

Created on: May 1, 2006

Last modified on: August 18, 2006

**SR81447 Requirements
2006 Web Merit Enhancements, Phase II**

Objective:

To implement enhancements to the Web Merit online application, so that campuses may utilize the application to process October 2006 salary increases successfully.

Project Type:

This is a series of enhancements to an existing application, and a follow-up Service Request to SR 81451.

Requested by:

HR&B HR and Compensation Policy

Analyst:

Carrie Gatlin

Due Date(s):

The requested modifications are Date Mandated.

It is requested that the changes be made available to campuses so that they have adequate time to test and install the release prior to processing of October 2006 merit cycles.

Background

PPS release 1428, dated August 9, 2002, implemented the initial Web Merit system, a web-based online application to automate the processing of merit increases. A subsequent release (R1513) added new functionality to process across-the-board (ATB) cycles.

In 2005, UC Santa Barbara became the first campus to use the Web Merit system to process October merit increases for policy-covered (unit '99') employees. Other campuses, in particular UCLA and UC Riverside, tested the application extensively or ran the application in parallel with the existing batch merit process (PPP670).

After the October 2005 merit cycles were complete, HR&B ISS solicited feedback from those campuses which had implemented or tested the application, with the goal of identifying critical and high-impact modifications which would allow more locations to use the application. Please see SR 81451 for details on the modifications requested as part of "Phase I" of the 2006 Web Merit enhancement project.

Change Requirements

1.0 Application Level

1.1 Frequently Asked Questions

A new Frequently Asked Questions page should be developed for the Web Merit application. This FAQ page should be accessible from the principle 'navigation bar' present on each web page which contains links to the Main Menu, Merit Main Menu, and Logout.

A new link should be added to this navigation bar, labeled 'FAQ'. Clicking on this link should launch the Frequently Asked Questions page in a separate (pop-up) browser window. The Frequently Asked Questions page should contain the text content outlined in Attachment A.

2.0 Merit Menu

On the Merit Menu, the text page header and the HTML page title should be modified to read "Merit Menu". The font size of the page text should be increased by 1 point.

Please see Attachment B for suggested web page layout.

3.0 Merit Cycle Administration

3.1 Authorization Failure Error Message

When a non-authorized user (with MERITCTL or MERITDPT authorization) attempts to access the administration page, the system issues the following error message:

This page has been invoked without the validation of ARSM rules. Please go back to the menu and try to access this page.

The error message associated with this condition should be clarified to read:

You do not have access to the administrative section of the Web Merit application. Please return to the <a link to merit menu>[Merit Menu](#).

3.2 Merit Cycle List Sort

The merit cycles listed on the Merit Cycle Administration page should be displayed in ascending order by cycle ID.

3.3 PSS/MSP Program Type

On the Merit Cycle Definition and Merit Cycle Update screens, a new program type should be added:

PSM (Professional Support Staff / Management and Senior Professional)

This program type would define a merit or ATB cycle containing both PSS and MSP personnel program types (EDB 2007 values '1' and '2', excluding SMG titles) which meet the other specified eligibility criteria.

The Web Merit extract program should also be modified to support this new combined program type.

This new program type code and description should also be added to the Program Type help screen. On all screens where the Program Type options are displayed, the valid values should be displayed in alphabetical order.

4.0 Merit Input/Review

4.1 Roster Cycle List Page

On the Roster Cycle List page, the label for the "Submit" button should be changed to read "Open Roster".

In addition, the "Status" column header should contain a clickable Help link ('?'). When the user clicks on this Help link, the system should load the Cycle Status description list (DisplayStatusCode.jsp) in a popup window. It is noted that the Cycle Status description list is currently available as a Help option from the Merit Cycle Administration page.

Any 'Title Code Range' criteria entered for the cycle should be displayed on the Cycle Criteria popup page. See Attachment C for suggested web page layout.

4.2 Step-Based and Open-Range Rosters

4.2.1 Roster Input

On both the step-based and open-range rosters, if the cycle status is 'H' (Prelim Extract Open for HR), 'D' (Open for Department Review), or 'C' (Cycle Closed), the "Save Changes" and "Reset" buttons should not be displayed.

