UNIVERSITY of MARYLAND
THE FOUNDING CAMPUS

# 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

| Date | Action |
| --- | --- |
| June 24th | ePAF approval through Compensation (actions approved by Comp after this date will be processed post-merit) |
| June 24th | Paperwork must be in HR-Service Center for exceptions |

# Critical Dates

| Date | Action |
|---|---|
| July 1st | CITS loads data to PITP |
| **Non-SOM**:<br>July 2nd – July 13th | Department Pay Increase Initiators enter and Pay Increase Approvers approve |
| **SOM**:<br>July 2nd – July 9th | Department Pay Increase Initiators enter |
| **SOM**:<br>July 10th – July 13th | SOM Dean's Office approves |

# Critical Dates

| Date | Action |
|---|---|
| July 9th – July 16th | HR-Compensation Review and Approve |
| July 17th Early AM | CITS loads PITP to Job record |
| July 17th – July 18th | HR-Service Center EA Form entry |

# Critical Dates

| Date | Action |
|---|---|
| July 22nd | Payroll processing begins using new salaries with retro payments |
| July 22nd – July 25th | Dept PR Reps review cost center/payroll register reports |
| July 25th | Gross pay transmitted to CPB |
| August 1st | Pay day #15-02 |

# 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)

| 3/31/14 PDP Rating | Percent |
|---|---|
| Unsatisfactory or Below Standards | 0% |
| Meets Standards | 2.5% |
| Above Standards* | 2.75% |
| Outstanding* | 3.0% |

*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.

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

# Exempt New Salary Structure

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

| | Current | New |
|---|---|---|
| **Exempt - C Maximum** | $ 62,500.00 | $ 67,938.00 |
| **Example** | | |
| **ANNLEL** | $ 62,750.00 | $ 67,237.88 |
| **ANNLEL + 2.5% PDP** | $ 64,318.75 | $ 68,918.83 |
| **Lump Payout** | $ - | $ 980.83 |
| **New ANNLEL*** | $ 64,318.75 | $ 67,938.00 |

*** 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

# FY2015

## C2 (Employee Class 22 & 35) Merit Award Schedule

| Date of Hire | Contract End Date | Contract Renewal Date | 7/1/14 merit ex** | 7/1/14 merit applied ex** | 7/1/14 merit nex** | 7/1/14 merit applied nex** |
|---|---|---|---|---|---|---|
| **1/1/2013** | 12/31/2013 | **1/1/2014** | yes | 1/1/2015 | yes | 1/1/2015 |
| **2/1/2013** | 1/31/2014 | **2/1/2014** | yes | 2/1/2015 | yes | 2/1/2015 |
| **3/1/2013** | 2/28/2014 | **3/1/2014** | yes | 3/1/2015 | yes | 3/1/2015 |
| **4/1/2013** | 3/31/2014 | **4/1/2014** | yes | 4/1/2015 | yes | 4/1/2015 |
| **5/1/2013** | 4/30/2014 | **5/1/2014** | yes | 5/1/2015 | yes | 5/1/2015 |
| **6/1/2013** | 5/31/2014 | **6/1/2014** | yes | 6/1/2015 | yes | 6/1/2015 |
| **7/1/2013** | 6/30/2014 | **7/1/2014** | yes | 7/1/2015 | yes | 7/1/2015 |
| **8/1/2013** | 7/31/2014 | **8/1/2014** | yes | 8/1/2015 | yes | 8/1/2015 |
| **9/1/2013** | 8/31/2014 | **9/1/2014** | yes | 9/1/2015 | yes | 9/1/2015 |
| **10/1/2013** | 9/30/2014 | **10/1/2014** | yes | 10/1/2015 | yes | 10/1/2015 |
| **11/1/2013** | 10/31/2014 | **11/1/2014** | yes | 11/1/2015 | yes | 11/1/2015 |
| **12/1/2013** | 11/30/2014 | **12/1/2014** | yes | 12/1/2015 | yes | 12/1/2015 |
| **1/1/2014** | 12/31/2014 | **1/1/2015** | no | NA | no | NA |
| **2/1/2014** | 1/31/2015 | **2/1/2015** | no | NA | no | NA |
| **3/1/2014** | 2/28/2015 | **3/1/2015** | no | NA | no | NA |
| **4/1/2014** | 3/31/2015 | **4/1/2015** | no | NA | no | NA |
| **5/1/2014** | 4/30/2015 | **5/1/2015** | no | NA | no | NA |
| **6/1/2014** | 5/31/2015 | **6/1/2015** | no | NA | no | NA |
| **7/1/2014** | 6/30/2015 | **7/1/2015** | no | NA | no | NA |
| **8/1/2014** | 7/31/2015 | **8/1/2015** | no | NA | no | NA |

# 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

# 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 2nd and July 12th will require **TWO EA** forms by June 24th
  - 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 16th 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 2nd and July 13th

