FY15 Merit

June 18, 2014
10:00 - Noon
SOP Auditorium
Agenda

• Merit Guidelines
  – Review of critical dates
  – Review of guidelines

• Merit Processing
  – Training on Payroll Increase Transaction page (PITP)
  – Timetable for paycheck results

• Misc payroll topics
Presenters

• Human Resource Services
  – Emily Runser

• Financial Services
  – Susan McKechnie
Merit Critical Dates and Guidelines
Dates

• Effective date: 7/1/14
• Increase will be processed in pay period #15-02
  – Pay period 7/13/14-7/26/14
  – Pay date 8/1/14
• Employees terminating between 7/2 (last day worked 7/1) and 7/12 will have merit processed with termination (in PP#15-01)
## Critical Dates

<table>
<thead>
<tr>
<th>Date</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>June 24&lt;sup&gt;th&lt;/sup&gt;</td>
<td>ePAF approval through Compensation (actions approved by Comp after this date will be processed post-merit)</td>
</tr>
<tr>
<td>June 24&lt;sup&gt;th&lt;/sup&gt;</td>
<td>Paperwork must be in HR-Service Center for exceptions</td>
</tr>
</tbody>
</table>
# Critical Dates

<table>
<thead>
<tr>
<th>Date</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>July 1&lt;sup&gt;st&lt;/sup&gt;</td>
<td>CITS loads data to PITP</td>
</tr>
<tr>
<td><strong>Non-SOM:</strong></td>
<td></td>
</tr>
</tbody>
</table>
| July 2<sup>nd</sup> – July 13<sup>th</sup> | Department Pay Increase  
Initiators enter and Pay  
Increase Approvers approve |
| **SOM:**      |                                                                        |
| July 2<sup>nd</sup> – July 9<sup>th</sup> | Department Pay Increase  
Initiators enter               |
| **SOM:**      |                                                                        |
| July 10<sup>th</sup> – July 13<sup>th</sup> | SOM Dean’s Office approves               |
### Critical Dates

<table>
<thead>
<tr>
<th>Date</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>July 9&lt;sup&gt;th&lt;/sup&gt; – July 16&lt;sup&gt;th&lt;/sup&gt;</td>
<td>HR-Compensation Review and Approve</td>
</tr>
<tr>
<td>July 17&lt;sup&gt;th&lt;/sup&gt; Early AM</td>
<td>CITS loads PITP to Job record</td>
</tr>
<tr>
<td>July 17&lt;sup&gt;th&lt;/sup&gt; – July 18&lt;sup&gt;th&lt;/sup&gt;</td>
<td>HR-Service Center EA Form entry</td>
</tr>
</tbody>
</table>
## Critical Dates

<table>
<thead>
<tr>
<th>Date</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>July 22\textsuperscript{nd}</td>
<td>Payroll processing begins using new salaries with retro payments</td>
</tr>
<tr>
<td>July 22\textsuperscript{nd} – July 25\textsuperscript{th}</td>
<td>Dept PR Reps review cost center/payroll register reports</td>
</tr>
<tr>
<td>July 25\textsuperscript{th}</td>
<td>Gross pay transmitted to CPB</td>
</tr>
<tr>
<td>August 1\textsuperscript{st}</td>
<td>Pay day #15-02</td>
</tr>
</tbody>
</table>
General Guidelines

• Eligible Employee Classes included on PITP:
  – Faculty (01, 02, 03, 15)
  – Post Docs/Trainees (19)*
  – Regular Staff (20, 33)

• Eligible Employee Classes processed separately from PITP:
  – Contingent 2 Staff (22, 35)
  – Chart available with award schedule

*subject to school policy
General Guidelines

• Applicable to eligible Faculty and Staff regardless of funding source

• Departments must administer merit in a fair and equitable distribution across all eligible employees
General Guidelines

• Employee must be ACTIVE on 6/30/14 AND 7/1/14
  – Employees terminating/retiring on or before 6/30/14 do not get Merit even though last paycheck and payout is done after 7/1/14