4.2.2 Roster Navigation

A new link should be added to the bottom of the roster page, as shown in Attachment D. The link, labeled "Back to Dept List", should lead the user back to the previously visited Roster Department Selection List page, from where the user accessed the current roster.

4.2.3 Title Code Detail Page

The Title Code name and rate effective date should be added to the Title Code Detail page, as shown in Attachment E.

4.2.4 Roster Instructional Text

If the roster is open for input (that is, cycle status is not 'H', 'D', or 'C'), instructional text should be added to the top of the roster page. The text should be specific to the type of merit or ATB cycle being displayed (step merit, open range merit, or ATB). Please see Attachment D for suggested page layout.

For step merit cycles:

Enter the evaluation date, the performance rating, and the recommended step increase. Click “Save Changes” at any time to save the data you have entered.

For open range merit cycles:

Enter the evaluation date and performance rating, then the annual increase *or* the percent increase. Click “Save Changes” at any time to save the data you have entered.

For step and open range ATB cycles:

Review the roster to verify that all eligible employees are included. Click on the employee name to review individual records and to remove any ineligible employees.

4.2.5 Additional Text Changes

The following text changes should be made to the roster page:

- The label for the “Submit” button should be changed to read “Save Changes”. In addition, a “tooltip” box should be generated when the user hovers the cursor over the button. The tooltip text should read: “Submit changes or new updates to the roster”.
- A tooltip box should be added to the “Calculate” button. The tool tip text should read: “Calculate new rates without saving changes”.
- The font size for the error message descriptions which appear at the bottom of the roster should be increased by 1 point.
- In the heading of the “Evaluation Date” column, the acceptable date format (MM/YY) should be added.
- The Cycle Date, translated Cycle Status, Monthly Effective Date, and Biweekly Effective Date should be printed at the top of the page, as shown in Attachment D.
- The Cycle ID at the top of the page should be a clickable link. Clicking on the Cycle ID should launch the Cycle Criteria page in a popup window.

5.0 Employee Detail

5.1 Data on Employee Detail

On the Employee Detail page, the Appointment Type Code (EDB 2020) should be added, as shown on Attachment F.

5.2 Button Labels

The labels for the “Save” and “Delete” buttons should be clarified to avoid user confusion. The label for the “Save” button should be changed to read “Save Comments”. The label for the “Delete” button should be changed to “Delete from Roster”.

5.3 Employee Deletion

5.3.1 Restore to Roster Functionality

Currently, when an employee is deleted from a roster, there is no mechanism for reversing the deletion and adding the employee back to the roster. Campuses have requested that this functionality be added.

If an employee has been deleted from the roster, the “Delete” button on the Employee Detail page should not be displayed. In its place, a new button labeled “Restore to Roster” should be displayed. When the user clicks on the “Restore to Roster” button, the employee record should be added back to the roster, **and the following message should be displayed on the Detail page:**

Employee record has been undeleted. Click ‘Save Changes’ or refresh the roster page to display the row as restored.

The “Delete” button should once again be displayed on the Employee Detail page, and the employee row should no longer be highlighted on the roster page. If the cycle is an ATB cycle type, than any previously calculated rate adjustment data should be restored and displayed on the roster. For merit cycles, any previously-entered merit data should not be restored to the roster.

5.3.2 Residual Data for Deleted Employees

When an employee record is deleted, there is residual merit data still displayed on the Employee Detail page and on the Roster page: the Employee Detail displays the New Rate, New Step, Cost, and FY Cost, while the Roster displays New Annual Salary and New Rate. This merit data should not be displayed for deleted employees. For ATB cycles, the data should be maintained on the database so that it may be displayed if the employee is restored to the roster. For merit cycles, the deleted merit data may be discarded entirely.

5.3.3 Delete Confirmation Message

Currently when an employee is deleted from the roster, the following message is displayed on the Employee Detail page:

Employee record marked as deleted. Click ‘Save Changes’ on the roster to refresh the page and display the row as deleted.

