

Merit Template General Information and Instructions

GENERAL INFORMATION

The Merit Templates will be:

- Populated with FY09 BDL appointment data for merit eligible employees¹
- Created in Excel 2003 and distributed to Area Leads through RowdySpace²
- Area Leads will choose their own method of distribution within their assigned areas
- Area Leads will complete and return the templates to the Budget office. Signed originals will be delivered to the Budget Office, and an electronic version will be returned via RowdySpace no later than June 26, 2008³

Reclassifications/Promotions

If a merit eligible employee received a **reclassification**, which was final approved through Human Resources *before 3/28/08*⁴, the employee's new annual rate should have been reflected in the FY09 BDL. Please notify the Budget Office if you find discrepancies in your templates.

Employee Transfers

If a merit eligible employee with an appointment in the FY09 BDL **transfers**⁵ via promotion, job change, or reorganization to another department, please do not remove them from your merit template. Because the award of merit is retrospective and based on the prior supervisor's evaluation, please determine that employee's award as though they were still employed in your department, and indicate that the employee has **transferred** and their **new account number**⁶ in the Comments Section of the template.

Employee Termination/Separation

If a Merit Eligible Employee subsequently terminates their employment with UTSA^{7,8}, you should select the employee by placing your cursor on the employee name. Next, click the Vacate Button which will add the words vacate under the EID column only. This will allow you to perhaps retain the applicable merit for his/her replacement. In any case, the merit pool dollars will be retained by the department.

Classified Hourly Employees

Hourly employees who are merit eligible have been included on the Merit Templates.

¹ FY09 Merit Policy – Employee Eligibility, II

² Secure site accessible using UTSA network id/password

³ Due Date for both Electronic version and Original, Signed hard copy of Merit Templates

⁴ FY09 Merit Policy – Merit Pools, III-A

⁵ FY09 Merit Policy – Merit Awards, IV-C

⁶ AL1 in DEFINE

⁷ FY09 Merit Policy – Merit Awards, IV-G

⁸ Include use of merit award in comments – Reserved, or Re-allocated, etc.

Instructions

Template Data Entry

The merit templates require users to update three Columns⁹:

Location	Item	Input
Column L	Performance Evaluation	y = yes, n = no ¹⁰
Column Q	Merit Award	Numeric Amount of Award ¹¹
Column V	Comments	May be required ¹²

As the dollar amount of a merit award changes (Column Q), you will see the resulting Award % (Column R).

Special Features

- Merit Pool Validation
 - A status message has been added to warn if the Original Merit Pool rate in **Column P** and the Merit Applied in **Column Q are not balanced**. The message will return an **“out of balance”** warning message if there is a variance. All variances must be explained on each template. If a college elects to redistribute its Merit Pool allocation within its area, this will return an “out of balance” warning and must be explained at the unit level.
- Split Appointments
 - Care should be taken to ensure employees with split appointments receive merit awards according to merit policy guidelines.¹³
 - Column S on the Merit Templates will indicate if an employee has a split appointment. Contact your Area Leads for more details.
- Printed Templates
 - Columns A through F will be collapsed on the printed version for presentation

⁹ Account or appointment changes not in BDL should not be made on Templates., variance must be explained

¹⁰ FY09 Merit Policy – Employee Eligibility, II-D

¹¹ The default for this field “Amount of Award” is 3%. Departments determine the actual award

¹² Comments are required on Employee Transfers, Separations, and Reporting Changes/Inserts

¹³ FY09 Merit Policy – Merit Awards, IV-E