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 <u>P</u>ayroll <u>I</u>ncrease <u>T</u>ransaction <u>p</u>age (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

Date	Action
April 8th	CITS loads data to PITP
Non-SOM: April 9th- April 20th SOM: April 9th-April 16th	Department Pay Increase Initiators enter and Pay Increase Approvers approve
SOM: April 17th- April 20th	SOM Dean's Office review

Critical Dates

Date	Action
April 9th- April 23rd	HR-Compensation Review and Approve
April 23rd overnight	CITS loads PITP to Job record
April 24th – April 28th	HR-Service Center manual entries if required

Critical Dates

Date	Action
April 29th	Payroll processing begins using new salaries with retro payments
April 29th – May 1st	Dept PR Reps review cost center/payroll register reports
May 2nd	Gross pay transmitted to CPB
May 9th	Pay day #14-22

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)- <u>departments</u> must change percent for those employees who are unsatisfactory, below, above, or outstanding

Specific Guidelines- Non-exempt

- Empl class 20 (Non-exempt Regular)

3/31/13 PDP Rating	Percent
Unsatisfactory or Below Standards	0%
Meets Standards	2.5%
Above Standards*	2.7%
Outstanding*	3.0%

*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 1st and April 19th 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 **I**ncrease **T**ransaction **P**age (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:

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 7th

- PITP will be loaded on Tuesday, April 8th

- All <u>eligible</u> comp rates for all <u>eligible</u> 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

Favorites | Main Menu > Workforce Administration > Job Information > UMB Pay Increase Transaction

UMB Pay Increase Transaction

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Search Criteria

Set ID: =   PSUMB
Department: begins with
Employee Classification: begins with
Description: begins with

Search   Clear   Basic Search   Save Search Criteria

Using the PITP- Init & Appr

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

UMB Pay Increase Transaction

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

▼ **Search Criteria**

Set ID:	= ▼	PSUMB
Department:	begins with ▼	
Employee Classification:	begins with ▼	
Description:	begins with ▼	

Search   Clear   Basic Search   Save Search Criteria

Search Results

View All   First ◄ 1-5 of 5 ► Last

Set ID	Department	Employee Classification	Short Description	Description
PSUMB	15100000	01	01-FacTen	Aromatherapy
PSUMB	15100000	02	02-FcNT/TT	Aromatherapy
PSUMB	15100000	03	03-FcN/NT	Aromatherapy
PSUMB	15100000	20	20-NEX Reg	Aromatherapy
PSUMB	15100000	33	33-ExmReg	Aromatherapy

Using the PITP- Initiator

- Sample view for Pay Inc Initiator- 33 Exempt Regular

| 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	$0.00	0.0000	52020.000000	No	12/17/2012	E0719D		No	
Bing-Geller, Monica	523732	0	04/01/2014	33-ExmReg		20.00	20.00	0.5000	0.5000	Merit	1	Eligible ▾		ANNLEL	69972.000000	$0.00	0.0000	69972.000000	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	$0.00	0.0000	43860.000000	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	$0.00	0.0000	114994.800000	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	$0.00	0.0000	57556.980240	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	$0.00	0.0000	137340.723360	No	08/17/1983	E1237J		No	
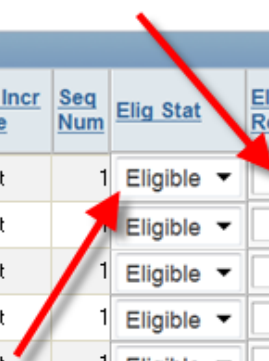
Using the PITP- Initiator

- Initiator can change Elig Stat and Reason

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 ▾		A
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 ▾		A

Department: 15100000 Aromatherapy

UMB Pay Increase Transaction

Using the PITP- Initiator

- Initiator can enter or override the Change Amount or Change Percent

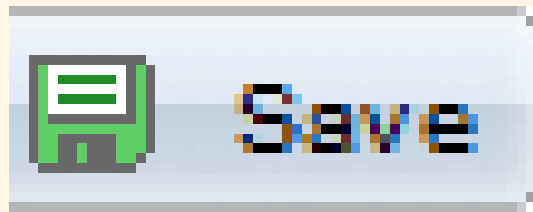- Department Approved and Load to Job columns are grayed out and set to No

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

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, 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

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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

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 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	

Personalize | Find | View All | First

Using the PITP- Approver

- Don't forget to click the SAVE button after entering approval!
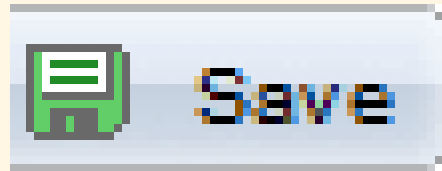
- Once the Approver has changed Department Approved? field to Yes <u>and</u> saved, then further changes cannot be made by the department
  - Contact HR-Comp if corrections are needed

Using the PITP- Approver

- Approved status should be set to YES for all employees by the department before Monday, April 21st (or before Thursday, April 17th for SOM)

  – Status is Eligible with Amount or Percent ≠ 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

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, 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