• PDP for period ended 3/31/14 must be at Meets Standards or higher
General Guidelines

• Employees who have completed 120 days prior to 3/31/14 (EX and NEX PDP end date) and have FY14 PDP (4/1/13-3/31/14) on file with HR-ELR are eligible for merit
  – Required 120 days assessment to include 12/1/13-3/31/14 rating period and submission of PDP
  – Probation does not have to be completed if the employee has completed at least 120 days and received a NEX PDP by 3/31/14 or EX PDP by 6/2/14
General Guidelines

• Eligible Comp Rate Codes:
  – ANNLEL - Annual
  – ACSPEL - Academic Supplement
  – ADSPEL - Administrative Supplement

• PDP ratings for staff must be entered on the PITP
  – All staff (EX and NEX) will default to Meets Standards
  – All others will default to Not Applicable
Specific Guidelines- Non-exempt

- Empl class 20 (Non-exempt Regular)
  - All NEX must receive a merit increase regardless of funding and same percentages apply to all schools and central units
  - Merits will be entered as percentages based on PDP as prescribed by the President
  - The default loaded into PITP:
    - Percentage = 2.5%
    - Rating = “Meets Standards”
  - For NEX Regular where PDP is unsatisfactory, below, above, or outstanding departments will need to change:
    - Percentage and
    - Rating
Specific Guidelines - Non-exempt

- Empl class 20 (Non-exempt Regular)

<table>
<thead>
<tr>
<th>3/31/14 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>2.75%</td>
</tr>
<tr>
<td>Outstanding*</td>
<td>3.0%</td>
</tr>
</tbody>
</table>

*Above Standards and Outstanding must have PDP on file with HRS-ELR by 3/31/14
Specific Guidelines- NEX Over Max

• Empl class 20 (Non-exempt Regular)
  – If merit increase brings employee over the maximum salary range, the employee is ELIGIBLE for a one-time payment of the amount above the maximum
  – HR-Comp will reduce the merit and notify Deans’/VPs’ offices regarding who is above maximum
    • Up to the Deans’/VPs’ offices to communicate with depts affected
Specific Guidelines- NEX Over Max

• Empl class 20 (Non-exempt Regular)
  – Completion of Merit One-Time Payment form (on FSPR website) will be processed in PP#15-03 or later
  • Requires Dean or VP approval
  • Earnings code NMP will be used
  • Completed form with pre-print sent to HR-Comp for approval
Specific Guidelines- Exempt

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

• For those units 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)
  - Fair and equitable administration regardless of funding
  - School or Central Unit percentage range may not be decreased or increased outside range per Dean’s/VP’s direction
    - O% merit must have Dean’s/VP’s preapproval
Specific Guidelines- Exempt

- Empl class 33 (Exempt Regular)
  - Merit will be entered as percentage based on PDP rating and may vary by School or Central Unit
  - The default on the PITP is:
    - Percentage = 0%
    - Rating = “Meets Standards”
  - Departments will need to change:
    - Percentage for all
    - Rating for those where the PDP is unsatisfactory, below, above, or outstanding
Specific Guidelines- EX Over Max

• Empl class 33 (Exempt Regular)
  – If merit increase brings employee over the maximum salary range, the employee is ELIGIBLE for a one-time payment of the amount above the maximum
  – HR-Comp will reduce the merit and notify Deans’/VPs’ offices regarding who is above maximum
    • Up to the Deans’/VPs’ offices to communicate with depts affected
Specific Guidelines- EX Over Max

• Empl class 33 (Exempt Regular)
  – Completion of Merit One-Time Payment form (on FSPR website) will be processed in PP#15-03 or later
    • Requires Dean or VP approval
    • Earnings code EMP will be used
    • Completed form with pre-print sent to HR-Comp for approval
Exempt New Salary Structure

Exempt Salary Structure increased 8.7% at minimum and maximum of range.

