General FAQs - Managers Addendum

Please acquaint yourself with the General FAQ's before reviewing the Managerial Addendum.

1. **How are the merit distribution awards collected and entered into the payroll system?**

   Each year in April, supervisors and managers determine and submit merit levels using the ACHIEVEonline performance management system. This is referred to as the "Merit Level Task". Once a merit program has been approved for the year by UCOP, department administrators work with their respective leadership teams to determine and submit merit increases using ACHIEVEonline. This is referred to as the "Merit Distribution Task". Once the merit amounts are submitted, HR will review and load into the payroll system. Visit hr.uci.edu/partnership/merit/ for the administrative timeline.

2. **What is the 2019 One-Time STAR Program Fund and how will it be distributed?**

   In recognition of the many contributions of the non-represented staff to UCI, a one-time STAR Program fund of 1% will be established for non-represented employees in 2019. Managers will recommend awards in accordance with the STAR Program using the STAR Nomination Form. The eligibility criteria, guidelines and process for submitting a STAR award from the One-Time Fund can be found at hr.uci.edu/partnership/merit/. Once approved by both department leadership and HR, the proposed awards will be submitted with merits using ACHIEVEonline. This special one-time fund will be centrally funded and distributed with merits.

3. **What if organizational changes occur after the Merit Distribution Task is released? Will it be updated with the changes?**

   No, the Merit Distribution Task will not be updated once it is released. Contact your HR Business Partner with changes or ACHIEVEonline@uci.edu with corrections.

4. **How is the merit budget calculated?**

   The merit increase budget for each organization is calculated by multiplying salaries of eligible employees by the 3% budget allocation as directed by UCOP.

5. **At the campus, some employees are paid from select campus core funds and some are paid from other funds. How will this impact the distribution of the merit fund?**

   The Merit Distribution Task at the campus will separate employees who are paid from select campus core funds (19900, 19924, 20000, 68478 and 69750 - Sub 1) from employees who are paid from other funds, so these sources are not co-mingled. Increases for employees who are paid from these select campus Sub 1 funds will be covered centrally unless a Control Point exceeds its official merit funding target. Staff must remain on Sub 1 in the select campus core funds through the automated funding process (expected in July/August 2019). Additionally, KBM (Kuali Budget Module) staffing lists should be balanced and permanent budgets need to be solvent. Increases for employees who are paid from other funds will be covered by their respective funding source (e.g., auxiliary fund, contract or grant).

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6. Are vacant positions included in the merit distribution process?

No.

7. Can we make changes to an employee's appointment including changes to salary before July 1, 2019?

Employee appointment changes that result in salary change such as reclassifications, promotions and equity adjustments may occur before July 1, 2019 but may not be entered into the payroll system while the merit program is being processed. To ensure a smooth process, the payroll system will be closed to any payroll changes. This will include fund changes at the campus, as well. The information contained in the Merit Distribution Task must match the information contained in the employee data base, otherwise, increases may not load to payroll properly. For information regarding when this moratorium will be in effect, visit hr.uci.edu/partnership/merit/ for administrative timeline.

8. **How will employee appointment changes that were on hold due to the moratorium be entered into the payroll system?**

If the effective date of the change precedes the July 1 merit increase effective date, the merit increase will have to be removed, the change will be entered, and then the merit increase must be re-entered. At the campus, the departments will enter the changes. At the medical center, HR will enter the changes.

9. Is it true that check-ins must be completed in ACHIEVEonline before merit can be awarded?

No, while managers are encouraged to use the information captured in ACHIEVEonline to support merit decisions for their employees, it is not a requirement. However, merit is performance based and requires supporting narrative to back the merit level selected by the manager for the employee.

10. How will management ensure that merit levels and merit awards are determined consistently within their school/division/department?

Before the Merit Distribution Task is released to each organization, leaders, supervisors and managers will review the UCI merit criteria that is to be used to determine merit levels and merit awards. Once merit levels and merit awards are determined, leadership will meet to "calibrate" the decisions. During calibration, merit levels and merit increase amounts are discussed and compared to ensure consistency and transparency. For more information regarding the calibration process, visit hr.uci.edu/partnership/merit and view the video entitled "How to Calibrate Merit Levels".

11. **Can equity be addressed with merit funds?**

No, merit funds may only be used to reward employee performance, they may not be used to address position in range, compression, market lags or other forms of equity. These concerns should be addressed in accordance with applicable local HR policies.

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12. Will an exception to the merit guidelines be allowed?

Yes, on a case-by-case basis. Requests for exceptions to the merit guidelines should be submitted in writing along with justification to your school/division/department leader. Exceptions approved by the leader will be sent to HR for additional review. Any exceptions to merit guidelines will need to reconcile to the 3% merit budget allocation.

13. What would be an example of an exception?

A hiring manager offers a candidate a higher salary than planned in order to secure their unique skill set; however, the higher salary causes compression amongst others in the department. As a result, the hiring manager tells the candidate that he/she will not receive an increase in July when merits are distributed. So, even though the employee is placed in the "On Target Performer" merit level, and the guidelines indicate that "On Target Performers" should receive between 2% and 3%, the employee receives 0%. This would be an exception to the merit guidelines and will require prior approval.

14. How will lump sum payments for employees with salaries at or near pay range maximum be funded?

The portion of the merit increase that exceeds pay range maximum will be paid as a lump sum payment and will be covered by the school/division/department. This applies to campus employees paid from the select campus core funds (19900, 19924, 20000, 68478 and 69750 – Sub 1), as well.

15. When are managers/supervisors expected to meet with their employees to inform them of their merit increases?

For the 2019 Merit Program, managers/supervisors will receive notification from HR in mid-August indicating that it is time to discuss merit increases with employees. Managers/Supervisors will then have approximately two weeks to discuss with staff and provide them with Merit Letters. Go to hr.uci.edu/partnership/merit/ for applicable administrative timeline.

16. Will a Merit Letter Template be available?

Starting in 2019, merit notification letters for employees will be generated from the ACHIEVEonline performance management system, so templates will not be provided.

17. Is additional assistance available regarding how to discuss merit distribution with employees?

Yes, visit hr.uci.edu/partnership/merit to view online training entitled "Communicating Merit Levels" or contact your Campus HR Business Partner, Health Sciences HR Business Partner, or Medical Center HR Business Partner .