# 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*

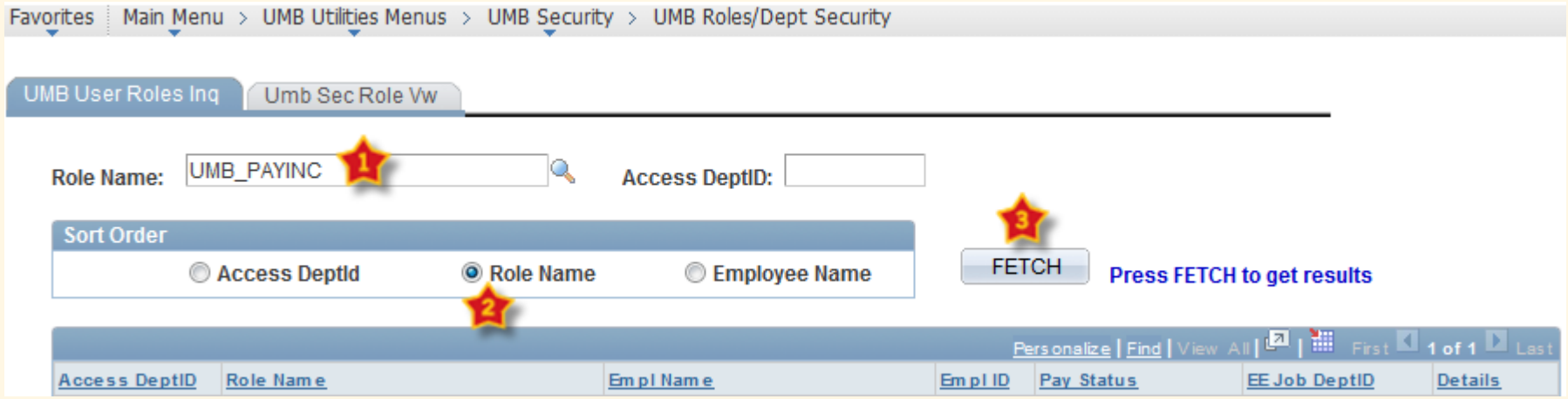
- The UMB_PAYINC_APPROVE role will be removed from SOM department users and the UMB_PAYINC_VIEW role will be assigned to the former approvers
- Users with the VIEW role can look but not change
- Contact Jim Airey x6-2880 or Ron Powell x6-2607 with questions

