

# Merit Increase Process for Academic Staff with Segment Dates After July 1<sup>st</sup> of the Current Year

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## Merit Increase Overview

**Overview** These instructions are guiding the PTR/Merit Increase process outside of the normal scenario which involves an Academic staff that has segments recorded after July 1<sup>st</sup> of the current year with future term or continuing end dates already on the system.

This document instructs on how to **Delete** any segments after July 1<sup>st</sup> of the current year and how to **Copy/Change** the Appointment Detail (IT9009) screen and **Create the Basic Pay** (IT0008) screen in order to record the PTR/Merit increase information with an effective date as of July 1<sup>st</sup> of the current year. (**Note:** In some cases, depending what the future entries are pertaining to i.e. funding change or future dated transfer, you may be required to re-process those changes on the employee's record after the July pay has been processed.)



There will be **no automatic** update by Central for the Merit Increase process. Departmental Business Officers will be required to update all record under Basic Pay (IT008), Appointment Detail (9009) and Cost Distribution records (IT0027) with the respective merit amounts as of July 1<sup>st</sup> of the current year prior to pay close.

## HRIS Menu Path: Merit Increase Process

Click on the following path:

Human Resources → Personnel Management → Administration → HR Master Data → Maintain

## Step 1: Delete Any Appointment Detail After July 1<sup>st</sup> of the Current Year





Please ensure prior to deleting or overwriting these records you take a **copy** of the information you are deleting. There is no way to view the deleted information in HRIS. Contact [HRIS Support Team](#) if you need assistance.

1. Enter employee Personnel no.
2. Select Appointment Detail in Financial Tab  Appointment Detail
3. Click on Overview
4. Select the radio button that has the cost centre/fund centre/fund, position and/or percentage of time change on the employee's record that was done **AFTER** July 1<sup>st</sup> of the current year with future term or continuing end date.

Personnel No.	<input type="text" value=""/>	Professor	Kristina Bond
Pers.area	Appointed	Subarea	Academic
Employment	Active	EE subgrp	Prof Tenure Strm
<b>Overview</b>			
<input checked="" type="radio"/>	16.07.2017	30.06.2020	Professoriate Tn-...
	0110		
			115,000.00
<input type="radio"/>	01.07.2016	15.07.2017	Professoriate Tn-...
	0110		
			112,283.00

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5. Click on the delete function 
6. Click on the delete button  again in the Delete Appointment Detail Screen.

## Step 2: Update Appointment Detail (IT 9009) Screen with PTR/Merit Increase




### List Appointment Detail Screen

1. Select the most current record by clicking on the radio button

Personnel No.	██████████	Professor	Kristina Bond				
Pers.area	Appointed	Subarea	Academic				
Employment	Active	EE subgrp	Prof Tenure Strm				
Overview							
Start Date	End Date	Position	Pct.	PS group	Lv	LI	
Wage type	Funds ctr	Cost ctr	Order	Fund	Ann.salary to		
<input checked="" type="radio"/>	01.07.2016	15.07.2017	██████████	Professoriate Tn-...	100.00	03A	02 Term
	0110	██████████	██████████				112,283.00

2. Click on the copy function .

### Copy Appointment Detail Screen Populates (Automatically)



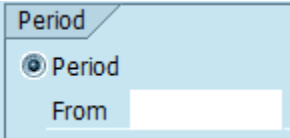

1. Change the start date to July 1<sup>st</sup> of the current year.
2. For the **95% PTR Pool**, select Type – **03 PTR/Merit**
3. Enter the amount of the **PTR**   effective July 1<sup>st</sup> of the current year. (Please round up to the nearest dollar).
4. If applicable, select Type – **18 Merit Supplement** for the **5% Merit Pool** on the next available line .
5. Enter the amount of the **Merit**   effective July 1<sup>st</sup> of the current year. (Please round up to the nearest dollar).
6. Click  or press ENTER.
7. Click on  to Save.

**END OF STEP NO. 1 & 2 – DELETE ANY APPOINTMENT DETAIL (IT 9009) SCREEN AFTER JULY 1<sup>ST</sup> OF THE CURRENT YEAR AND UPDATE APPOINTMENT DETAIL (IT 9009) SCREEN WITH PTR/MERIT INCREASE**





## Step 3: Recreate Deleted Appointment Details (IT 9009) Screen After July 1<sup>st</sup> of the Current Year

**Step 3:** Update and recreate using the Copy function all Appointment Detail (IT9009) information that was deleted in Step 1. Please refer to the HRIS Procedure Documentation for assistance

## Step 4: Update Basic Pay (IT 0008) Screen with PTR/Merit Increase

1. Enter employee Personnel no. 
2. Select Basic Pay in the Financial Tab 
3. Enter the effective date of the salary change 
4. Click on  to Create.

### Create Basic Pay (IT 0008) Screen

1. Verify the default data.
2. Enter the level (Academic Rank) 
3. Enter the new total annual salary 
4. Click  press ENTER
5. Click to SAVE 

**END OF STEP NO. 4 - UPDATE BASIC PAY (IT 0008) SCREEN WITH PTR/MERIT INCREASE**

## Step 5: Recreate Deleted Basic Pay Screens (IT 0008) After July 1<sup>st</sup> of the Current Year

**Step 5 (If Applicable):** If there is a change in salary with a future end date the retro merit increase will be included when you recreate the Basic Pay (IT0008) screen information again using the Create function. Please refer to the HRIS Procedure Documentation or email the HRIS Help Desk if you need further assistance.

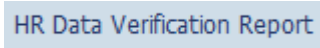




If the change deleted in Step 1 does not affect salary for example: fund centre/cost centre/fund change or position change these do not affect the employee's salary so there is no need to update the basic pay screen (0008) in Step 5. If you have any questions please contact [HRIS Support Team](#).

## HR Data Verification Report

*Run the HR Data Verification Report. The data verification report should be run each time an employee's record is updated. This report identifies inaccurate, incomplete or missing employee data. It provides HRIS users with a tool to verify the entire employee record by checking data on each infotype and by cross-checking data consistency between infotypes.*

### **Personnel Actions Screen. HR Data Verification Report**

1. Click on the HR Data Verification Report Button at the top of the screen 
2. To Print the report click on the PRINT icon 
3. All errors and warnings should be corrected upon completion of the update event.
4. Click on the back arrow  to return to the Personnel Actions screen only.