptID</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>15100000</td>
<td>UMB_PAYINC_APPROVE</td>
<td>Doe, Lotta</td>
<td>345678</td>
<td>Active</td>
<td>15100000</td>
<td>Details</td>
</tr>
<tr>
<td>15100000</td>
<td>UMB_PAYINC_APPROVE</td>
<td>Leeve, Ivana</td>
<td>967654</td>
<td>Active</td>
<td>15100000</td>
<td>Details</td>
</tr>
<tr>
<td>15100000</td>
<td>UMB_PAYINC_INIT</td>
<td>Tryan, Ima</td>
<td>123456</td>
<td>Active</td>
<td>15100000</td>
<td>Details</td>
</tr>
</tbody>
</table>
PITP Access

• Each dept should have at least:
  – 1 person with UMB_PAYINC_INIT role
  and
  – 1 person with UMB_PAYINC_APPROVE role
• A person cannot have BOTH roles
• People who have each of these roles must be available to enter or approve between April 9th and April 20th
PITP Roles

• UMB_PAYINC_INIT (Initiator)
  – Can update Eligibility field and enter reason if changed to ineligible
  – Can enter the merit increase and FTE (if applicable)

• UMB_PAYINC_APPROVE (Approver)
  – Can update Department Approved field

• If no one in your department has either of these roles you need to submit a new eUM HRMS User Authorization form by Fri 4/4
  
  http://www.umaryland.edu/cits/communications_forms/forms/
PITP Defaults

- Data in the PITP will include all employee information entered by HRSC through April 7\textsuperscript{th}
- PITP will be loaded on Tuesday, April 8\textsuperscript{th}
- All eligible comp rates for all eligible employee classes will appear on the PITP and will be defaulted to an approved status=No
- Staff employees on original probation will be loaded to PITP but marked ineligible with reason = probation
PITP Eligibility Exceptions

• Types of eligibility exceptions that may require action:
  – Post Docs on NRSA grants
  – Regular staff and faculty with wrong comp rate codes
  – Unprocessed Terminations
  – Pre-4/1/14 employee actions

• Changes to PITP require supporting documentation be submitted to HR-Compensation
PITP Defaults

• Pay increase initiators will have to:
  – Non-Exempt
    • Change NEX employees with Unsatisfactory, Below Standards, Above Standards, or Outstanding ratings
    • Meets Standards is defaulted to 2.5% and only approval is required
  – Exempt
    • All %s will need to be entered based upon PDP ratings and/or as prescribed by Dean or VP
  – Faculty
    • Enter $ amount based upon Dean or VP guidelines
    • SOM- FTE adjustment may be changed due to TAS increase
Using the PITP- Init & Appr

- Main Menu> Workforce Administration> Job Information> UMB Pay Increase Transaction
- Data is processed by Dept and Empl Class
Using the PITP- Init & Appr

- Leave criteria blank to search for all you have access to

![Search Criteria](image-url)
Using the PITP - Initiator

• Sample view for Pay Inc Initiator- 33 Exempt Regular
Using the PITP - Initiator

- Initiator can change Elig Stat and Reason
Using the PITP- Initiator

- Initiator can enter or override the Change Amount or Change Percent
- Department Approved and Load to Job columns are grayed out and set to No
Using the PITP- Initiator

• Don’t forget to click the SAVE button when you finish entering!
Using the PITP - Initiator Samples

- Faculty with ADSPEL - appears on PITP

- Faculty with ADSPIN - not on PITP

- Note - the FTE field and Change Amount fields can be updated for faculty
Specific Guidelines- SOM Faculty

• Clinical Faculty-
  – If the annual salary is less than Total Approved Salary (TAS) then the FTE may need to be changed to reflect the percentage of TAS that is paid by UMB
  – FTE= UMB salary/TAS
  – FTE can be entered using up to 4 decimals
  – If you are not giving a raise in eUMB but you have increased the salary in the practice plan you may need to change the FTE

• Basic Science Faculty-
  – Full-time faculty not fully funded need to be reflected as 1 FTE

• Contact Ron Powell x6-2607 or Jim Airey x6-2880 with questions
Using the PITP- Approver