# 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:



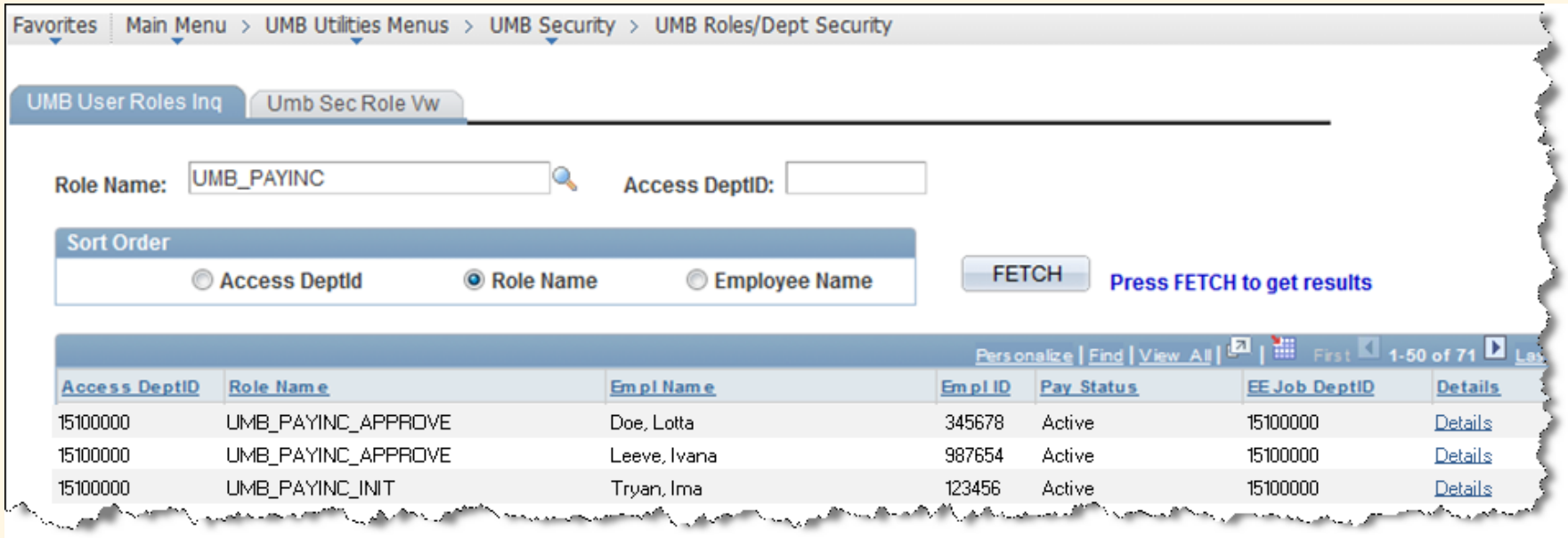

1- Enter UMB_PAYINC in Role Name field

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

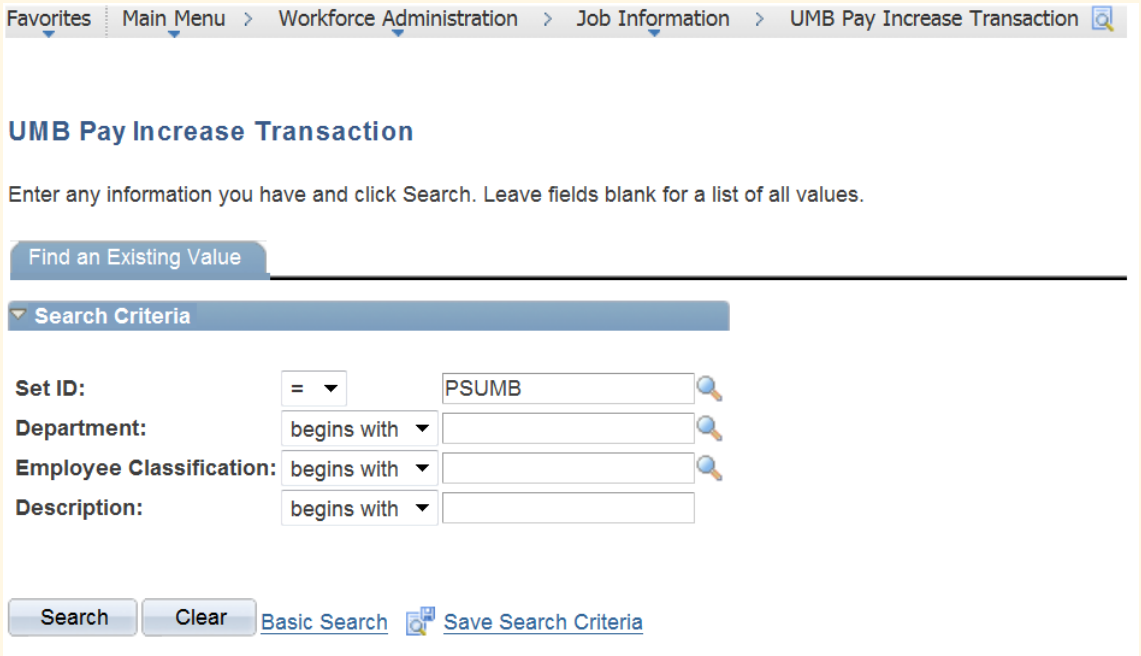
- A new field for the PDP rating has been added for staff empl classes (20 and 33)
- The initiator must select the appropriate overall PDP rating from the 3/31/14 PDP on file with HRS-ELR
  - Meets standards will default for all staff employees
  - Not Applicable will default for all others

