

# Instructional Guide for the Payroll/Personnel System Web Based Merit Entry System

09/2011

## The Web Merit Process

The Web Based Merit Entry (Web Merit) system is designed to provide a flexible, easy to use roster program that generates merit rosters according to a set of campus established criteria. Access to the Web Merit data files is limited to authorized users through DACSS.

Key roles are essential to the web merit process. While these roles exist now for the manual merit process, the web merit process changes how the functions relate and interact.

## Access to Web Merit

### Security

Access to the Web Merit process is granted through the campus PPS Application Resource Security Management (ARSM) rules.

### Entry into the Web Merit System

The Merit Access link has been added to the PPS Online Web Inquiry menu. Users may access the Merit function from this pathway or via the CHR portal. Access to the Online Web PPS is granted authorized users through the sign on and password screen.



The screenshot shows the UCLA Logon interface. At the top, there is a blue box with the text "UCLA LOGON". Below this is a "Sign In" section. It contains two input fields: "UCLA Logon ID" with a link "(Get a Logon ID)" and "Password" with a link "(Reset your password)". Below the fields is a blue "Sign In >" button and a "Help" link. At the bottom of the page, there is a footer with the text "Privacy, Security & Legal | Loaded: Thu, 08 Sep 2011 09:13:45 -0700".

The user is then presented with the Online PPS Main Menu, from which the *Web Merit* application can be selected.

UCLA Home / Campus Services / Finance / Payroll Services / Web Applications

### Web Applications

A number of web applications are available to departmental Personnel Payroll System (PPS) users. In addition, At Your Service Online is available to all University employees and GLACIER® can be used by all foreign visitors. Each is described below along with a link for more information. Access Requirements that apply to each of the PPS web applications are listed below the list of applications. To access the login page for each application, click on Go below the name of the application:

Web Application	Description
<a href="#">Go</a> <b>Document Direct</b>	A report viewing application provided by AIS as the primary source for the review of Personnel/Payroll reports. <a href="#">More...</a>
<a href="#">Go</a> <b>Web EDB Application</b>	The Web EDB Application is an enhancement to the Personnel/Payroll System (PPS) EDB bundle processes. The web-based entry process offers the EDB Preparer the ability to update personnel actions with several enhanced features in order to streamline the personnel data entry process. All personnel actions entered in the Web EDB Application will immediately update into the current PPS system. <a href="#">More...</a>
<a href="#">Go</a> <b>Online Financial System Reports (OFSR)</b>	The Payroll Reports available on the OFSR include the following: <ul style="list-style-type: none"> <li>• Distribution of Payroll Expense Report</li> </ul>

## Main Merit Menu

The user is presented with the main merit navigational screen and should select the option Merit Review/Input to access rosters.

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58 PDT 2006 | MERIT MENU | User: PPAMW | [FAQ](#) | [Merit Menu](#) | [Logout](#)

- [Merit/Across the Board Administration](#)
- [Merit Review / Input](#)
- [Audit Past Cycles](#)

A user will see several options but will be able to access only the part of the application they have rights to. If a user tries to access an option they do not have rights to the following message is displayed:

PAYMRV does not have permission to Administrative screens.

## Merit Rosters

Departmental, Control Point and the Merit Administrator users access merit rosters based on authority established in the ARSM tables. The user can access a specific merit roster from the main Merit Cycle Selection page by selecting an open Merit Roster to review/update.

## Roster Selection

Web Merit System - Roster Cycle Selection List - Microsoft Internet Explorer

Address: <http://pps1edbqa.ais.ucla.edu/webmerit/ControllerServlet?action=CYCLELIST&mode=ROSTER>

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MERIT ROSTER SELECTION

User: PPAWV | [FAQ](#) | [Merit Menu](#) | [Logout](#)

