

Merit Working Group

Meeting Minutes

Date: April 17, 2023

Time: 10 – 11 a.m.

Microsoft Teams Meeting

Welcome & Roll Call

New Business Analyst for Compensation and Merit

- **Daniel Lewer** has joined Workday Services last year and will be supporting merit process for system members

Merit Process Options and Timeline

- Workday Merit First then PBA
 - Workday is open early to allow time for managers of all levels to enter awards
 - Run the *EDW00217 - HCM Workday Merit Entry for Upload to PBA report* can be used to load Workday Merit to PBA
- PBA First then Workday Merit
 - PBA creates the EIB file to be loaded to Workday
 - Workday Services will launch merit and upload the EIB one-time in production
- EIB for One-Time Merit Lump Sum Payments
- This will be covered in detail in Merit Preview 2023 Webinar on 4/26
 - <https://it.tamus.edu/workdayservices/news-and-updates/upcoming-webinars/>

Merit Statements

- Members have the option to customize the merit statement (add logo, update text) per member as needed
- To utilize this, please send an email to support@tamus.edu
- Workday Services plans to create new merit statement template for out of cycle merit
- **NEW**: Members can now send statements only for a specific supervisory organization if needed

Merit Grid

- Merit Grid can be customized to remove options for Promotion and/or Additional Adjustment as needed by the member
- Merit Process can also be launched separately for staff and faculty as needed

Notes:

TAMU said they would possibly be using one or both options (custom merit grid and/or separate merit launch for staff and faculty) and will let us know when they come to a final position.

Merit Partner role assignments

- Reminder that the Merit Partner role assignments can be used to decentralize merit and assign the Merit Partner role at college or department level
- Top Level merit partner can still enter or edit the awards entered by college or department level merit partners
- Merit Point of Contact for each system member should review their current merit partner role assignments in preparation for FY2023 Merit

Notes:

How to view merit partner list.

-Go to top level organization, go to Role, go to Assignable role and filter for Merit Partner

Merit Alerts

- System members can choose to add additional alerts within the grid for any award amounts that are more than a specific percentage or any other criteria
 - Merit more than 10%
 - Hired in the last 12 months
- A report would be available for any employees who have the alert message

Implementing the 5% or \$3,000 minimum salary increase for Agencies in Workday and PBA Process:

- Workday Services (Sri) will send an EIB and instructions to Agency Budget Officers
- Budget Officers pull data needed to populate the EIB and update the FTE Monthly or Hourly Rate
- **On or before June 23** – Send EIB to Sri
- **June 23 to June 30** – EIB's loaded to Workday with an effective date of 7/1/2023
- **July 2** – SOBA compiles a .csv file from EDW that includes the UIN, Position ID and new FTE Monthly or Hourly rate to update PBA current rate as of the May 10th snapshot with the July 1st effective rate
 - SOBA will distribute a list of updated positions, UIN's and new rates to agencies for review; Members compare PBA list to Workday using Compensation Changes Report and/or EIB
- **July 3 and after** – Agencies update in Workday/PBA any positions that were missed in the EIB process

Notes:

- Anyone who needs to see merit partner roles can send an email request to Sri for list of merit partners.
- Can the grid be custom for dept or colleges or is it only entity wide? For Example, only dept X can see a merit vs others can see all three grids.
 - As of now, it isn't an option to change the grid view by department, only system member/entity.
- For agencies affected by the state increase, do you recommend not "initiating" merit until after July 1st so it can capture the latest compensation change?
 - If done on June 1, even if across board increase is July 1st, no need to wait. Once done with EIB you can start the merit process because the system is looking at the compensation as of 9/1 date regardless.