7.3 ACADEMIC MERIT INCREASE (AMRT)

Overview

The procedures described in this section are for implementing a merit increase for an academic employee. A merit increase can be defined as an advancement in salary rate and step (or to an above-scale salary) without a change in rank or title.

The AMRT Bundle may be used to process a renewal of appointment/reappointment which accompanies a merit increase as long as there are no other changes to be made to the appointment level.

Policy Summary

A merit is advancement to the next higher step after completion of the requisite number of years. An accelerated merit is advancement in step in advance of eligibility to a higher step than normal.

Academic merits are recommended by the unit, e.g., department or research unit. Recommendations in some titles require consultation with the appropriate members of the department. The recommendation is forwarded to the Dean for consideration and in some cases to the Senate Committee on Academic Personnel for review. The final approving authority is the Dean or Executive Vice Chancellor or Chancellor, depending on campus delegations. A chart of these delegations may be found in the *Campus Academic Personnel/Procedures Manual (CAPPM), Appendix 1, Delegations of Authority*.

Requirements for review and criteria for merits in academic titles may be found in the relevant sections of the *Academic Personnel Manual (APM)* and the *Campus Academic Personnel/Procedures Manual (CAPPM)*. Contact the division academic personnel coordinator for assistance in locating the appropriate policy.

Before you Start

1. Obtain required approval to perform the payroll/personnel action.

2. Prepare information for on-line entry.

Data Entry

Enter data for granting a merit increase to an employee in an academic position via the AMRT bundle. This bundle contains the following functions:

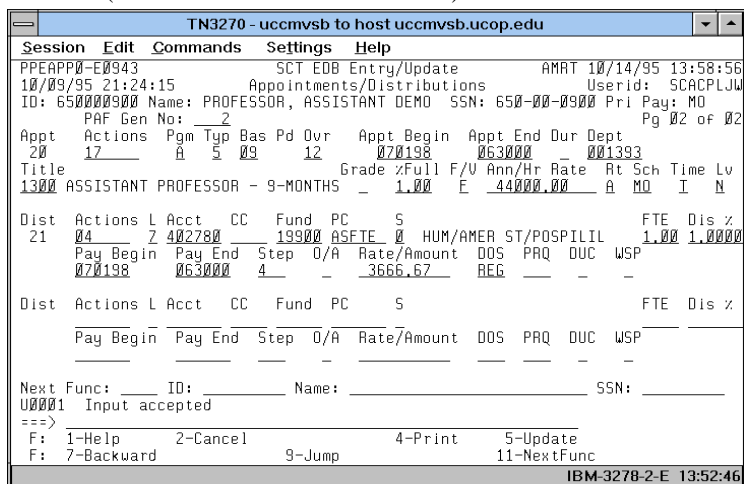**EAPP** (Appointments/Distributions)

EACD (Academic Service)

Accessing AMRT

1. Log on to the Payroll/Personnel System.

2. At the Next Func field, type **EEDB** and press **Enter**.

3. Type **BUND** and press **Enter**.

4. Type **AMRT** and the **employee ID number**. Press **Enter**.

The EAPP function displays the selected employee.

Completing the EAPP Function

THE EAPP (APPOINTMENTS/DISTRIBUTIONS) FUNCTION

```
 ___                 TN3270 - uccmvsb to host uccmvsb.ucop.edu      ▼ ▲
Session  Edit  Commands   Settings   Help
PPEAPP0-E0943            SCT EDB Entry/Update        AMRT 10/14/95 13:58:56
10/09/95 21:24:15       Appointments/Distributions       Userid:  SCACPLJW
ID: 650000900 Name: PROFESSOR, ASSISTANT DEMO  SSN: 650-00-0900 Pri Pay: MO
      PAF Gen No: ___2                                      Pg 02 of 02
Appt  Actions  Pgm Typ Bas Pd Ovr   Appt Begin  Appt End Dur Dept
 20    17____   A   5  09    12       070198     063000   _  001393
Title                           Grade %Full F/V Ann/Hr Rate  Rt Sch Time Lv
1300 ASSISTANT PROFESSOR - 9-MONTHS  _   1.00   F  44000.00    A  MO   I   N

Dist  Actions L Acct   CC   Fund  PC    S                    FTE  Dis %
 21    04____  7 402780 ____ 19900 ASFTE  0  HUM/AMER ST/POSPILIL  1.00 1.0000
       Pay Begin  Pay End  Step  O/A  Rate/Amount  DOS  PRQ  DUC  WSP
       070198     063000    4    _     3666.67     REG  ___  _   _

Dist  Actions L Acct   CC   Fund  PC    S                    FTE  Dis %
 __    _____  _ _____ ____ _____ _____  _                   ____ _____
       Pay Begin  Pay End  Step  O/A  Rate/Amount  DOS  PRQ  DUC  WSP
       _____     _____    _    _     _____     ___  ___  _   _

Next Func: ____  ID: _____  Name: _____  SSN: _____
U0001  Input accepted
===>  _____
 F:  1-Help    2-Cancel            4-Print    5-Update
 F:  7-Backward        9-Jump             11-NextFunc
                                            IBM-3278-2-E  13:52:46
```

Notes and Tips

- If the employee has more than one appointment or more than two distributions, these are stored on additional "pages" (functions). Use **F8 Forward** or **F7 Backward** to scroll through the pages.

