

Created on: June 4, 2007
Last Modified on: June 13, 2007

**SR81909 Requirements
2007 Web Merit Enhancements, Phase II**

Objective:

To implement mission-critical enhancements to the Web Merit online application, so that campuses may utilize the application to process October 2007 salary increases successfully.

Project Type:

This is a series of enhancements to an existing application.

Requested by:

HR&B HR and Compensation Policy

Analyst:

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Due Date(s):

The requested modifications are Date Mandated.

It is requested that the changes be made available to campuses by August 1 so that they have adequate time to test and install the release prior to processing of October 2007 merit cycles.

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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 the following year, R1513, added new functionality to process across-the-board (ATB) cycles.

In 2005, 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. To address those concerns, the following releases were implemented in 2006:

- R1713, dated 07/12/06, 2006 Web Merit Enhancements
- R1722, dated 08/28/06, Web Merit Enhancements 2006 Phase II
- R1726, dated 09/13/06, Web Merit Follow-up
- R1728, dated 09/19/06, Web Merit Fix

Following the October 2006 merit cycles, HR&B ISS again solicited feedback from the campuses regarding further enhancements that would make the application even more beneficial. The 2007 enhancements will be completed in phases for efficiency. This Service Request follows SR81873, 2007 Web Merit Enhancements, Phase I.

Employee Database (EDB) Extract Without Salary (WOS)

Current Process:

The PPP675 procedure divides the new pay rate by the old rate to get the percentage increase. Currently, Without Salary (WOS) appointments are included in the extract. The pay rate is zero for WOS appointments, causing a "divide by zero" error. It is not necessary to include WOS appointments in merit processing.

Proposed Process:

The EDB extract program should be modified to exclude appointments without salary (WOS).

Merit Cycle Administration Performance Evaluation Table

Current Process:

After a new cycle is established, the next step is to set up the Performance Evaluation Table for that cycle. The Performance Evaluation Table allows the merit administrator to establish campus-specific Performance Evaluation Codes for the merit cycle. Campuses have the flexibility of using local code values that are mapped to standard code values that have been established in PPS.

Prior to changing the cycle status from “U” (Under Construction) to “P” (Preliminary Merit Extract in progress), the merit administrator must first update both the Performance Evaluation Table and the Performance Rating Table. To update the Performance Evaluation Table, the user selects the Performance Evaluation radio button on the Merit Cycle Administration page and then clicks the “edit” button.

The first time the Performance Evaluation Table opens for a given cycle, the buttons at the bottom of the page are “Add,” “AddMore,” and “Reset.” Even if the merit administrator wants to accept the default values in the Performance Evaluation Table, he/she must open the table and click the “Add” button. This is not intuitive, and there are no instructions. The current message when the Performance Evaluation Table is first opened for a cycle is “No record in database. Default Performance Evaluation Codes displayed.”

To delete one or more performance ratings, the user checks the Select Delete box next to the standard definition, and then clicks the “Add” button. Users find it confusing to click “Add” when they want to delete ratings.

Proposed Process:

The Performance Evaluation Table should be modified as follows:

- 1) The “Update,” “AddMore” and “Reset” buttons should always appear, even when the table is first opened for a given cycle.
- 2) The “Add” button should be removed.
- 3) The “AddMore” button label should be changed to “Add More.”
- 4) When the Performance Evaluation Table is first displayed for a given cycle, the following text should be added to the current message: “To accept the default values, click the ‘Update’ button.”

Cycle Description

Current Process:

The merit administrator enters a description for the cycle on the Add New Cycle page. Once the cycle is established, cycle attributes can be modified using the Update Merit Cycle page. Currently the Update Merit Cycle page does not allow the new description to be longer than the existing description. Since the field length is 30 characters, users should be able to enter a new description of up to 30 characters.

Proposed Process:

The Update Merit Cycle page should allow the cycle description to be changed to a value of up to 30 characters, regardless of the length of the existing description.

Eligibility Criteria

Current Process:

When adding or modifying a cycle, the user can select one or more values for the Next Salary Review Code by clicking the checkboxes next to the various choices. Currently one of the choices for Next Salary Review Code(s) is “Eligible for six-month increase.” This choice is obsolete and can be removed.

Proposed Process:

The Add New Merit Cycle and Update Merit Cycle pages should be modified so that the “Eligible for six-month increase” choice does not appear as an option for the “Next Salary Review Code(s)” field.