**Roster Cycle List**

Select	CycleID	CBUC	Description	Status	BW Effect Date	MO Effect Date
<input type="radio"/>	<a href="#">EX-2006ATB-3</a>	EX	EX-2006ATB-3	U	08/27/2006	09/01/2006
<input type="radio"/>	<a href="#">QN-TESTDATA</a>	99	TEST DATA FOR TRAINING	O	09/24/2006	10/01/2006
<input type="radio"/>	<a href="#">QN-TESTDATA-MSP</a>	N/A	MSP TEST DATA FOR TRAINING	O	09/24/2006	10/01/2006
<input type="radio"/>	<a href="#">MD-MSP-2006MERIT</a>	N/A	MD-MSP2006MERIT-1	O	09/24/2006	10/01/2006
<input type="radio"/>	<a href="#">MD-MSP2006</a>	N/A	HEALTHCARE-2006 MSP MERIT	O	09/24/2006	10/01/2006
<input type="radio"/>	<a href="#">MD-PSS-2006MERIT</a>	EXT	MD-PSS 2006MERIT-1	O	09/24/2006	10/01/2006
<input type="radio"/>	<a href="#">MG-MSP2006</a>	N/A	UCMERCED-2006 MSP MERIT	O	09/24/2006	10/01/2006
<input type="radio"/>	<a href="#">MG-PSS2006</a>	EXT	UCMERCED-2006 PSS MERIT	O	09/24/2006	10/01/2006
<input type="radio"/>	<a href="#">MPS992006</a>	EXT	99	R	10/02/2006	10/01/2006
<input type="radio"/>	<a href="#">NXJAN2006</a>	NX	JAN2006 NX-ATB	U	01/01/2006	01/01/2006
<input type="radio"/>	<a href="#">QP-MSP2006</a>	N/A	UCOP-2006 MSP MERIT	O	09/24/2006	10/01/2006
<input type="radio"/>	<a href="#">PCS-PSS-OP-2</a>	99	2006 MERIT PROCESS	O	09/24/2006	10/01/2006
<input type="radio"/>	<a href="#">PSS-PROUC</a>	EXT	OCT2006	H	09/24/2006	10/01/2006
<input type="radio"/>	<a href="#">TESTRECORD</a>	ALL	TEST1	U		07/01/2006

- Select one merit cycle to process or review
- Clicking on the Cycle ID will link to Eligibility Criteria

Done

Internet

The user can click on the **CycleID** link and view the criteria determined by the Administrator to set up the merit cycle.

Eligibility Criteria	
Cycle Identifier	EX-2006ATB-3
Cycle Date	09/06
Sublocation	ALL
Program Type	CBU
Description	EX-2006ATB-3
Cycle Status	U - Under Construction
Cycle Type	ATB - Open Range
Collapsing Option	Appt Dept
Next Salary Review Date	
Next Salary Review Code(s)	
Appointment Type(s)	Regular/Career Limited Partial year/Career
Oldest Performance Review	
Elig Criteria: Hire Date	
Elig Criteria: Monthly Probation Date	
Elig Criteria: Biweekly Probation Date	
Collective Bargaining Code	EX
Appointment Representation Code	COV
Biweekly Effective Date	08/27/06
Monthly Effective Date	09/01/06
Biweekly Reduction End Date	
Monthly Reduction End Date	
Control Percent	4.00
Over Maximum Indicator	Y
Remaining Fiscal Year Months	10
New Next Salary Review Date	

After the cycle has been selected the user is presented with a list of rosters according to assigned access rights. For example, the following screen reflects the various departments reporting under a control unit.

Web Merit System - Roster Dept. Selection List - Microsoft Internet Explorer

Address: http://pps1edbaqa.ais.ucla.edu/webmerit/ControllerServlet?action=DEPTLIST&mode=ROSTER

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Wed Aug 23 10:59:31 PDT 2006 MERIT ROSTER SELECTION User: PPAMW | FAQ | Merit Menu | Logout

Roster Department Selection List  
Cycle ID : GN-TESTDATA  
Cycle Type : Merit - Open Range