- When processing a merit increase, always use the end/begin method. Refer to *Section 1.12, End/Begin Procedures*.

The EAPP Appointment Level Procedure

1. If processing a merit concurrently with a reappointment, end the current appointment if its date is later than the action you are entering.

   If a new appointment needs to be created, **F9 Jump** and then press **F15 Newline** to go to the command line. Copy the original appointment to a new appointment using the "**copy xx to xx**" command.

2. Enter/change data in the following fields, as applicable:

Actions (Action Code)	Enter 17 for Appointment Renewal
Appt end	If the appointment end date is indefinite (999999), and you are processing a merit only, no changes to the appointment are necessary.
	If the employee's merit includes a renewal of appointment which is not changing, you may use the AMRT Bundle to process both reappointment and merit actions.
Ann/Hr Rate	Enter the annual amount as shown on the approval document.

If there is a change to the appointment other than described directly above, a bundle other than AMRT is needed, e.g., ARNW or PCNT.

The EAPP Distribution Level Procedure

1. Navigate to the Pay End field. Enter Pay End date of the previous appointment if necessary for a reappointment action.

2. **F9 Jump** to the command line and create a new distribution (via the **"copy xx to xx"** command or by typing **"add d"** to set up the first available distribution).

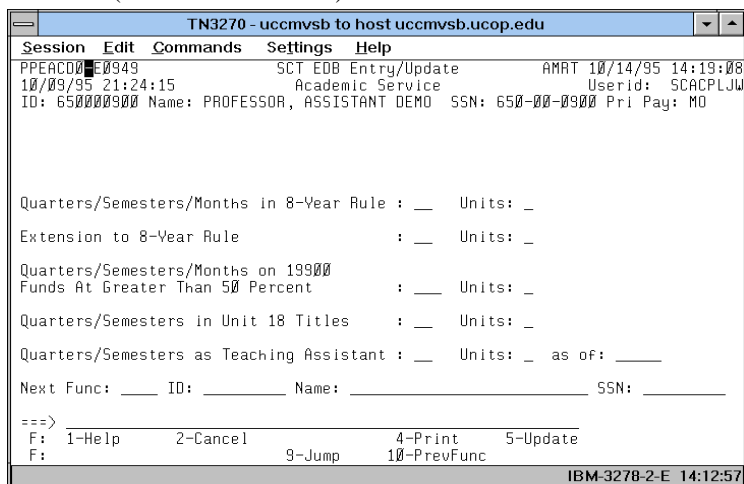3. Enter date in the following fields as applicable:

Actions (Action Code)	Enter Action Code 4 for Merit Increase.
L	Enter 7 for UCSC location number.
Acct	Enter 'organization' FOAPAL number.
CC	Enter cost center.
Fund	Enter fund number.
PC	Enter activity code (optional, not required).
Sub	Enter 0 or 2 as applicable.
FTE	The percentage of the budgeted position which the distribution represents, if applicable. Full time is represented as 1.00.
Dist %	The anticipated percentage of time which is chargeable to the account/ fund. Full time is represented as 1.0000.
Pay Beg	Date on which the pay is expected to begin to be charged to the account/fund, in the format: MMDDYY.
Pay End	Date on which pay is expected to end for the account/ fund, in the format: MMDDYY. If indefinite or tenured, enter **999999**.

Step	The step within the salary range associated with the title code. Normally a merit increase involves a change in step. This is a one digit field for academics.
O/A	Code indicating that the employee's pay rate is off-scale or above scale in relation to the step and/or salary range for the title code of the appointment, if applicable. Press F1 Help to see valid codes.
Rate/ Amt	The monthly, hourly, or by agreement amount associated with the distribution.
DOS	Code indicating the type of compensation associated with the distribution. Press F1 Help to see valid codes.
PRQ	A system derived code indicating the type of prerequisite required.
DUC	A code indicating a group within a bargaining unit to which a distribution for an appointment is assigned for collective bargaining purposes, excluding range adjustments.
WSP	Not used for academics.