# 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

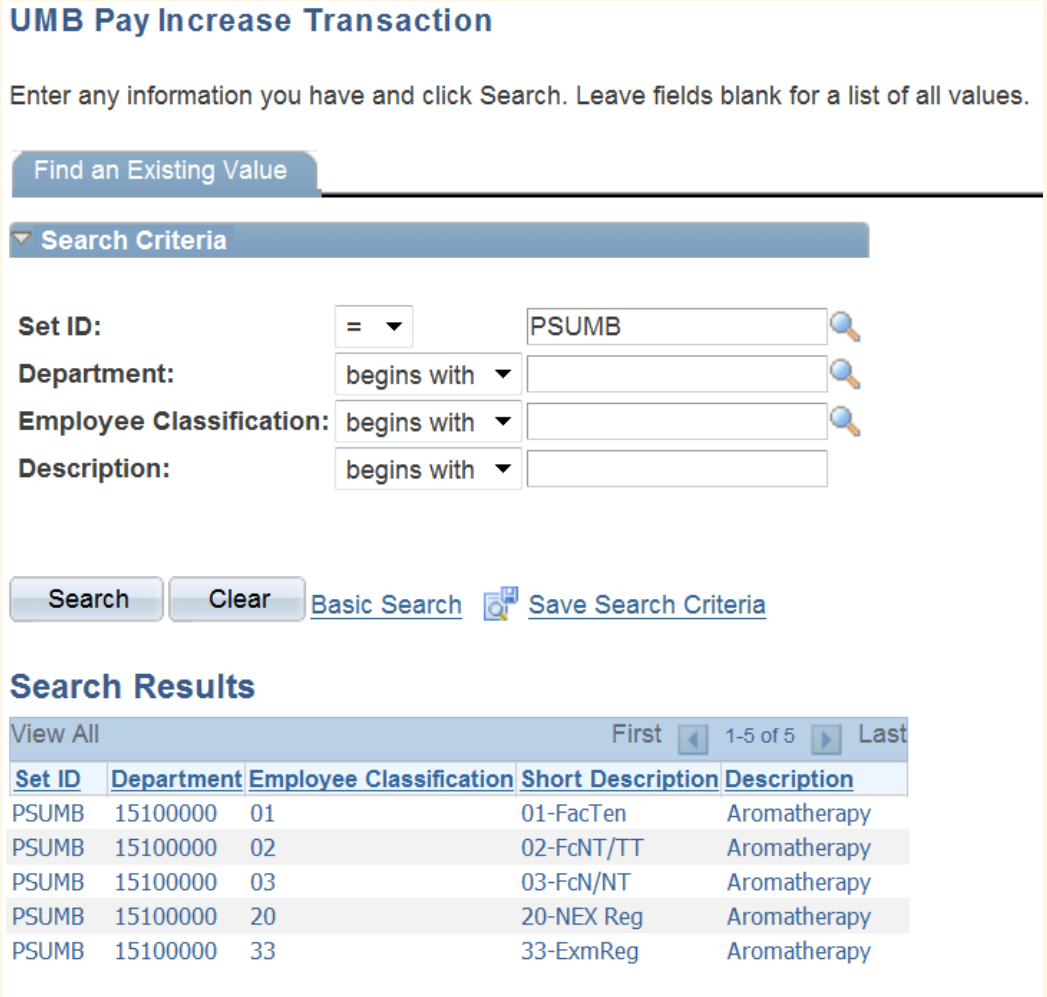
# Using the PITP- Init & Appr

- Main Menu> Workforce Administration> Job Information> UMB Pay Increase Transaction
- Data is processed by Dept and Empl Class