<table>
<thead>
<tr>
<th>Pay Range</th>
<th>Minimum</th>
<th>Midpoint</th>
<th>Maximum</th>
</tr>
</thead>
<tbody>
<tr>
<td>C</td>
<td>$36,437</td>
<td>$52,187</td>
<td>$67,938</td>
</tr>
<tr>
<td>D</td>
<td>$42,937</td>
<td>$61,416</td>
<td>$79,895</td>
</tr>
<tr>
<td>E</td>
<td>$50,002</td>
<td>$71,470</td>
<td>$92,939</td>
</tr>
<tr>
<td>F</td>
<td>$57,068</td>
<td>$81,525</td>
<td>$105,983</td>
</tr>
<tr>
<td>G</td>
<td>$65,764</td>
<td>$94,026</td>
<td>$122,288</td>
</tr>
<tr>
<td>H</td>
<td>$76,090</td>
<td>$108,700</td>
<td>$141,310</td>
</tr>
<tr>
<td>I</td>
<td>$87,504</td>
<td>$124,462</td>
<td>$161,420</td>
</tr>
<tr>
<td>J</td>
<td>$96,743</td>
<td>$144,843</td>
<td>$192,943</td>
</tr>
<tr>
<td>K</td>
<td>$126,636</td>
<td>$214,196</td>
<td>$301,756</td>
</tr>
</tbody>
</table>
Exempt New Salary Structure

• Over maximum increases will be based on new salary structure maximums

<table>
<thead>
<tr>
<th></th>
<th>Current</th>
<th>New</th>
</tr>
</thead>
<tbody>
<tr>
<td>Exempt - C Maximum</td>
<td>$62,500.00</td>
<td>$67,938.00</td>
</tr>
<tr>
<td>ANNLEL</td>
<td>$62,750.00</td>
<td>$67,237.88</td>
</tr>
<tr>
<td>ANNLEL + 2.5% PDP</td>
<td>$64,318.75</td>
<td>$68,918.83</td>
</tr>
<tr>
<td>Lump Payout</td>
<td>$-</td>
<td>$980.83</td>
</tr>
<tr>
<td>New ANNLEL*</td>
<td>$64,318.75</td>
<td>$67,938.00</td>
</tr>
</tbody>
</table>

* New ANNLEL is At or Below new EX salary structure maximum.
Specific Guidelines – C2

• Contingent Category 2 (Empl Classes 22 or 35)
  – Eligible if contract marked as 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
<table>
<thead>
<tr>
<th>Date of Hire</th>
<th>Contract End Date</th>
<th>Contract Renewal Date</th>
<th>7/1/14 merit ex**</th>
<th>7/1/14 merit applied ex**</th>
<th>7/1/14 merit nex**</th>
<th>7/1/14 merit applied nex**</th>
</tr>
</thead>
<tbody>
<tr>
<td>1/1/2013</td>
<td>12/31/2013</td>
<td>1/1/2014</td>
<td>yes</td>
<td>1/1/2015</td>
<td>yes</td>
<td>1/1/2015</td>
</tr>
<tr>
<td>7/1/2013</td>
<td>6/30/2014</td>
<td>7/1/2014</td>
<td>yes</td>
<td>7/1/2015</td>
<td>yes</td>
<td>7/1/2015</td>
</tr>
<tr>
<td>10/1/2013</td>
<td>9/30/2014</td>
<td>10/1/2014</td>
<td>yes</td>
<td>10/1/2015</td>
<td>yes</td>
<td>10/1/2015</td>
</tr>
<tr>
<td>1/1/2014</td>
<td>12/31/2014</td>
<td>1/1/2015</td>
<td>no</td>
<td>NA</td>
<td>no</td>
<td>NA</td>
</tr>
<tr>
<td>2/1/2014</td>
<td>1/31/2015</td>
<td>2/1/2015</td>
<td>no</td>
<td>NA</td>
<td>no</td>
<td>NA</td>
</tr>
<tr>
<td>3/1/2014</td>
<td>2/28/2015</td>
<td>3/1/2015</td>
<td>no</td>
<td>NA</td>
<td>no</td>
<td>NA</td>
</tr>
<tr>
<td>4/1/2014</td>
<td>3/31/2015</td>
<td>4/1/2015</td>
<td>no</td>
<td>NA</td>
<td>no</td>
<td>NA</td>
</tr>
<tr>
<td>5/1/2014</td>
<td>4/30/2015</td>
<td>5/1/2015</td>
<td>no</td>
<td>NA</td>
<td>no</td>
<td>NA</td>
</tr>
<tr>
<td>6/1/2014</td>
<td>5/31/2015</td>
<td>6/1/2015</td>
<td>no</td>
<td>NA</td>
<td>no</td>
<td>NA</td>
</tr>
<tr>
<td>7/1/2014</td>
<td>6/30/2015</td>
<td>7/1/2015</td>
<td>no</td>
<td>NA</td>
<td>no</td>
<td>NA</td>
</tr>
<tr>
<td>8/1/2014</td>
<td>7/31/2015</td>
<td>8/1/2015</td>
<td>no</td>
<td>NA</td>
<td>no</td>
<td>NA</td>
</tr>
</tbody>
</table>
Specific Guidelines - Staff