- Sample view for Pay Inc Approver

<table>
<thead>
<tr>
<th>Name</th>
<th>Emp ID</th>
<th>Emp Record</th>
<th>Effective Date</th>
<th>Emp Class</th>
<th>GFT</th>
<th>Std Hrs</th>
<th>New Standard Hours</th>
<th>Current FTE</th>
<th>New FTE</th>
<th>Pay Inc Type</th>
<th>See Hrs</th>
<th>Elig Stat</th>
<th>Elig Override Reason</th>
<th>Comp Rate Code</th>
<th>Current Comp Rate</th>
<th>Change Amount</th>
<th>Change Percent</th>
<th>Comp Rate New</th>
<th>Department Approved?</th>
<th>Hire/Rehire</th>
<th>Job Code</th>
<th>VSL/Parent Type</th>
<th>Load to DOB?</th>
<th>Load Override Reason</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bragg, Chandler</td>
<td>524796</td>
<td>014002094</td>
<td>01-01-2024</td>
<td>33-Employee</td>
<td>40.00</td>
<td>40.00</td>
<td>1.0000</td>
<td>1.0000</td>
<td>1.0000</td>
<td>1</td>
<td>1</td>
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<td>1 Eligible</td>
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<td>E0710E</td>
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</tr>
<tr>
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<td>1</td>
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<tr>
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<tr>
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<tr>
<td>Tribani, Joseph</td>
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<td>01-01-2024</td>
<td>33-Employee</td>
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<td>09/14/2013</td>
<td>E1287J</td>
<td>No</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- FTE, Elig Stat, Elig Override Reason, Change Amount or Change Percent cannot be updated

- If a change needs to be made, the approver must ask the initiator to make the change
Using the PITP- Approver

- Approver can only change Department Approved field- defaults to No and grays out when changed to Yes
- Load to job field matches Dept Approved field
Using the PITP- Approver

• Don’t forget to click the SAVE button after entering approval!

• Once the Approver has changed Department Approved? field to Yes and saved, then further changes cannot be made by the department
  – Contact HR-Comp if corrections are needed
Using the PITP- Approver

• Approved status should be set to YES for all employees by the department before Monday, April 21\textsuperscript{st} (or before Thursday, April 17\textsuperscript{th} for SOM)
  – Status is Eligible with Amount or Percent $\neq$ 0 and Approved = YES
  – Status is Eligible with Amount or Percent = 0 and Approved = YES
Or
  – Status is Ineligible and Approved = YES
Using the PITP - HR Comp

- HR Comp has final approval and they use the Load to Job field
- HR Comp can also update any of the other fields
IMPORTANT!

• HR-Compensation must have documentation to support the reason why a dept made an employee ineligible to receive Merit
Job Data Updates

• Only 1 new job data row will be inserted even if there are multiple PITP rows (i.e. ANNLEL with ADSPEL)

• Ineligible comp rate codes will be inserted on new job data row with the updated eligible comp rates (i.e. ANNLEL with ADSPIN)

• Depts can view the job data rows on morning of Thursday, April 24th
Paycheck Communications

• E-mail template will be sent to PR Reps to customize and send to your employees
• Please distribute by Friday, April 11th
• Employees should be referred to your department payroll rep if they have questions about their paychecks
Paycheck results

• PP# 14-20- Period 3/23-4/5- Payday 4/11/14
  – No changes to gross salary
  – *Health deduction holiday

• PP# 14-21- Period 4/6-4/19- Payday 4/25/14
  – No changes to gross salary
  – *Health deduction holiday

• PP# 14-22- Period 4/20-5/3- Payday 5/9/14
  – New gross salary includes merit increase
  – Additional retro pay for period April 1st- April 19th

*Medical, Dental, and Pharmacy deductions
Paycheck results

• PP#14-23- Period 5/4-5/17- Payday 5/22/14
  – Early payday (Thursday)
  – Normal gross salary includes merit increase and will continue until next Employee Action
  – One-time merit payments can start with this pay period
Key Contacts

• HR- Compensation- 6-6338
  – Eligibility questions
  – HRComp@umaryland.edu

• CITS- 6-HELP(4357)
  – Security/access questions
  – help@umaryland.edu

• FS- Payroll- 6-1243
  – Retro pay questions
  – DL-BFPayrollHelp@af.umaryland.edu
Questions or Comments on PITP Processing