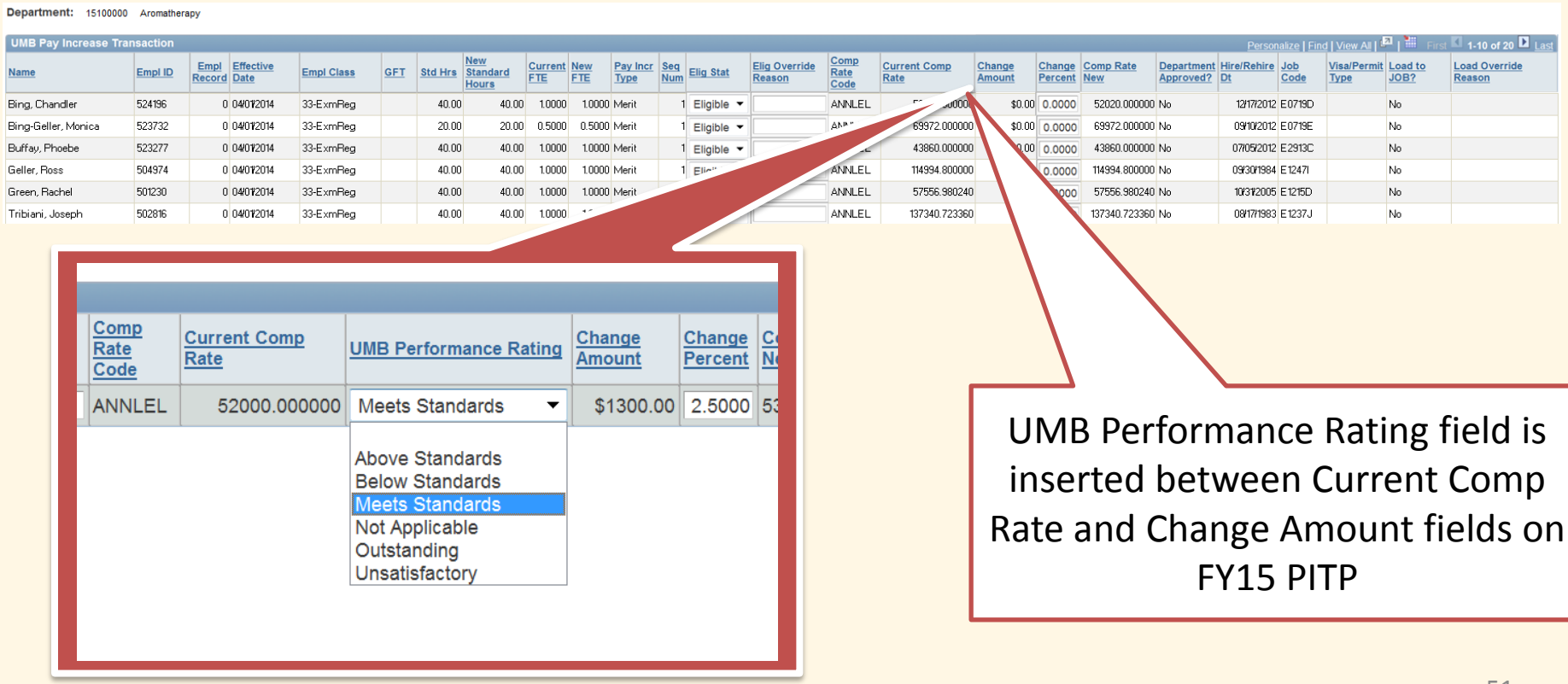
# Using the PITP- Init & Appr

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



# Using the PITP- Initiator

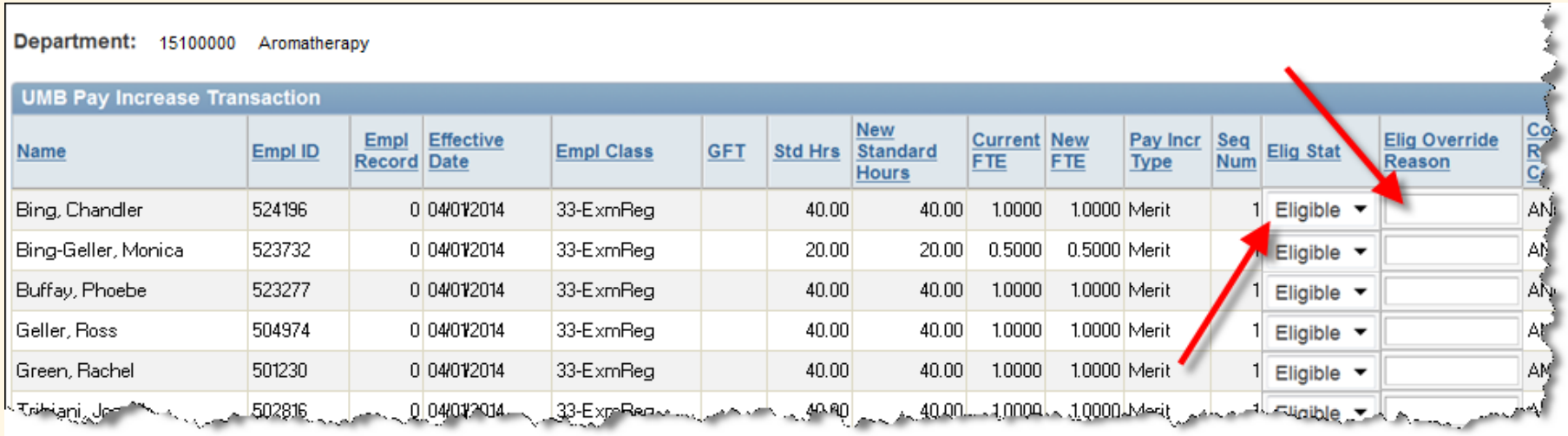
- Sample view for Pay Inc Initiator- 33 Exempt Regular *(FY14 version)*




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



**Department:** 15100000 Aromatherapy

**UMB Pay Increase Transaction**

| Name | Empl ID | Empl Record | Effective Date | Empl Class | GFT | Std Hrs | New Standard Hours | Current FTE | New FTE | Pay Incr Type | Seq Num | Elig Stat | Elig Override Reason | Co R C |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bing, Chandler | 524196 | 0 | 04/01/2014 | 33-ExmReg | | 40.00 | 40.00 | 1.0000 | 1.0000 | Merit | 1 | Eligible | | AN |
| Bing-Geller, Monica | 523732 | 0 | 04/01/2014 | 33-ExmReg | | 20.00 | 20.00 | 0.5000 | 0.5000 | Merit | | Eligible | | AN |
| Buffay, Phoebe | 523277 | 0 | 04/01/2014 | 33-ExmReg | | 40.00 | 40.00 | 1.0000 | 1.0000 | Merit | 1 | Eligible | | AN |
| Geller, Ross | 504974 | 0 | 04/01/2014 | 33-ExmReg | | 40.00 | 40.00 | 1.0000 | 1.0000 | Merit | 1 | Eligible | | AN |
| Green, Rachel | 501230 | 0 | 04/01/2014 | 33-ExmReg | | 40.00 | 40.00 | 1.0000 | 1.0000 | Merit | 1 | Eligible | | AN |
| Tribiani, Jo | 502816 | 0 | 04/01/2014 | 33-ExmReg | | 40.00 | 40.00 | 1.0000 | 1.0000 | Merit | 1 | Eligible | | AN |