• No merit for Unsatisfactory or Below Standards
• Merit increases for Above Standards or Outstanding for Non-exempt must be on file with HRS-ELR by 3/31/14 or employee Meets Standards
• Exempt PDPs are required in HRS-ELR by 6/2/14
Specific Guidelines - Staff

• The FY15 Staff Merit One-Time Payment form must be completed and submitted to HR-Comp for review by the following deadlines:
  – For PP#15-03 payment: Monday, July 28th
  – For PP#15-04 payment: Monday, August 11th
  – For PP#15-05 payment: Monday, August 25th

• Dean/VP’s office will prepare form and attach pre-print

• 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](http://www.fincsvc.umaryland.edu/payroll/forms.cfm)
Specific Guidelines- Faculty, Librarians, and Post Doctoral Fellows

• Empl classes:
  – 01 Tenured
  – 02 Tenure-track
  – 03 Non-tenured
  – 15 Librarians
  – 19 Post Docs (as applicable)

  – Merits will be entered as amounts
  – Amounts may vary by School
Specific Guidelines- Faculty

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

• For those units 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

• Strongly encouraged to award merit to separating (resignation, retirement, and layoff) employees

• Terminations effective between July 2\textsuperscript{nd} and July 12\textsuperscript{th} will require \textbf{TWO EA} forms by June 24\textsuperscript{th}
  
  – Merit EA form effective July 1, 2014
  
  – Termination (includes Merit ANNLEL) EA form - effective date
Terminations

• If EA forms are not submitted in time for HRSC processing, FSPR can accept PA forms to stop the regular pay due to termination but they cannot accept a PA form to add the merit pay.
  – Merit will then be processed in the pay period after it is entered in the system.
PITP Reporting

• Run the PITP Review query -

  UMB_CM_PITP_REVIEW

  – after you finish entering
  – on July 16\textsuperscript{th} after HR-Comp has completed their review

  – Query cannot be run after data has been loaded to job record on 7/17/14
PDP Rating Report

• If you would like a report with your employees’ PDP ratings that were submitted to HRS, please e-mail the request, including the department numbers needed, to:

   HRWeb@umaryland.edu

   By Friday, June 20th
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
    • Pay Increase Viewer
PITP Access - Non SOM

• 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 July 2\textsuperscript{nd} and July 13\textsuperscript{th}
PITP Access- SOM *New for FY15*

- Each SOM dept should have at least 1 person with UMB_PAYINC_INIT role
- All approvals will be done in the School of Medicine Dean’s office before July 14th
- Department initiators must be available to enter between July 2nd and July 9th
  - All merit entry by departments must be completed by COB on Wednesday, July 9th
  - If you finish entering merit early let Jim Airey know via e-mail so he can approve early- jairey@som.umaryland.edu
- Department initiators must be available on July 10th-11th to make changes if required by Dean’s office approvers
PITP Access- SOM New for FY15

• The UMB_PAYINC_APPROVE role will be removed from SOM department users and the UMB_PAYINC_VIEW role will be assigned to the former approvers