Because the ‘Save Changes’ button will no longer be available for certain cycle status values, the delete confirmation message should be modified to read:

Employee record marked as deleted. Click ‘Save Changes’ or refresh the roster page to display the row as deleted.

Attachment A - Frequently Asked Questions

Frequently Asked Questions

Merit Cycle Administration

[What is the difference between a merit and ATB cycle?¹](#)

[How do I make changes to the Performance Rating Table?](#)

Merit Rosters

[What are the error codes on the roster page?](#)

[Why can't I save changes to my roster?](#)

[How are an employee's multiple appointments displayed on the roster?](#)

[Why is an eligible employee missing from the roster?](#)

[When should I delete an employee from the roster?](#)

Merit Cycle Administration

What is the difference between a "merit" and "ATB" cycle?

A merit cycle requires that performance evaluation data be entered for each employee on the roster. An ATB cycle does not support performance evaluation data entry. A merit cycle also allows for preliminary extracts, where a full ATB cycle includes only a single final extract.

How do I make changes to the Performance Evaluation Table?

You can make changes directly to the Performance Evaluation Table from the Merit Administration screen. Select the cycle, click the "Performance Evaluation" radio button, and press the "Edit" button. You can then proceed to edit performance codes, delete codes, or add new codes.

After you have edited the Performance Evaluation Table, you must also update the Step Increase or Open Range Increase table to reflect any recent changes to the Performance Evaluation Table.

Merit Rosters

What are the error codes on the roster page?

The following error codes are generated on the roster page:

Code	Description
RNF	The new rate was not found in the TCT rate table.
RGC	The current rate is greater than the TCT rate.
RAM	Current/existing rate is already at maximum rate available in TCT.
RSM	New rate is more than the maximum available in TCT. Set new rate to the max available in TCT.
RLM	New rate is below the minimum in TCT.
ROM	New rate has been set above the maximum for the Title Code.

Why can't I save changes to my roster?

¹ Anchor link to question and answer further down on the FAQ page

If you are having difficulty saving changes to your roster, check for employee records on the roster that have been flagged with red error codes. Records where no rates were found for the Title Code ('RNF') will be flagged as errors, and will prevent you from saving the roster. To submit the roster, correct the errors and then click "Save changes" again.

If your cycle is defined to disallow increases over the maximum rate for a Title Code, records marked 'RGC' ('The current rate is greater than the TCT rate') will prevent you from saving the roster. You must correct these errors before submitting the roster.

If your cycle is defined to allow over maximum increases, employees with rates over the maximum allowed for the Title Code will be flagged as 'RGC' or 'ROM' ('New rate has been set above the maximum for the Title Code') but the application will save the roster and apply the increases.

How are an employee's multiple appointments displayed on the roster?

The Web Merit system includes functionality to collapse an employee's identical appointments and distributions into one single record on the merit or ATB roster, referred to as a "logical appointment". When the increase is applied for this record, the increase will be applied to the identical appointments and distributions as well.

If logical appointments are collapsed by Home Department, there will be one logical appointment record for any appointments and distributions which share the same Appointment Department, Title Code, Appointment Type, Salary Grade (at the appointment level), Appointment Rate Code, Appointment Pay Schedule, Appointment sub-location, Appointment Representation Code, Distribution Pay Rate, and Salary Step.

If logical appointments are collapsed by Appointment Department, there will be one logical appointment record for any appointments and distributions, within a single appointment department, which share the same Title Code, Appointment Type, Salary Grade (at the appointment level), Appointment Rate Code, Appointment Pay Schedule, Appointment sub-location, Appointment Representation Code, Distribution Pay Rate, and Salary Step.

You can view the individual appointments and distributions which make up the logical appointment by viewing the Employee Detail for a record.

Why is an employee missing from the roster?

If an employee's EDB data does not match the selection criteria for the cycle, the employee will not appear on the roster. To capture all eligible employees, correct EDB data inaccuracies during the preliminary extract, before performance review data is entered on the roster.

