6.14 STAFF MERIT INCREASE (SMRT)

Overview
The procedures described in this section are for implementing a merit increase for an employee. A merit increase can be defined as an advancement in step, range or grade, without a change in title.

Policy Summary
Typically, staff merits are processed through the Merit Call process and are entered into PPS by data entry.

However, you can use the SMRT bundle to process an approved merit increase for an eligible career employee whose increase was for some reason not processed through the Merit Call process.

Additionally, you may need to process a retroactive merit for an employee who became merit eligible through a reclassification.

The following conditions of employment will change as a result of the merit increase for the employee:

- Next Salary Review Date and Type Code-After receipt of the merit, the next salary review date will reflect annual merit eligibility for future Merit Calls.
- Salary-After receipt of the merit, the employees monthly or hourly rate of pay will increase.
- Step Placement-If employee is in a step-based title code, then the step placement after the merit will be changed to reflect placement within the salary range.

Before You Start
The employee’s eligibility has been validated. You may need to refer to the SHR Procedures Manual for guidance or the Merit Call received from SHR.

You have obtained the completed and approved Report of Salary Review Form or the Merit Recommendation Form from the recommending supervisor.

Notify the employee of the effective date of the merit and changes to their pay rate.

Use the Report of Salary Review Form or Merit Recommendation Form as your data collection document.

Data Entry
You will use the SMRT Bundle to process the merit increase. This bundle contains the following functions:

- EAPP (Appointments/Distributions).
- EPER (Personnel-Miscellaneous)

Accessing SMRT
1. Log on to the Payroll/Personnel System.
2. At the Next Func field, type EEDB and press Enter.
3. Type BUND and press Enter.
4. Type SMRT, employee ID number, and press Enter.
Completing the EAPP Function

THE EAPP (APPOINTMENTS / DISTRIBUTIONS) FUNCTION

Appointment Level Procedure

- A merit increase does not change the intent of the employees appointment, therefore you do not end the current appointment.

- After you update, the system will derive the annual rate/hourly rate to reflect the merit increase.

Distribution Level Procedure

1. End the current distribution effective the day before the merit increase is effective.

2. **F9 Jump** to the command line and use the “copy xx to xx” command to set up next available distribution.

3. Enter data in the following fields, as applicable:

- **Actions**

- **L**
  - Enter 7 for UCSC location number.

- **Acct**
  - Enter ‘organization’ FOAPAL number.

- **CC**
  - Enter cost center.

- **Fund**
  - Enter fund number.

- **PC**
  - Enter activity code (optional, not required).

- **Sub**
  - Enter 1 or 2 as applicable.

- **FTE**
  - Enter the percentage of the budgeted position which the distribution represents, if applicable. Full time FTE (100%) is entered as 1.00.

- **Dist %**
  - The anticipated percentage of time which is chargeable to the account/ fund after the merit increase. 100% is entered as 1.00.

- **Pay Beg**
  - Enter the date on which the merit increase is effective entered in the format: MMDDYY.

- **Pay End**
  - Enter the date on which the merit increase is effective entered in the format: MMDDYY. If indefinite, enter 999999.

- **Step**
  - If the employee is in the step-based title codes, then enter the new step placement after the merit increase has been implemented. Enter steps in the following format: 1.0, 1.5, 2.0, 2.5, 3.0, 3.5, 4.0, 4.5, 5.0 etc.

- **Rate/Amount**
  - Enter the monthly, hourly or by-agreement rate of pay in effect after the merit increase is implemented.
Completing the EPER Function

THE EPER (PERSONAL MISCELLANEOUS) FUNCTION

EPER Procedure

1. Enter data in the following fields, as applicable.

Next Salary Review Date Enter Next Salary Review Date to reflect the annual merit eligibility date for the employee after the receipt of the merit increase in the format: MMDDYY.

Next Salary Review Type Enter the appropriate type code. (Usually type code 2 or 3).

2. Press Enter to invoke range/value edits.

3. This is the last function in the SMRT bundle. Proceed to the Review Section.

DOS Enter REG for reg pay or the appropriate description of service for pay.

4. Press Enter to invoke range/value edits.

5. Press F11 Next Function to continue to the next function in the SMRT bundle.

The EPER (Personnel Miscellaneous) function appears.
Review

1. Use F10 Prev Func and F11 Next Func to navigate through the screens in the bundle.
2. Make sure you have completed all the required data elements.
3. Review all entered data for accuracy and consistency.

Updating the Employee Database

Press F5 Update to display the PAN Subsystem Notification Preparation screen.

Consistency Edits

If there are consistency edits, the Consistency Edit (ECON) screen is automatically displayed. Review all error messages and make necessary corrections.

How to Correct Consistency Errors

From the ECON screen you may:

- Correct errors directly on the ECON screen.
- F3 Return to the last data entry screen, make any corrections, then do one of the following:
  - Press F5 Update to invoke PAN.
  - Press F2 Cancel twice to cancel the update and leave the EDB unchanged.

See Consistency Edit Messages (ECON) in Section 1.6, System Messages in this manual for more information and instructions.

PAN Preparation

After pressing F5 Update from a data entry screen (if there are no consistency edits) or an ECON screen, you are automatically positioned at the PAN Comments Entry screen. From here you can add comments and additional reviewers to the PAN.

1. Add a description of the action and any significant details in the Comments Entry screen.
2. Press F10 NotfPrep to display the Notification Preparation screen, where you can add reviewers as desired.
3. Press F11 Detail to display the Activity Review screen, where you can review the notification before sending it.
4. Press F5 Update to complete the update and send the notification.

If the update is successful, the first function in the bundle appears and displays:

U0007 UPDATE PROCESS COMPLETE

For more information about PANs and additional PAN features, please refer to Section 1.8, Post Authorization Notification (PAN).

Accessing IMSG

1. To access the Message Report Screen go to the Next Function field, type IMSG and press Enter.
2. When the IMSG screen is displayed, review any remaining messages and take the appropriate action.

Disposition of Forms

- Forward the appropriate approval document to the mandatory reviewer.
- Forward the original merit recommendation form to SHR.
- Maintain a copy in the employee personnel file.