• Users with the VIEW role can look but not change

• Contact Jim Airey x6-2880 or Ron Powell x6-2607 with questions
PITP Roles

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

• **UMB_PAYINC_APPROVE (Approver)**
  – Can update Approve field

• **UMB_PAYINC_VIEWER**
  – Can view PITP pages but not update any fields
PITP Access

• If you need to 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:

If you need to change roles in your department you must submit a new eUM HRMS User Authorization form by Fri 6/27

http://www.umaryland.edu/cits/communications_forms/forms/
PITP Defaults

• Data in the PITP will include all employee information entered by HRSC through June 30th

• PITP will be loaded on Tuesday, July 1st

• All eligible comp rates for all eligible employee classes will appear on the PITP and will be defaulted to an approved status=No

• Employees hired/rehired after 12/1/13 will not be loaded to PITP
PITP Defaults

• Actions for Pay increase initiators:
  – Non-Exempt
    • Meets Standards is defaulted to 2.5% and only approval is required
    • Change NEX employees with Unsatisfactory, Below Standards, Above Standards, or Outstanding PDP ratings to appropriate % and rating
  – Exempt
    • Enter % for all EX employees based upon PDP ratings and/or as prescribed by Dean or VP
    • Change PDP rating field for EX employees with Unsatisfactory, Below Standards, Above Standards, or Outstanding PDP ratings to appropriate rating
  – Faculty
    • Enter $ amount based upon Dean or VP guidelines
    • SOM- FTE adjustment may be changed related to Merit increase only
PITP *New* Data Field

- A new field for the PDP rating has been added for staff empl classes (20 and 33)
- The initiator must select the appropriate overall PDP rating from the 3/31/14 PDP on file with HRS-ELR
  - Meets standards will default for all staff employees
  - Not Applicable will default for all others
PITP Eligibility Exceptions

• Types of eligibility exceptions that may require action:
  – Post Docs on NRSA grants- no merit permitted
  – Regular staff and faculty with wrong comp rate codes that require corrections
  – Unprocessed terminations
  – Pre-7/1/14 employee actions

• Changes to PITP require supporting documentation be submitted to HR-Compensation
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
Using the PITP - Initiator

• Sample view for Pay Inc Initiator- 33 Exempt Regular (FY14 version)

UMB Performance Rating field is inserted between Current Comp Rate and Change Amount fields on FY15 PITP
Using the PITP- Initiator

- **New** - all rows will be loaded to page (*used to be 10 at a time*)
- Initiator can change Elig Stat and Reason

### UMB Pay Increase Transaction

<table>
<thead>
<tr>
<th>Name</th>
<th>Empl ID</th>
<th>Empl Record</th>
<th>Effective Date</th>
<th>Empl Class</th>
<th>GFT</th>
<th>Std Hrs</th>
<th>New Standard Hrs</th>
<th>Current FTE</th>
<th>New FTE</th>
<th>Pay Incr Type</th>
<th>Seq Num</th>
<th>Elig Stat</th>
<th>Elig Override Reason</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bing, Chandler</td>
<td>524136</td>
<td>0</td>
<td>04/01/2014</td>
<td>33-ExmReg</td>
<td></td>
<td>40.00</td>
<td>40.00</td>
<td>1.0000</td>
<td>1.0000</td>
<td>Merit</td>
<td>1</td>
<td>Eligible</td>
<td></td>
</tr>
<tr>
<td>Bing-Geller, Monica</td>
<td>523732</td>
<td>0</td>
<td>04/01/2014</td>
<td>33-ExmReg</td>
<td></td>
<td>20.00</td>
<td>20.00</td>
<td>0.5000</td>
<td>0.5000</td>
<td>Merit</td>
<td>1</td>
<td>Eligible</td>
<td></td>
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<tr>
<td>Duffay, Phoebe</td>
<td>523277</td>
<td>0</td>
<td>04/01/2014</td>
<td>33-ExmReg</td>
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<td>40.00</td>
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<td>1.0000</td>
<td>1.0000</td>
<td>Merit</td>
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<td>Eligible</td>
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</tr>
<tr>
<td>Geller, Ross</td>
<td>504974</td>
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<td>04/01/2014</td>
<td>33-ExmReg</td>
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<td>40.00</td>
<td>1.0000</td>
<td>1.0000</td>
<td>Merit</td>
<td>1</td>
<td>Eligible</td>
<td></td>
</tr>
<tr>
<td>Green, Rachel</td>
<td>501230</td>
<td>0</td>
<td>04/01/2014</td>
<td>33-ExmReg</td>
<td></td>
<td>40.00</td>
<td>40.00</td>
<td>1.0000</td>
<td>1.0000</td>
<td>Merit</td>
<td>1</td>
<td>Eligible</td>
<td></td>
</tr>
<tr>
<td>Tribiani, Joe</td>
<td>502616</td>
<td>0</td>
<td>04/01/2014</td>
<td>33-ExmReg</td>
<td></td>
<td>40.00</td>
<td>40.00</td>
<td>1.0000</td>
<td>1.0000</td>
<td>Merit</td>
<td>1</td>
<td>Eligible</td>
<td></td>
</tr>
</tbody>
</table>
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