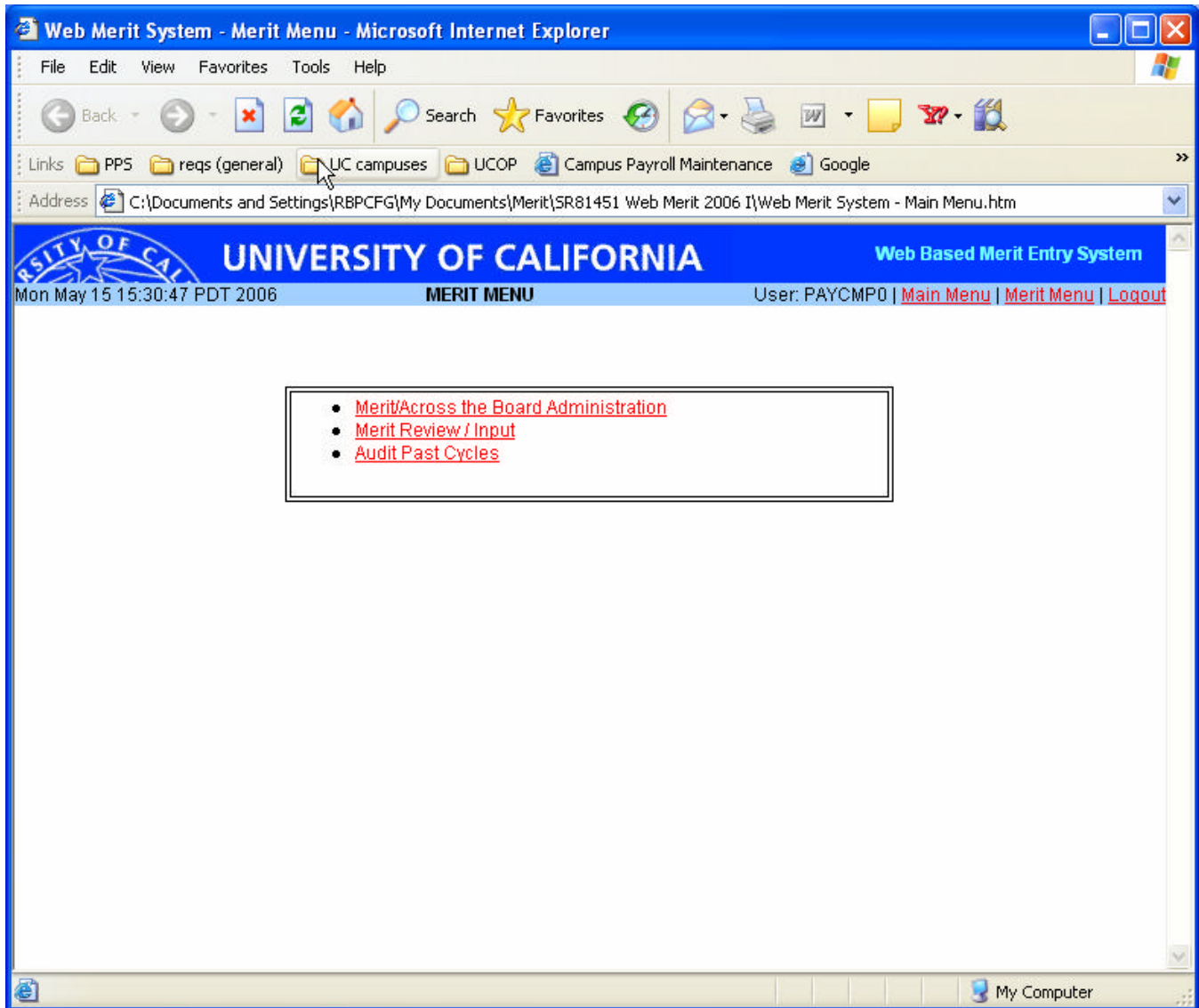
When should I delete an employee from the roster?