4. Press **Enter** to invoke range/value edits.

5. Press **F11 Next Func** to continue to the next function.

Completing the EACD Function

THE EACD (ACADEMIC SERVICE) FUNCTION

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┌──────────────────────────────────────────────────────────┐
│  ▼  │        TN3270 - uccmvsb to host uccmvsb.ucop.edu    │ ▼ ▲ │
├──────────────────────────────────────────────────────────┤
│ Session  Edit  Commands   Settings   Help                 │
│ PPEACD0█E0949           SCT EDB Entry/Update    AMRT 10/14/95 14:19:08│
│ 10/09/95 21:24:15          Academic Service        Userid:  SCACPLJW│
│ ID: 650000900 Name: PROFESSOR, ASSISTANT DEMO  SSN: 650-00-0900 Pri Pay: MO│
│                                                          │
│                                                          │
│                                                          │
│ Quarters/Semesters/Months in 8-Year Rule : __   Units: _ │
│                                                          │
│ Extension to 8-Year Rule            : __   Units: _      │
│                                                          │
│ Quarters/Semesters/Months on 19900                       │
│ Funds At Greater Than 50 Percent        : ___  Units: _  │
│                                                          │
│ Quarters/Semesters in Unit 18 Titles   : __   Units: _   │
│                                                          │
│ Quarters/Semesters as Teaching Assistant : __   Units: _  as of: _____│
│                                                          │
│ Next Func: ____ ID: _____ Name: _____  SSN: _____│
│                                                          │
│ ===>  _____              │
│  F:  1-Help    2-Cancel         4-Print    5-Update      │
│  F:                   9-Jump   10-PrevFunc               │
│                                        IBM-3278-2-E 14:12:57│
└──────────────────────────────────────────────────────────┘
```

Notes and Tips

- The following field descriptions are for your information. Divisions have discretion for use of this function for academic employees.

The EACD Procedure

No entry required at this time. The following is for your information:

Quarters/ Semesters/ Months in 8-Year Rule	The number of quarters, semesters, or months of service accrued in titles Instructor, Assistant Professor, and equivalent titles toward the 8-year service limitation.

Extension to 8-Year Rule	The number of quarters, semesters, or months of additional time added to the 8-year service limitation.
Quarters/ Semesters/ Months on 19900 Funds at Greater than 50 Percent	The number of quarters or semesters (for academic year-based appointments) or the number of months (for fiscal year-based appointments) of service accrued in a title or in the titles Professor in Residence, Adjunct Professor, and/or Professor of Clinical Series and supported on 19900 (State) Funds for more than 50 percent time.
Quarters/ Semesters in Unit 18 Titles	The number of quarters or semesters of service accrued in the titles designated under Unit 18 for collective bargaining purposes.
Quarters/ Semesters as Teaching Assistant	The number of quarters or semesters of service accrued in the titles teaching assistant, Associate, and Teaching Fellow toward the service limitation established by policy for students.

This is the last function in the AMRT bundle. Continue to the *Review* section.

Review

Use **F10 Prev Func** and **F11 Next Func** to navigate through the Review bundle.

1. Make sure you have completed all the required data elements in the bundle.

2. Review all entered data for accuracy and consistency.

Updating the Employee Database

Press **F5 Update** to invoke consistency edits and to display the PAN Subsystem Notification Preparation function.

Consistency Edit Errors

If there are consistency edits, the Consistency Edit (ECON) screen is automatically displayed. Review all error messages and make the necessary corrections.

How to Correct Consistency Errors

From the ECON screen you may:

* Correct errors directly on the ECON screen.

* **F3 Return** to the last data entry function you were at when you updated the action to make the appropriate corrections. Then do one of the following:

    * Press **F5 Update** to invoke PAN.
    * Press **F2 Cancel** twice to cancel the update.

See *Consistency Edit Messages (ECON)* in *Section 1.6, System Messages* in this manual for more information and instructions.

PAN Preparation

After pressing **F5 Update** from a data entry screen (if there are no consistency edits) or an ECON screen, you are automatically positioned at the PAN **Comments Entry** screen. From here you can add comments and additional reviewers to the PAN.

1. Add a description of the action and any significant details in the **Comments Entry** screen.

2. Press **F10 NotfPrep** to display the **Notification Preparation** screen, where you can add reviewers as desired.

3. Press **F11 Detail** to display the **Activity Review** screen, where you can review the notification before sending it.

4. Press **F5 Update** to complete the update and send the notification.

If the update is successful, the first function in the bundle appears and displays:

U0007 UPDATE PROCESS COMPLETE

For more information about PANs and additional PAN features, please refer to *Section 1.8, Post Authorization Notification (PAN)*.

Accessing IMSG

1. To access the Message Report Screen go to the **Next Function** field, type IMSG and press **Enter**.

2. When the IMSG screen is displayed, review any remaining messages and take the appropriate action.

Disposition of Forms

* Forward the appropriate approval document to the mandatory reviewer.

* Forward a copy of the approval letter to employee's office of record for placement in the employee's file.