• Initiator can update the UMB Performance Rating field if necessary

• 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 increasing the UMB salary but 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
Specific Guidelines - SOM Faculty

- Fiscal Year FTE changes should not be entered on the PITP (*i.e. increases not related to merit*)
- EA/ePAF forms must be submitted for any FYC increases or decreases effective 7/1/14
- FYC actions will be processed after PP15-02
- If you have a significant decrease in FTE that will result in a large overpayment if not processed timely- it should be submitted to HRSC by June 24\textsuperscript{th} so that it can be processed ASAP
  - Conspicuously note on EA form that FTE decreased
Using the PITP- Approver

- Sample view for Pay Inc Approver

- FTE, Elig Stat, Elig Override Reason, UMB Performance Rating, 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 BEFORE s/he approves
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 by the department/SOM Dean’s office to YES for all employees before Monday, July 14th
  – Status is Eligible with Amount or Percent > 0 and Approved = YES
  Or
  – Status is Eligible with Amount or Percent = 0 and Approved = YES
  Or
  – Status is Ineligible and Approved = YES
Reminder- PITP Query

• The data from the PITP will be archived as soon as it is loaded to Job Data

• Run the query UMB_CM_PITP_Details if you want a copy of the data you entered **BEFORE** Thursday, July 17\textsuperscript{th}
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, July 17\textsuperscript{th}
Salary Change Communications

• We strongly encourage departments to send out notices to all employees identifying what the new salary is and how much the increase is—% and/or amount
Paycheck Communications

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

• PP# 15-01- Period 6/29-7/12/14- Payday 7/18/14
  – No changes to gross salary

• PP# 15-02- Period 7/13-7/26- Payday 8/1/14
  – New gross salary includes merit increase
  – Additional retro pay for period July 1st- July 12th
Paycheck results

• PP#15-03- Period 7/27-8/9- Payday 8/15/14
  – 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 and general merit questions
  – HRComp@umaryland.edu

• FS- Payroll- 6-1243
  – Retro pay questions
  – DL-BFPayrollHelp@af.umaryland.edu

• CITS- 6-HELP(4357)
  – Security/access questions
  – help@umaryland.edu
Questions or Comments on PITP Processing
Misc Payroll Topics

• Reminder from last week’s meeting
  – Intro to HRMS class is on-line only
  – Paper paychecks will be mailed starting in September

• “UMB Employee Funding Profile” renamed to “UMB EFP in Workflow” in menu

• PP#14-26 pay day is early due to holiday-Thursday, July 3rd

• Security audits coming
Misc Payroll Topics

• Compensation Overpayment policy & procedures - still in process
  – PR Reps and/or Dept Admins need to make sure that cost center/payroll register reports are run and analyzed EVERY pay period to prevent overpayments

• Timesheets
  – Termed employees can be updated
  – Concentrate on closed timesheets