Merit Template Instructions
Permanent Merit Award
Performance Period 2/1/14 – 1/31/15

General Information


- Merit Templates will be provided to Merit Area Leads via a SharePoint site with email link to be provided on Friday, July 24.
  - Created in Excel 2007.
  - 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, 2015. Data was captured from the PeopleSoft 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 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
  - SharePoint 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, August 18, 2015, as noted in the Merit Process 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 for additions that are needed to existing templates; 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:

- Employee Performance Ratings have been pre-populated for those evaluations that have been completed. You will need to update the column with employee’s performance evaluation rating if the field is blank. 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 employee has not received a performance evaluation, they will not be eligible to receive a merit award. New for this year, all employees that are required to complete the Compliance Acknowledgement (ACK) Training must be current on their training. Vice Presidents receive a monthly list of employees who are non-compliant. 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 ’2’ under the Split Job column and the compensation is already reflected as the distributed amount. The same merit percentage must be assigned to each distributed amount for the one position. In a few cases the notation reflects an eligible primary and secondary position (two different position numbers) held by an employee. In this case there can be different merit percentages assigned to each position. 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 SharePoint on Friday, **July 24, 2015** 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.

- 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.

**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 – 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. This year’s merit will be awarded as a base salary adjustment effective **September 1, 2015**.

Once the % Award is entered, the template will automatically compute the Merit Award, New Base Salary and Base Increase amounts.
**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., 21XX fund merit pool dollars cannot be used for merit awards in 32XX funds).

**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 (21XX funds; excluding 21XX F&A accounts) will be processed by the Budget Office after **September 1** as a permanent transfer. Budget Office will notify the area lead by email upon completion of the E&G merit transfers into accounts.

Funding for Non-E&G merit awards will need to be processed no later than **September 25** – please contact Area Lead if you have any questions.

For additional merit questions contact:

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