Department No.	Department Name	Rule	Select
000000	UNIVERSITY ELEMENTARY SCHOOL	MERITDPT	<a href="#">This Dept</a>   <a href="#">Get All</a>   <a href="#">Down</a>
012500	BIOENGINEERING DEPARTMENT	MERITDPT	<a href="#">This Dept</a>   <a href="#">Get All</a>   <a href="#">Down</a>
013500	CIVIL & ENVIRONMENTAL ENGINEER	MERITDPT	<a href="#">This Dept</a>   <a href="#">Get All</a>   <a href="#">Down</a>
014300	CTR FOR EMBEDDED NETWORKED SEN	MERITDPT	<a href="#">This Dept</a>   <a href="#">Get All</a>   <a href="#">Down</a>
014500	COMPUTER SCIENCE	MERITDPT	<a href="#">This Dept</a>   <a href="#">Get All</a>   <a href="#">Down</a>
015000	INSTL. FOR CELL MIMETIC SPACE	MERITDPT	<a href="#">This Dept</a>   <a href="#">Get All</a>   <a href="#">Down</a>
016000	ELECTRICAL ENGINEERING	MERITDPT	<a href="#">This Dept</a>   <a href="#">Get All</a>   <a href="#">Down</a>
019000	MATERIALS SCIENCE & ENGR	MERITDPT	<a href="#">This Dept</a>   <a href="#">Get All</a>   <a href="#">Down</a>

## Range Based Merit Roster

The Range based rosters allow the user access to departments. The user accesses the merit roster from the Merit Cycle Selection screen and then selects the appropriate roster for review and update. The roster displays an employee's current title, salary and grade. Should the user need more detailed pay information, to add comments about the employee, or to delete the employee from the merit roster they must click on the employee's name to get to detailed distribution information. The roster allows a calculation option to view the results of an increase recommendation before the data is submitted.

### Sample Roster:

Name/ Employee ID	Title Code/Dept. Dept. Desc.	Pay Sched/ Time%	Current Ann. Salary/ Rate	Grade	Eval Date (MM/YY)	Perf Rating	Annual Increase	Pct Incr.	New Annual Salary/ Rate
<a href="#">POPPINS, MARY</a> 302501070	7243 / 012500 BIOENGINEERING DEPARTMENT	MO 1.00	47424 3952.00	2	04/06	X	1659.84	3.50	49084 4090.32
<a href="#">WATLIN, BELLE</a> 103248615	7278 / 012500 BIOENGINEERING DEPARTMENT	MO 0.30	38292 3191.00						
<a href="#">WILKES, ASHELY</a> 001602104	4353 / 012500 BIOENGINEERING DEPARTMENT	MO 1.00	53160 4430.00	2	04/06	1	1329.00	2.50	54489 4540.75
<a href="#">WILLY, CHILLE</a> 800932390	7514 / 012500 BIOENGINEERING DEPARTMENT	MO 1.00	54288 4524.00	4	06/06	5	8143.20	15.00	62431 5202.60

Buttons: Save Changes, Reset, Calculate, Cost Summary, Download Roster

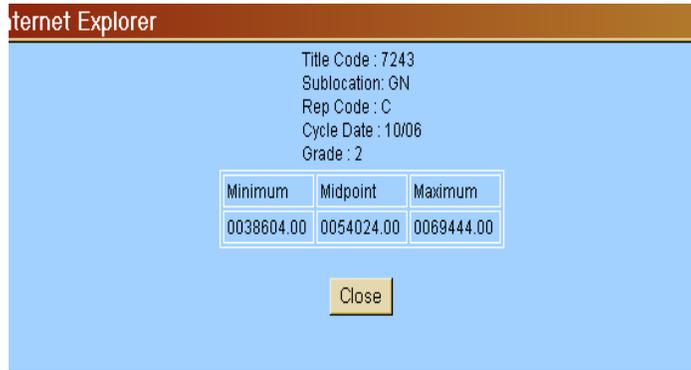
### Roster Update

For each employee listed the user will input the date of the last employee performance evaluation, the performance rating, the new recommended annual increase amount or the percent value of increase. The system will not allow an increase to be entered which will take the salary rate above the established maximum for the title code. When the user enters an increase that will exceed the established maximum, the system will display the message: **“Max : new rate set to maximum rate available in TCT”** for the employee record.

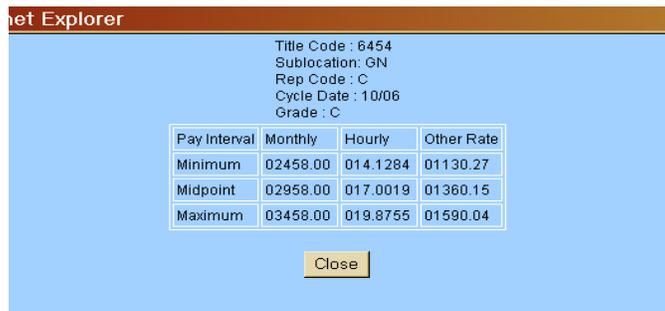
- There are links on the roster to aid the user in determining appropriate performance ratings according to the criteria set up by the Campus Merit Administrator. By clicking on the 'Perf Rating' header, the user is presented with the performance evaluation codes established for that merit cycle.