Rounding of New Hourly Rate

Current Process:

On the current Web Merit Step Roster, new hourly rates are carried out to four decimal places. However, it is the practice for hourly rates to be rounded to two decimal places. They should have four digits after the decimal, but the last two places should be zeros.

The formatting of new hourly rates on the Step-based Roster is inconsistent with the Employee Detail page, which correctly rounds the new rate to two decimal places.

Web Merit passes hourly rates to the EDB as four-decimal place rates with significant numbers in the last two positions, e.g. 18.6345. The final two positions are not zero, which is problematic.

UCSB reported that, after using Web-merit to process rate adjustments for the RX unit, new hourly rates on the EDB Distribution were carried out to four digits, e.g. \$23.3218 rather than \$23.3200. This meant that the department had to correct the distribution rate in the EDB after the merit actions had been processed. While PPS allows hourly rates with four decimal places, the last two places should always be zeros.

Note: The pop-up title rate window displays four-digit hourly rates for Bi-weekly paid employees. This issue will be addressed separately as a Title Code Table (TCT) enhancement request.

Proposed Process:

The Step-based Merit Roster should be modified as follows:

- 1) Hourly rates should be rounded to the nearest cent.
- 2) Four digits after the decimal should be displayed. For example, \$25.0172 would be rounded to \$25.0200; \$23.3218 would be rounded to \$23.3200.

The EDB Update process should be modified as follows:

- 1) Hourly rates should be consistently rounded to the nearest cent.
- 2) Four digits after the decimal should be passed in the transaction, with the last two digits zero-filled. For example, \$25.0172 would be rounded to \$25.0200; \$23.3218 would be rounded to \$23.3200.

Roster Validation

Current Process:

The Save button on the Merit Rosters bypasses the edit on performance rating when the RSM (Rate Set to Maximum) condition is present on that employee record. The performance rating should be edited even when the record has been flagged as “RSM.”

Evaluation Date should always be required, unless the performance rating corresponds to the description “XNo Performance Evaluation Conducted.” This validation currently exists for the Calculate button.

Proposed Process:

The Save function on the Merit Roster should be modified so that the performance rating edits are performed, even when the RSM condition has been triggered.

Change Requirements

1.0 EDB Extract Process

1.1 Exclude Without Salary (WOS) Appointments

Modify the EDB extract to exclude appointments with an Appointment Without Salary Indicator (EDB2028) value of “Y.”

2.0 Merit Cycle Administration

2.1 Performance Evaluation Table Buttons

The Performance Evaluation Table in the Merit Cycle Administration function should be modified so that the “Update,” “AddMore” and “Reset” buttons always appear, even when the table is first opened for a given cycle.

The “Add” button should be eliminated.

The label on the “AddMore” button should be changed to “Add More” (add a space).

2.2 Performance Evaluation Table message

When the Performance Evaluation Table is first displayed for a given cycle, add the following text to the existing message:

“To accept the default values, click the ‘Update’ button.”

2.3 Cycle Description

The Update Merit Cycle page should be modified so that the user can change the cycle description to a new value containing up to 30 characters (the maximum length of the field), regardless of the length of the existing description.

2.4 Eligibility Criteria

On the Add New Merit Cycle page and the Update Merit Cycle page, in the “Next Salary Review Code(s)” field, eliminate the option “Eligible for six-month increase.”

3.0 Rounding of New Hourly Rate

3.1 Step-based Merit Roster

Modify the Step-based Merit Roster to round the new hourly rate to two digits after the decimal. The new hourly rate should be displayed with four digits after the decimal, with the last two digits being zeros. An appointment is hourly if the Appointment Rate Code is “H.”

Note: Title Code Table (TCT) rate display issues are not being addressed at this time.

3.2 EDB Update Transaction

Modify the new hourly rate transmitted in the EDB update transaction so that it is consistently rounded to two digits after the decimal. The new hourly rate should have four digits after the decimal, the last two digits being zeros.

4.0 Roster Validation

The Merit Roster page Save function should be modified so that the performance rating is edited regardless of the presence of the RSM (Rate Set To Maximum) code. This performance rating edit will automatically include checking for a valid Evaluation Date, unless the performance rating corresponds to “XNoPerformanceEvaluationConducted.”