# Using the PITP- Initiator

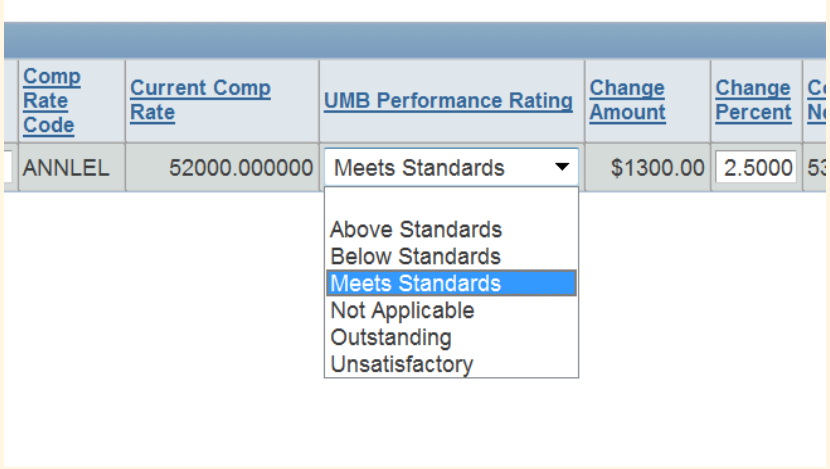
- Initiator can enter or override the Change Amount or Change Percent
- Department Approved and Load to Job columns are grayed out and set to No

Personalize | Find | View All | First 1-10 of 20 Last

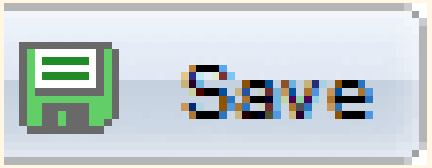
| Comp Rate Code | Current Comp Rate | Change Amount | Change Percent | Comp Rate New | Department Approved? | Hire/Rehire Dt | Job Code | Visa/Permit Type | Load to JOB? | Load Override Reason |
|---|---|---|---|---|---|---|---|---|---|---|
| ANNLEL | 52020.000000 | $0.00 | 0.0000 | 52020.000000 | No | 12/17/2012 | E0719D | | No | |
| ANNLEL | 69972.000000 | $0.00 | 0.0000 | 69972.000000 | No | 09/10/2012 | E0719E | | No | |
| ANNLEL | 43860.000000 | $0.00 | 0.0000 | 43860.000000 | No | 07/05/2012 | E2913C | | No | |
| ANNLEL | 114994.800000 | $0.00 | 0.0000 | 114994.800000 | No | 09/30/1984 | E1247I | | No | |
| ANNLEL | 57556.980240 | $0.00 | 0.0000 | 57556.980240 | No | 10/31/2005 | E1215D | | No | |
| ANNLEL | 137340.723360 | $0.00 | 0.0000 | 137340.723360 | No | 08/17/1983 | E1237J | | No | |

# Using the PITP- Initiator

- Initiator can update the UMB Performance Rating field if necessary

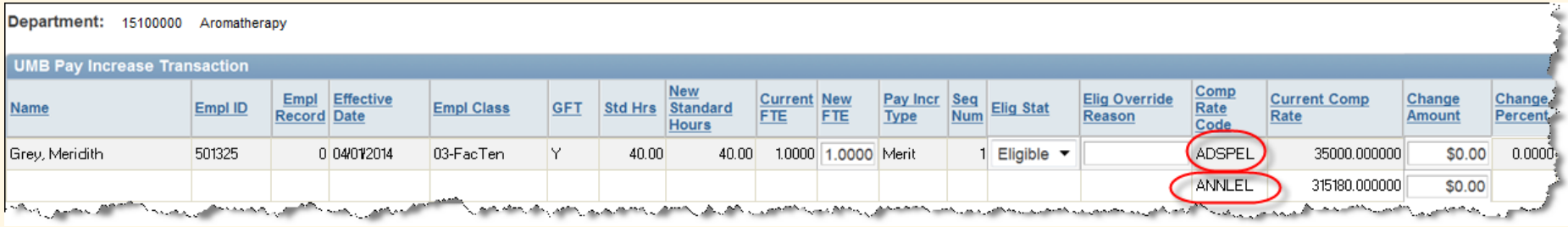



- Don’t forget to click the SAVE button when you finish entering!



# Using the PITP- Initiator Samples

- Faculty with ADSPEL- appears on PITP

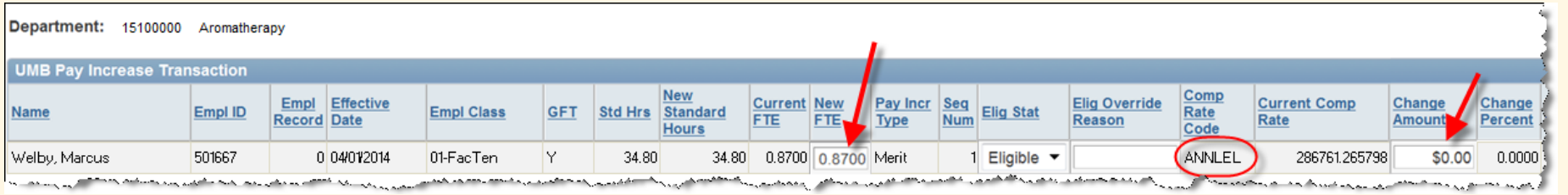


**Department:** 15100000 Aromatherapy

**UMB Pay Increase Transaction**

| Name | Empl ID | Empl Record | Effective Date | Empl Class | GFT | Std Hrs | New Standard Hours | Current FTE | New FTE | Pay Incr Type | Seq Num | Elig Stat | Elig Override Reason | Comp Rate Code | Current Comp Rate | Change Amount | Change Percent |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Grey, Meridith | 501325 | 0 | 04/01/2014 | 03-FacTen | Y | 40.00 | 40.00 | 1.0000 | 1.0000 | Merit | 1 | Eligible | | ADSPEL | 35000.000000 | $0.00 | 0.0000 |
| | | | | | | | | | | | | | | ANNLEL | 315180.000000 | $0.00 | |