Deleting an employee from the roster should be a rare occurrence. If an ineligible employee appears on the roster, you may need to correct some data fields in the PPS to ensure that the employee does not appear on the next roster extract. Make all necessary corrections during the preliminary stage, before the final roster is extracted. If an ineligible employee still appears on the final roster extract, then it might be appropriate to delete the employee from the roster.

Eligible employees who are not receiving merits should remain on the roster so that funds generated by their presence are left in the pool of available dollars. This is important for balancing the total amount spent against the overall control figure.

[Close](#)

Attachment B - Merit Menu



Attachment C - Cycle Criteria Popup

Next Salary Review Date	01/06
Next Salary Review Code(s)	Six Month Increase Merit Increase Special Performance Award Trainee Increase
Appointment Type(s)	Contract Regular/Career Limited Partial year/Career
Oldest Performance Review	
Elig Criteria: Hire Date	
Elig Criteria: Probation Date	
Collective Bargaining Code	99
Appointment Representation Code	ALL
Biweekly Effective Date	03/01/06
Monthly Effective Date	03/01/06
Biweekly Reduction End Date	
Monthly Reduction End Date	
Control Percent	3.50
Remaining Fiscal Year Months	5
New Next Salary Review Date	01/07
Title Range	Limit to: 5313-5501 8632-8634

Close Window

Attachment D - Roster

Web Based Merit Entry System
⌵

Mon Apr 24 10:18:06 PDT 2006
MERIT ROSTER SELECTION
User: PAYCMP0 | [FAQ](#) | [Main Menu](#) | [Merit Menu](#) | [Logout](#)

RANGE BASED MERIT ROSTER: [CFG-MERIT-99](#)

Cycle Status: Prelim Extract Open for HR, Control Point Review
Cycle Date: 04/05 **MO Effective Date:** 05/01/05 **BW Effective Date:** 05/08/05

Enter the evaluation date and performance rating, then the annual increase *or* the percent increase. Click "Save Changes" at any time to save the data you have entered.

Name/ Employee ID	Title Code/Dept.Title Dept Desc.	Pay Sched./ Time%	Current Ann. Salary/ Rate	Grade	Eval. Date (MM/YY)	Perf. Rating	Annual Increase	Pct Incr.	New Annual Salary / Rate
STOCKTON, WILLIAM F 701000033	Z275 / 826301 SECURITY	MO 1.00	43800 3650.00		<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

[< Back to Roster List](#)

Attachment E - Title Code Detail

Title Code : 7275 PROGRAMMER/ANALYST III

Sublocation: MD Rep Code : C
Grade : 5 Effective: 10/01/2005
Cycle Date : 04/05

Minimum	Midpoint	Maximum
0051336.00	0071832.00	0092328.00

Close

Attachment F - Employee Detail Page

Web Based Merit Entry System

[Main Menu](#) | [Merit Menu](#) | [Logout](#)

Thu May 18 09:28:33 PDT 2006
MERIT ROSTER
User: PAYCMP0

RANGE BASED ROSTER
EMPLOYEE DETAIL

Employee ID : 000050020
Name : ABSENT, MARCUS M.
Cycle : CFG-MERIT-99

Home Department Code : 804918 Next Merit Review Date : 10/04
 Home Department : CHANCELLORS OFFICE Next Merit Review Code : 2
 Most Recent Hire Date : 07/01/1987 Probationary Period End Date :

Appointment 10 CHANCELLORS OFFICE

Title Code : 7275 Title : PROGRAMMER/ANALYST III
 Appointment Begin : 07/01/1996 TUC/Appt Rep : 99 / C Pay Schedule : MO
 Appointment End : Indefinite Rate Code : A Appointment Type : 2

Dist#	FAU/Translation	DOS	Pct	Old Annual Salary / Old Rate	New Annual Salary / New Rate	% Incr.	Incr. Amount	Begin Date	End Date	Cost	FY Cost
11	3404918 19900 1 CHANCELLOR'S OFFICE	REG	0.80	49400.04 4116.67			-49400.04	07/01/1996	Indefinite		

Comments: