
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 (Action Code)	Enter Personnel Action Code 04 (Manual Merit Increase)
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 1.000.
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 expected to end 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..

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

Completing the EPER Function

THE EPER (PERSONAL MISCELLANEOUS) FUNCTION

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===== TN3270 - uccmvsb to host uccmvsb.ucop.edu =====
Session Edit Commands Settings Help
PPEPER0-E0943 SCT EDB Entry/Update 08/02/95 16:40:36
07/28/95 10:21:22 Personnel-Miscellaneous Userid: SCPPSLHB
ID: 222334444 Name: SLUG, B ANNA SSN: 222-33-4444 Pri Pay: MA

Assigned BELI: 5 Derived BELI : 6 Effective Date: 091694
BELI Status Qualifiers: Primary: ___ Date: ___ Secondary: ___ Date: ___
Date of Hire : 091694 Original Hire Date: ___
Employee Relations Code : E Employee Relations Unit: 99
Probationary Period End Date : ___
Next Salary Review Date : ___ Next Salary Review Type: _
Merit Rate Increase Percent : ___
Home Department : 000462 CROWN COLLEGE ADMIN OFFICE
Primary Title Code : 4920 ASSISTANT III
Employee Unit Code : CX Employee Representation Code : U
Employee Special Handling Code: 999 Employee Distribution Unit Code: _
Job Group ID : ___
Alternate Department Code : ___
Academic Programmatic Unit Cd : ___

Next Func: ___ ID: ___ Name: ___ SSN: ___

===>
F: 1-Help 3-PrevMenu 4-Print 5-Update
F: 9-Jump 12-Exit
===== IBM-3278-2-E 16:40:18 =====
    
```

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*.

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.