- Faculty with ADSPIN- not on PITP



**Department:** 15100000 Aromatherapy

**UMB Pay Increase Transaction**

| Name | Empl ID | Empl Record | Effective Date | Empl Class | GFT | Std Hrs | New Standard Hours | Current FTE | New FTE | Pay Incr Type | Seq Num | Elig Stat | Elig Override Reason | Comp Rate Code | Current Comp Rate | Change Amount | Change Percent |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Welby, Marcus | 501667 | 0 | 04/01/2014 | 01-FacTen | Y | 34.80 | 34.80 | 0.8700 | 0.8700 | Merit | 1 | Eligible | | ANNLEL | 286761.265798 | $0.00 | 0.0000 |

- Note- the FTE field and Change Amount fields can be updated for faculty

# Specific Guidelines- **SOM** Faculty

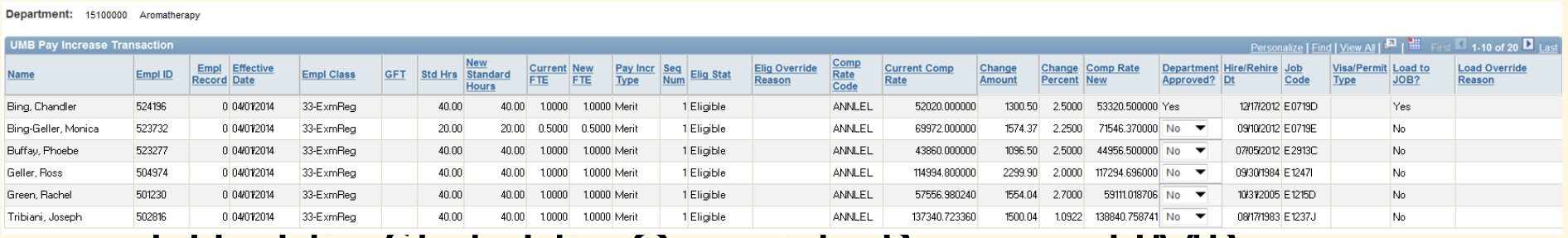
- Clinical Faculty-
  - If the annual salary is less than Total Approved Salary (TAS) then the FTE may need to be changed to reflect the percentage of TAS that is paid by UMB
  - FTE= UMB salary/TAS
  - FTE can be entered using up to 4 decimals
  - If you are not increasing the UMB salary but have increased 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 24th 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



**Department:** 15100000 Aromatherapy

**UMB Pay Increase Transaction** — Personalize | Find | View All | First 1-10 of 20 Last

| Name | Empl ID | Empl Record | Effective Date | Empl Class | GFT | Std Hrs | New Standard Hours | Current FTE | New FTE | Pay Incr Type | Seq Num | Elig Stat | Elig Override Reason | Comp Rate Code | Current Comp Rate | Change Amount | Change Percent | Comp Rate New | Department Approved? | Hire/Rehire Dt | Job Code | Visa/Permit Type | Load to JOB? | Load Override Reason |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bing, Chandler | 524196 | 0 | 04/01/2014 | 33-ExmReg | | 40.00 | 40.00 | 1.0000 | 1.0000 | Merit | 1 | Eligible | | ANNLEL | 52020.000000 | 1300.50 | 2.5000 | 53320.500000 | Yes | 12/17/2012 | E0719D | | Yes | |
| Bing-Geller, Monica | 523732 | 0 | 04/01/2014 | 33-ExmReg | | 20.00 | 20.00 | 0.5000 | 0.5000 | Merit | 1 | Eligible | | ANNLEL | 69972.000000 | 1574.37 | 2.2500 | 71546.370000 | No | 09/10/2012 | E0719E | | No | |
| Buffay, Phoebe | 523277 | 0 | 04/01/2014 | 33-ExmReg | | 40.00 | 40.00 | 1.0000 | 1.0000 | Merit | 1 | Eligible | | ANNLEL | 43860.000000 | 1096.50 | 2.5000 | 44956.500000 | No | 07/05/2012 | E2913C | | No | |
| Geller, Ross | 504974 | 0 | 04/01/2014 | 33-ExmReg | | 40.00 | 40.00 | 1.0000 | 1.0000 | Merit | 1 | Eligible | | ANNLEL | 114994.800000 | 2299.90 | 2.0000 | 117294.696000 | No | 09/30/1984 | E1247I | | No | |
| Green, Rachel | 501230 | 0 | 04/01/2014 | 33-ExmReg | | 40.00 | 40.00 | 1.0000 | 1.0000 | Merit | 1 | Eligible | | ANNLEL | 57556.980240 | 1554.04 | 2.7000 | 59111.018706 | No | 10/31/2005 | E1215D | | No | |
| Tribiani, Joseph | 502816 | 0 | 04/01/2014 | 33-ExmReg | | 40.00 | 40.00 | 1.0000 | 1.0000 | Merit | 1 | Eligible | | ANNLEL | 137340.723360 | 1500.04 | 1.0922 | 138840.758741 | No | 08/17/1983 | E1237J | | No | |

