Merit Application: Campus Training

Navigation:

The merit request can also be found on the Personnel Info/Actions and the Budgeting Tile.

Gemini HR > UTD Customizations >
What is the purpose? Once the President approves a merit program for the year, this application will be used for schools/divisions to award merit to their employees.

Who has access? The fiscal officers are assigned access and will have the ability to assign individual access to their respective departments. The VPs, Deans, and Provost Office have view only access to see the merit requests until the form is in their workflow. Once the form is in their workflow, they will have access to edit. The Provost Office will review all of the school workbooks once they are submitted and have access to make changes.

How does it work? The eMerit Application calculates an authorized merit amount for each school/division. This amount is calculated by the eligible pool of active employee salaries six months before the merit date times the merit pool percentage for the year. The users will be able to add merit to all of their eligible employees by dollar amount or percentage. When the school/division submits their workbooks, it goes into workflow and will be routed to the VP or Dean, Provost (if academic), and Budget office.
Merit Request Features

Comments: Notes can be added here that other users would find useful.
Core/Non-Core section cannot be viewed by Department Managers.
Division Authorized: Calculated by the eligible pool of active employee salaries six months before the merit date times the merit percentage as approved by the President.
Department Authorized: Represents the merit amount allocated to the department by the school/division. Division managers have access to override these department authorized amount(s) based on the VP/Dean’s direction under the Assign Department Manager page.
Assigned: Displays the merit amount that has been awarded to employees within the Division.
Remaining: Displays the available amount by taking the Division Authorized less Assigned.
Attachments: Attachments can be added by users for backup documentation.
Core/Non-Core section cannot be viewed by Department Managers.

Filter Departments: If you have multiple departments, this filter box will be on the page to use. You can select one or multiple departments to filter by. Selecting all departments or selecting none will result in display of all employees from all departments.

Apply % to Selected: Gives the option to select multiple employees and assign the same merit percentage. On the left-hand side, you can click the checkbox under the select column or use the select all button above it.

(Div Mgr) Merit %: Displays the percentage of merit awarded for the specific employee.

(Div Mgr) Merit Amount: Displays the dollar amount of merit awarded for the specific employee.

Helpful Hint: Department Manager, Division Manager, Dean or VP, and Provost (if academic) will each have their own two columns labeled accordingly. Each user will only have access to their two columns. If a division manager makes a change, it will supersede the previous merit amount entered by the department manager. If the Dean makes a change, it will supersede the division manager’s amounts and so on. The columns of the previous users will remain grayed out for historical data. The VP (administrative) and Provost (academic) are the final users that can make changes before the form is routed to the budget office for final approval.
Core/Non-Core section cannot be viewed by Department Managers.
The department summary page provides an overview of each department within a division. It will show you how much merit has been assigned and remaining to be assigned. It also gives you a quick view to see if a department has been locked by a division manager or if a department manager has completed their merit entry. You can see the department manager’s name listed beside each department as well.

The amounts in this table are based on the Department Authorized amount, in the core/non-core table at the top. If the division manager needs to update the amounts, they can change that on the Assign Department Manager page and the department amounts will update accordingly.

Department Managers

What is a Department Manager?
A department manager is assigned by a division manager or fiscal officer of the division. This is usually one individual who is considered the financial contact for their department (ex. Director, department owner, etc.).

What are a Department Manager’s responsibilities?
Enter Merit Amounts

- A department manager can enter merit amounts for all eligible employees in their department on the Employee Detail tab.
  - The Department Manager will only have access to change merit on the Department Manager Merit columns.
  - A dollar amount or percent can be entered for an individual’s merit.
  - If you have one or more departments, you can use the ‘Filter Department’ feature at the top of the Employee Detail page.
  - All columns can sort from A to Z or ‘Highest to Lowest’ by clicking on the column title.
The ‘apply all’ feature can be used when you need to apply the same merit percentage to multiple people.

- Employees who are not eligible for merit or if the position is vacant, will have their merit columns grayed out.
- Notes and attachments are open to use on the General Info tab.

Submit Request to Division Manager

- After all the merit data entry has been completed, the department can submit their workbook to the division manager by clicking the ‘Department Manager Data Entry Complete’ button at the bottom of the Employee Detail page.
- The merit request will now be read-only for the department manager.

Request to Unlock Merit Request

- If the department manager submits the Merit Request to the division manager and needs to make a revision, they can contact the Division Manager to unlock the merit request for them.
- Once the merit request is unlocked, revisions can be made again. Please remember to resubmit the workbook after corrections are completed.

Division Managers

What is a Division Manager?
A division manager is assigned by the Budget Office. This is usually one individual who is considered the fiscal officer for their division.

What are a Division Manager’s responsibilities?

Assign Department Managers

- On the Assign Department Managers page, if a division manager has more than one department in their area, they can assign a department manager(s) to key in merit amounts for their specific department.
Items to Consider for Department Manager Role

- Assigning Department Managers is optional.
- Department Managers do not have permission to submit the Merit Request.
- Department Managers don’t have access to view the core/non-core box with the Division information on any of the three tabs in the merit application.
- Department Managers will only see the amount assigned to their department(s) on the Department Summary page.
- If you want to assign someone read-only access, you could assign them as a department manager and leave the merit request locked (on the Assign Department Managers page)

Override Department Merit Amounts

- On the Assign Department Managers page, the division managers have the option to change the merit amount given to each department if desired.
- For example, if the pool percent is 3%, the amount assigned to each department can be 2% and the other 1% is left for the Dean or VP’s discretionary use.
- Once the Dean or VP determines merit allocations for each department, the Division Manager can go in and change the Division Override Core and Non-Core Amounts. The Department Manager will only see the override amount.

