Merit Template Instructions
Permanent and One-Time Merit Award
Performance Period 2/1/11 – 1/31/12

**General Information**


- Merit Templates will be provided to Merit Area Leads via Rowdy Space (email link) on **Friday, June 22nd**.
  - Created in Excel 2003.
  - Populated with a 3% merit pool allocation for A&P, Faculty, and Classified. The pool allocations are calculated based on eligible employees’ salaries as of **May 31, 2012**. Data was captured from the HRMS system with 100% faculty buyouts shown in 14 accounts per Budget (BUD) System.
  - Templates are password protected except for columns marked ‘UPDATE.’
  - All merit eligible employees are included and categorized by Classified, A&P, and Faculty.
  - Direct reports to the President and Vice Presidents are reported on separate templates.
  - Employees funded by 26 accounts (Contracts & Grants) are reported on separate templates.
  - Provost Office will provide NTT (Non Tenure Track) templates to be completed by academic areas.

  - Delegation of Signature Authority
  - Method of Distribution
  - Eligible Employee Award Letter (Sample)
  - Template Instructions
  - Rowdy Space instructions
  - OPA instructions
  - Unit Hierarchy Report
  - Blank Merit Template

- Method of Distribution is to be completed and sent directly to HR **prior** to submitting the completed electronic and signed templates to the Budget office.

- Completed electronic and hard copy **signed** templates are due to the Budget Office no later than **Tuesday, July 24th** as noted in the Merit Award Timeline. **Refer to divisional timelines for earlier internal deadlines.**

**Step 1 – Review Data**

- Review populated data for all eligible employees per Merit Policy for accuracy.

- Templates **only** allow for data entry under columns marked ‘UPDATE.’ A blank template is available on the Budget Office website on an exception basis; however, please do not delete any columns. Completed templates must be returned to Budget office in same format as original template.

**Step 2 – Performance Evaluations and Ratings**

HR has approved the following:

- Update the column with each employee’s performance evaluation rating. Refer to legend on left bottom of template for A&P and Classified.

- Faculty Templates require the current annual evaluation rating in the column.
If an otherwise eligible employee has not received a performance evaluation, they will be ineligible to receive a merit award. Contact the Human Resources Office for questions regarding A&P and Classified and the Provost/Academic and Faculty Support Office for questions regarding Faculty.

**Step 3 – Split Appointments**
Employees with split appointments (a single position funded by more than one account) are denoted as a ‘Split (total #)’ under the Split appointment column. Employees with split appointments need to be coordinated *early* in the process to determine the merit increase percentage to be awarded as the percentage *MUST* be the same for each template. Add comments as needed to denote each department head has agreed to the same rate for the split appointments.

Budget will provide Merit Area Leads with a split appointment listing via Rowdy Space on Monday, June 25th to assist in coordinating with the other areas.

**Step 4 – Merit to Follow Transferred Employee / Revised Account if applicable**
An eligible employee who has moved to another position and/or department due to promotion, job change, or reorganization should NOT be removed or vacated from the original merit template for consistency.

- If an employee has transferred IN, coordinate with the employee’s former supervisor to attain the employee’s performance rating and merit dollars awarded in order to update template. Update template with employee’s performance rating and percent of merit awarded. The award of merit is retrospective and based on the prior supervisor’s evaluation, the employee’s merit award percentage is to be determined by the prior departmental manager/supervisor.
  - HRMS modify documents can only be processed by the unit owning the current position held by the employee.

- If an employee has transferred OUT of the department, coordinate with the employee’s new supervisor to attain the new account number and add under the ‘Comments’ column. Update template with employee’s performance rating and merit percent awarded. The award of merit is retrospective and based on the prior supervisor’s evaluation, the employee’s merit percent award is to be determined by the prior departmental manager/supervisor.
  - HRMS modify document will need to be processed by the unit owning the current position held by the employee; therefore, coordinate and provide increase to new unit to process HRMS modify document, as appropriate.

**Step 5 – Termination/Separation**
A merit eligible employee listed on the merit template that is no longer employed with UTSA should be removed from the Merit Template by vacating the line item. Select the employee’s data row and use the Vacate Button located at the top of the template. This action will insert ‘Separated’ preceding the employee name. Once the employee has been vacated, you cannot undo the action (contact the Budget Office for assistance).

Next, update the employee’s merit award to zero percent. The merit pool dollars may be reallocated by increasing percentages of other awards.

**Step 6 – Revised % Time**
Notate any changes to an employee’s time base under the ‘Revised % TIME’ column.

**Step 7 – Enter the % Award of merit for each employee**
The template is automatically populated with a 3% award for each employee; override this percent number with the correct percent in the Percent Award column. Unlike past years, this year’s merit will be awarded as follows: (a) one-third will be processed as a base salary adjustment effective September 1, 2012 and (b) the remaining two-thirds will be paid in a lump sum on or around December 1, 2012.
Once the % Award is entered the template will automatically compute the Total Annual Value of the award as well as the corresponding award dollars for (a) amount applied to base salary and (b) one time lump sum award.

**Step 8 – Balance Amount - Sign the Forms - Return Electronic and Signed Copy**
Verify the Balance shown is zero. If the template is out of balance, add a detailed explanation in the Variance Explanation field. You cannot overspend the allocation provided to your division/area, although pool amounts can be shared amongst a group of departments.

Merit pool dollars may **NOT** be allocated across fund groups (i.e. 14 account merit pool dollars cannot fund merit awards in 19 accounts).

**Final Steps:**
Send signed completed hard copy and electronic version templates to your Merit Area Lead who will review templates and coordinate submittal to the Budget Office by the specified deadlines or sooner.

Area Leads will send original signed Method of Distribution form to HR and a copy of the form to the Budget Office along with completed signed templates.

Area Leads will save Electronic templates with file name to include ‘CMPL’ (as complete) when uploading final templates to Rowdy Space for Budget Office.

**Funding Available to Departments**
Transfers to fund E&G merit awards (14 accounts; excluding 14 F&A accounts) will be processed by the Budget Office beginning **August 24th** and no later than **September 14th**. Budget Office will notify the area lead by email upon completion of the E&G merit transfers into accounts. One third of the awards will become permanent budget and two-thirds will be one time funding.

Funding for Non-E&G merit awards will require funding available to meet the **September 7th** deadline for HRMS merit processing – please contact Area Lead if you have any questions.

***HRMS Processing Deadline by Departments***
Once the templates are received and reconciled by the Budget Office AND approved by Human Resources, the transfer of funds will be completed and HRMS modify documents can be forwarded for approval. HRMS modify documents need to reach the HR office for final approval by the due date of **September 7th**. This is to ensure merit awards effective **September 1st** are included with the payroll pull for **October 1st** paycheck.

For additional merit questions contact:
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