- 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

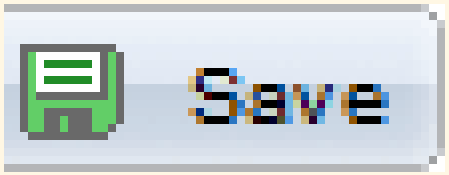
- Approver can only change Department Approved field- defaults to No and grays out when changed to Yes
- Load to job field matches Dept Approved field

Personalize | Find | View All | First

| New FTE | Pay Incr Type | Seq Num | Elig Stat | Elig Override Reason | Comp Rate Code | Current Comp Rate | Change Amount | Change Percent | Comp Rate New | Department Approved? | Hire/Rehire Dt | Job Code | Visa/Permit Type | Load to JOB? | Lo Rea |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 1.0000 | Merit | 1 | Eligible | | ANNLEL | 52020.000000 | 1300.50 | 2.5000 | 53320.500000 | Yes | 12/17/2012 | E0719D | | Yes | |
| 0.5000 | Merit | 1 | Eligible | | ANNLEL | 69972.000000 | 1574.37 | 2.2500 | 71546.370000 | No | 09/10/2012 | E0719E | | No | |
| 1.0000 | Merit | 1 | Eligible | | ANNLEL | 43860.000000 | 1096.50 | 2.5000 | 44956.500000 | No | 07/05/2012 | E2913C | | No | |
| 1.0000 | Merit | 1 | Eligible | | ANNLEL | 114994.800000 | 2299.90 | 2.0000 | 117294.696000 | No | 09/30/1984 | E1247I | | No | |
| 1.0000 | Merit | 1 | Eligible | | ANNLEL | 57556.980240 | 1554.04 | 2.7000 | 59111.018706 | No | 10/31/2005 | E1215D | | No | |
| 1.0000 | Merit | 1 | Eligible | | ANNLEL | 137340.723360 | 1500.04 | 1.0922 | 138840.758741 | No | 08/17/1983 | E1237J | | No | |

# 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

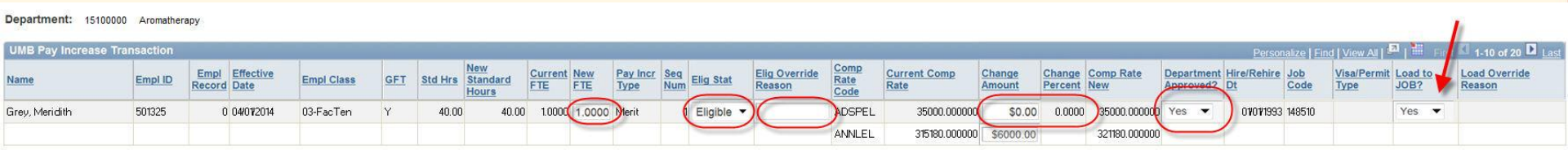
  - Status is Ineligible and Approved = YES

# 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 17th

# 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



**Department:** 15100000 Aromatherapy

**UMB Pay Increase Transaction** — Personalize | Find | View All | 1-10 of 20 | Last

| Name | Empl ID | Empl Record | Effective Date | Empl Class | GFT | Std Hrs | New Standard Hours | Current FTE | New FTE | Pay Incr Type | Seq Num | Elig Stat | Elig Override Reason | Comp Rate Code | Current Comp Rate | Change Amount | Change Percent | Comp Rate New | Department Approved? | Hire/Rehire Dt | Job Code | Visa/Permit Type | Load to JOB? | Load Override Reason |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Grey, Meridith | 501325 | 0 | 04/01/2014 | 03-FacTen | Y | 40.00 | 40.00 | 1.0000 | 1.0000 | Merit | 1 | Eligible | | ADSPEL | 35000.000000 | $0.00 | 0.0000 | 35000.000000 | Yes | 01/01/1993 | 148510 | | Yes | |
| | | | | | | | | | | | | | | ANNLEL | 315180.000000 | $6000.00 | | 321180.000000 | | | | | | |

# Using the PITP- HR Comp

**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 17th

# 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