Performance Evaluation Codes				
Local Code	Description	Min	Max	Req. Rec.
X	XNo Performance Evaluation Conducted	0.00	15.00	Rec.
1	1Fails to Meet, Unsatisfactory	0.00	15.00	Rec.
2	2Partially Meets, Improvement Needed	0.00	15.00	Rec.
3	3Meets Expectation, Satisfactory	0.00	15.00	Rec.
4	4Exceeds Expectations, More than Satisfactory	0.00	15.00	Rec.

- The title code also provides a link to salary scale information to aid the user in determining increase possibilities for the employee's salary. If the title is established with a grade value and the grade appears in EDB, the following display is presented showing the grade as well as the minimum, mid-point, and maximum from the salary grade table.



- If the title has been established as merit based but the salary range is specific to the title, this is the rate display that will be shown:



- By clicking on the **Employee Name** the user is taken to a detail screen showing the employee's distribution data for the selected appointment. On this page the user can delete the appointment from the roster if it has been determined the entry is in error. The user can also record comments regarding the action. When deleting an employee, the program prompts the user for comments to insure an audit trail of the reason for the deletion. The deleted employee's line of data will be highlighted when the user returns to the roster page and it will no longer be possible to make changes to that employee's data. If the user is only adding comments to the employee's record, after typing text, they only need to click the save button.

**RANGE BASED ROSTER  
EMPLOYEE DETAIL**

Employee ID : 800932390  
Name : WILLY,CHILLE  
Cycle : GN-TESTDATA

Home Department Code : 012500      Next Merit Review Date : 10/06  
Home Department : BIOENGINEERING DEPARTMENT      Next Merit Review Code : 2  
Most Recent Hire Date : 09/15/1997      Probationary Period End Date : 03/15/1998

**Appointment 30 BIOENGINEERING DEPARTMENT**  
Title Code : 7514      Title : MGMT SERV OFF II - SUPERVISOR  
Appointment Begin : 01/01/2004      TUC/Appt Rep : 99 / S  
Appointment End : Indefinite      Rate Code : A      Pay Schedule: MO

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
31	44026102A.19900.1 ENGR/BIOENGR-OPER/ADMIN	REG	1.00	54288.00 4524.00	62431.20 5202.60	15.00	8143.20	10/01/2005	Indefinite	8143.20	6107.40

Comments:

## Costing

After the user has completed entry of merit recommendations the Costing Summary feature can be utilized. It calculates the current and new salary base by fund source, the annual cost, whether the roster is over or under the Control Percent and by what dollar amount. The program also determines the fiscal year cost calculated by the number of months from the Merit Effective Date to June 30.

Note that if an employee has been 'deleted' from the merit process, the salary for that employee is not included in the 'Current Salary Base' calculation and will therefore not generate merit allocation dollars.

**Costing Summary for selected Roster of Cycle : GN-TESTDATA**  
Control Percent=3.50

Fund Source	Current Salary Base	Merit Allocation	New Salary Base	Annual Cost	Under Over	Annual Cost%	Fiscal Cost
STATE (19900 - 19900)	107,448	3,760	116,920	9,472	-5,711	8.82	7,104
<b>SUB-TOTAL</b>	<b>107,448</b>	<b>3,760</b>	<b>116,920</b>	<b>9,472</b>	<b>-5,711</b>	<b>8.82</b>	<b>7,104</b>
OTHER	58,911	2,061	60,571	1,659	402	2.82	1,244
<b>GRAND TOTAL</b>	<b>166,359</b>	<b>5,822</b>	<b>177,491</b>	<b>11,132</b>	<b>-5,309</b>	<b>6.69</b>	<b>8,349</b>

## **EDB Update**

It is critical that all employee information be current and accurate so that the program can offer accurate results. Once the process is near completion, the increase, as well as the performance evaluation information will be updated into EDB.