Lock out Department Managers

- On the Assign Department Managers page, the division managers have the option to lock out department managers from the workbook. This will change the department managers to have Read-Only access. When the Merit Application is opened for Division Managers, the “Lock By Div Mgr” will be automatically checked.

Unlock Department Managers

- On the Assign Department Managers page, the division managers can also unlock or release the Merit Request back to the department managers if they need to make a revision. This can be done by unchecking the Lock by Div Mgr box or the Dept Mgr Completed box if the workbook has already been completed.

Enter Merit Amounts

- Once the Department Manager finishes entering the merit amounts (if there is a department manager), the Division Manager can now go in and review or make changes to the merit columns on the Employee Detail tab.
  - Please note the Department Manager section will be grayed out and no changes can be made in those columns. The Division Manager will only have access to change merit on the Division Manager Merit columns. Any differences from the Department Merit and the Division Merit will be highlighted in yellow on the Division Merit columns.
  - A dollar amount or percent can be entered for an individual’s merit.
  - If you have one or more departments, you can use the Filter Department feature at the top of the Employee Detail page.
  - All columns can sort from A to Z or ‘Highest to Lowest’ by clicking on the column title.
  - The ‘apply all’ feature can be used when you need to apply the same merit percentage to multiple people.
  - Employees who are not eligible for merit or if the position is vacant, will have their merit columns grayed out.
  - Notes and attachments are open to use on the General Info tab
Submit Merit Request

- Once the merit request has been completed by the Division Manager, they can click submit on the General Info page.
- Once the request has been submitted, no changes can be made by the Division Manager. The Division Manager has the option to call the request back if a change needs to be made. From there, the form is routed to the respective Dean or VP.
- The Division Manager will receive an email once the merit request has been completed.

Vice President and Dean Approvers

What is a Vice President or Dean?
The non-academic divisions will have their Vice President in the workflow to review and approve the merit for their division. The academic divisions will have their Dean in the workflow to review and approve the merit for their division. The Vice President and Dean approvers have been assigned by the Budget Office.

What are the Vice President’s and Dean’s Responsibilities?

Review/Revise Merit Amounts

- When a merit request is ready for a Vice President or Dean to review, they will receive an email notification with a link that will take them to the merit request.
- A Vice President or Dean can change already entered merit amounts for all eligible employees in their division on the Employee Detail tab.
  - Please note the Department Manager and Division Manager section will be grayed out and no changes can be made. The Vice President or Dean will only have access to change merit on the Vice President or Dean merit columns. Any differences from the Division Merit and the Vice President or Dean merit will be highlighted in yellow on the Vice President or Dean merit columns.
  - A dollar amount or percent can be entered for an individual’s merit.
  - If you have one or more departments, you can use the ‘Filter Department’ feature at the top of the Employee Detail page.
  - All columns can sort from A to Z or ‘Highest to Lowest’ by clicking on the column title.
  - The ‘apply all’ feature can be used when you need to apply the same merit percentage to multiple people.
  - Employees who are not eligible for merit or if the position is vacant, will have their merit columns grayed out.
  - Notes and attachments are open to use on the General Info tab

Submit Merit Request

- Once the merit request has been completed by the Vice President or Dean, they can click submit on the General Info page.
- Once the request has been submitted, no changes can be made by the Vice President or Dean. The Division Manager has the option to call the request back if changes need to be made. From there, the form is routed to the Provost Office for academic areas or the Budget Office for administrative areas.
- The Vice President or Dean also has the option to send the merit request back to the Division Manager (if needed) on the General Info page.
Provost Office Approvers

What is a Provost Office Approver?
The Provost Office Approvers will review and approve all school merit requests. The provost approvers are assigned by the Budget Office.

What are the Provost Office Approver’s Responsibilities?
Review/Revise Merit Amounts

- When a merit request is ready for the Provost to review, they will receive an email notification with a link that will take them to the merit request.
- A Provost Office Approver can change already entered merit amounts for all eligible employees in the division on the Employee Detail tab.
  - Please note the Department Manager, Division Manager, and Dean section will be grayed out and no changes can be made. The Provost Office Approver will only have access to change merit on the Provost merit columns. Any differences from the Dean merit and Provost merit will be highlighted in yellow on the Provost’s merit columns.
  - A dollar amount or percent can be entered for an individual’s merit.
  - If you have one or more departments, you can use the ‘Filter Department’ feature at the top of the Employee Detail page.
  - All columns can sort from A to Z or ‘Highest to Lowest’ by clicking on the column title.
  - The ‘apply all’ feature can be used when you need to apply the same merit percentage to multiple people.
  - Employees who are not eligible for merit or if the position is vacant, will have their merit columns grayed out.
  - Notes and attachments are open to use on the General Info tab

Submit Merit Request

- Once the merit request has been completed by the Provost Office, they can click submit on the General Info page.
- Once the request has been submitted, no changes can be made by the Provost. The Division Manager has the option to call the request back if changes need to be made. From there, the form is routed to the Budget office for final review.
- The Provost Office also has the option to send the Merit Request back to the Division Manager on the General Info page.