Merit Presentation

FY 2017 – 2018

July 13 & 14, 2017
Agenda – Merit Process

- Overview of the Merit Guidelines and Timeline
- Instructions for Templates
- Forms
  - Method of Distribution
  - Eligible Employee Award Letter
- SharePoint Space
- Announcements/Updates on Budget Office Website
- Template Demo
- Questions and Answers
Overview

Merit increase is a salary adjustment awarded to employees as recognition of their contribution to meeting the goals & objectives of the department, college and university during the previous year.

- **Based on evaluation of performance for the respective position and job requirements**
- **Subject to approval of the FY 2018 operating budget by the UT System Board of Regents**

- Each division may have a different internal process as long as ‘rules’ outlined in guidelines are met.
- For **Educational & General (E&G)** funded positions, funding to cover merit awards will be allocated from central budget sources.
- The cost of merit awards for employees paid from non-E&G sources must be covered by those fund sources.
- New salary resulting from a reclassification / job change after May 31, 2017, will need to be handled outside of the merit process.
Employee Eligibility

- Hired on or before September 1, 2016
- Benefits eligible – full or part time, 50% or greater
- Must be employed, as of the merit effective date September 1, 2017, to receive the base salary adjustment
- Student titled positions are ineligible (includes GRA’s and GTA’s)
- All staff employees (A&P and Classified) must have a current performance appraisal on file with Human Resources
- All employees required to complete the Compliance Acknowledgement (ACK) Training must be current on their training.
- Benefits eligible non-tenure track faculty may have specific requirements established by the Provost
Merit Award Process/Rules

- HR provides general award guidelines and instructions

  Actual method of distribution, as determined by each area, must be approved by HR prior to submission of templates to Budget Office.

  Form: Merit Distribution Methodology 2017-2018

- No min or max percentage is specified, but the total allocation to each area may not be exceeded or supplemented with departmental funds.
Merit Pools

Merit pool is based on:

2% of annual salary rate of eligible employees as of May 31, 2017

Employees are separated by faculty tenure track, non-tenure track faculty, classified and A&P, then grouped by division, college or department.

- Faculty allocations must be used only for faculty positions.
- A&P allocations can be redistributed to classified, but not vice-versa.

Overall pool amount by fund may not be supplemented or exceeded.
Source of Funds for Merit

Remember… Source of Funds for Merit

• Education & General (E&G) Funds (2100) are funded from central budgeted sources.

• Non-E&G funded positions (including E&G funds 2110 and 2115) that receive merit are covered from the fund source assigned to the position the date merit is paid.

• Grants & Contracts (5XXX funds) will be awarded merit pay if the grant or contract allows such to be funded.

• Exceptions must be approved in advance by VPBA.

Budget Transfers

Transfers will be processed by Budget Office for E&G merit awards (2100 funds).

Non-E&G merit awards will require funding to be available in the Cost Centers/Project ID’s by September 1, 2017, for the FY 2018 Fiscal Year
## Merit Process Timeline 2018

<table>
<thead>
<tr>
<th>Activity</th>
<th>Assigned To</th>
<th>Dates</th>
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<tbody>
<tr>
<td>Training sessions for Area Leads</td>
<td>HR / BUDGET / PSSC</td>
<td>July 13, 2017 (Thurs) July 14, 2017 (Friday)</td>
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<tr>
<td>Send Templates to Area Leads; each division begins internal process</td>
<td>Budget</td>
<td>July 17, 2017 (Monday)</td>
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<tr>
<td>Area Leads finalize templates and return to the Budget Office</td>
<td>Area Leads</td>
<td>August 11, 2017 (Fri)</td>
</tr>
<tr>
<td>HR will update PeopleSoft for 9/1/2017 compensation rates including merit</td>
<td>PSSC/HR</td>
<td>August 28, 2017 (Mon) – September 8, 2017 (Fri)</td>
</tr>
<tr>
<td>Budget Office will process permanent transfers for E&amp;G cost centers</td>
<td>BUDGET</td>
<td>Permanent Transfers will be completed in September effective 9/1/2017</td>
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Budget Planning & Development Website

[utsa.edu/financialaffairs/budget/]

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Template Demo
QUESTIONS
Thank you!

The University of Texas at San Antonio

Financial Affairs

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