Merit Presentation

FY 2015 – 2016

July 22 & 23, 2015
Agenda – Merit Process

- Overview of the Merit Guidelines and Timeline
- Instructions for Templates
- Forms
  - Signature Delegation of Authority
  - Method of Distribution
  - Eligible Employee Award Letter
- SharePoint Space
- Announcements/Updates on Budget Office Website
- 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 2016 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, 2015 will be increased by the flat dollar amount of the FY 2016 merit award not the percentage of merit awarded.
Employee Eligibility

- Hired on or before February 28, 2015

- Benefits eligible – full or part time, 50% or greater

- Must be employed as of the merit effective date September 1, 2015 to receive the base salary adjustment

- Student titled positions are ineligible (includes GRA’s and GTA’s)

- Classified and Administrative & Professional (A&P) staff must have a current performance evaluation on file with Human Resources - certification by President Romo is required.

- All employees required to complete the Compliance Acknowledgement (ACK) Training must be current on their training.

- Faculty have specific requirements established by the Provost
Merit Pools

Merit pool are based on:
3% of annual salary rate of eligible employees as of May 31, 2015

Employees are separated by Faculty, Classified & A&P, then grouped by division, college or department.

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

Overall pool amount by fund may not be exceeded.
Merit Award Process/Rules

- HR provides general award guidelines and instructions

  *Actuals 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 2015-2016

- No min or max % is specified but the total allocation to each area may not be exceeded or supplemented with departmental funds.
Source of Funds for Merit

Remember... Source of Funds for Merit

- Education & General (E&G) Funds (21xx) are funded from central budgeted sources.
- Non-E&G funded positions 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 (21XX funds)

Non-E&G merit awards will require funding to be available in the Cost Centers/Project ID’s by September 1, 2015 for the FY 2016 Fiscal Year
## Merit Process Timeline 2016

<table>
<thead>
<tr>
<th>Activity</th>
<th>Assigned To</th>
<th>Dates</th>
</tr>
</thead>
<tbody>
<tr>
<td>Training Sessions for Area Leads</td>
<td>BUDGET / HR / PSSC</td>
<td>July 22 (Wed) &amp; July 23 (Thurs)</td>
</tr>
<tr>
<td>Templates sent to Area Leads; Area Leads distribute templates within their areas; each division begins internal process</td>
<td>BUDGET</td>
<td>July 24 (Fri)</td>
</tr>
<tr>
<td>Templates due to Budget Office (Excel files)</td>
<td>Area Leads</td>
<td>August 18 (Tues)</td>
</tr>
<tr>
<td>Final approve all Salary Updates</td>
<td>HR</td>
<td>All salary merit updates will have September 1 effective date</td>
</tr>
<tr>
<td>Process Funding transfers for E&amp;G accounts</td>
<td>Budget</td>
<td>After September 1 as Permanent Transfer</td>
</tr>
</tbody>
</table>
Budget Planning & Development Website
http://www.utsa.edu/financialaffairs/budget/

Budget Office Contacts:
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Human Resource Office Contacts:
Bruce Tingle ext. 4651
Denise Moore ext. 5916
Catina Rover ext. 4259
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Questions

Thank You!