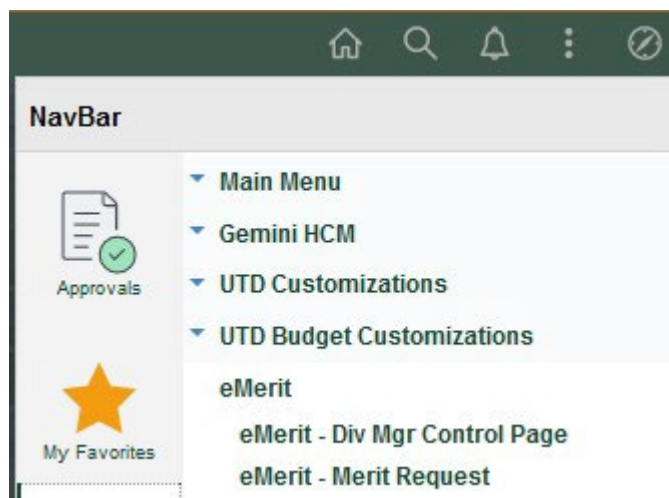


eMerit: Detail Guide

Overview

Navigation: Gemini HCM > UTD Customizations > UTD Budget Customizations > eMerit



The merit request can also be found on the Gemini for Departments page under the Personnel Info/Actions and the Budgeting Tile.

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 eMerit. 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 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

General InfoEmployee DetailOne-time MeritDepartment Summary

eMerit - Merit Request

Comments

Request ID00000126
StatusSaved

Date Created05/23/2022
Date Submitted

Fiscal Year2023

Preferred Cost Center for Surplus

DivisionBudget and Finance

	Core	Non-Core
Division Authorized	242,381	946
Department Authorized	212,083	828
Assigned	204,930	828
Remaining	37,451	118

Submitter/Contact Information

Attachments

Description	Attached File	Attached By	Date/Time	View
	Beginning_of_the_year_checklist.docx	Amber Andrews	05/23/2022 12:14:41PM	

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.

General Info
Employee Detail
One-time Merit
Department Summary

eMerit - Merit Request

Fiscal Year 2023

Division Budget and Finance

	Core	Non-Core
Division Authorized	242,381	946
Department Authorized	212,083	828
Assigned	204,930	828
Remaining	37,451	118

Department Summary

☐ Filter Selected
☐ Select All
☐ Un-select All

1-9 of 9

Select	Department	Description	Remaining Core	Remaining Non-core
<input type="checkbox"/>	400100	VP Budget & Finance	0.00	0.00
<input type="checkbox"/>	400200	Central Business Office	0.00	0.00
<input type="checkbox"/>	401100	Financial Mgmt Services	3.00	0.00
<input type="checkbox"/>	401101	Bursar Office	1.00	0.00

☐ Select All
☐ Un-select All
Merit %

1-9 of 9

Select	Funding Department	Funding Department Description	Home Dept	Home Department Description	Position	Job Code	Job Title	Funded FTE	Dept Mgr Merit %	Dept Mgr Merit Amount	Div Mgr Merit %	Div Mgr Merit Amount
<input type="checkbox"/>	400100	VP Budget & Finance	400100	VP Budget & Finance	00012091	C09396	Gown Risk Compliance Manager	1.000	3.50	4,230	3.50	4,230
<input type="checkbox"/>	400100	VP Budget & Finance	400100	VP Budget & Finance	00012983	C08375	Program Manager	1.000	3.50	1,739	3.50	1,739

Core/Non-Core section cannot be viewed by Department Managers.

Department Summary: 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 displaying of all employees from all departments. There is also a quick view of the remaining core and non-core balance for each department.

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.

General Info	Employee Detail	One-time Merit	Department Summary
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eMerit - Merit Request

Fiscal Year: 2023
Division: Budget and Finance

	Core	Non-Core
Division Authorized	242,381	946
Department Authorized	212,083	828
Assigned	204,930	828
Remaining	37,451	118

Empl ID	EmplID Lookup	Name	Funding Department	Department Description	Position	Job Code	Job Title	Cost Center	Merit Amount		
1	4030001770	Andrews, Amber	403100	Budget	00017748	C09119	Sr. Financial Analyst	43130005	1,000.00	+	-

This tab provides space to award one-time merits to employees. One reason to award this could be for an employee who is at the maximum of their salary grade. An employee ID, cost center and merit amount must be provided. The one-time merits will be covered by the department. The budget office will not transfer money for this award.

General Info	Employee Detail	One-time Merit	Department Summary
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eMerit - Merit Request

Fiscal Year: 2023
Division: Budget and Finance

	Core	Non-Core
Division Authorized	242,381	946
Department Authorized	212,083	828
Assigned	204,930	828
Remaining	37,451	118

Department	Description	Department Authorized Core	Assigned Core	Remaining Core	Department Authorized Non-Core	Assigned Non-Core	Remaining Non-Core	Remaining Total	Locked by Div Mgr	Dept Mgr Completed	Department Manager
400100	VP Budget & Finance	8,167	8,167						<input checked="" type="checkbox"/>	<input type="checkbox"/>	
400200	Central Business Office	8,017	8,017						<input checked="" type="checkbox"/>	<input type="checkbox"/>	
401100	Financial Mgmt Services	41,827	41,824	3				3	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
401101	Bursar Office	34,371	34,370	1				1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
401102	Accounting & Financial Rept	40,405	38,409	1,996	828	828		1,996	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
403100	Budget	26,945	26,944	1				1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
404100	Procurement Management	25,746	24,482	1,264				1,264	<input checked="" type="checkbox"/>	<input type="checkbox"/>	

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 the 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.

<input type="checkbox"/>	Gregory Argueta	<input checked="" type="checkbox"/>	401102
<input type="checkbox"/>	Jourdan Woolems	<input checked="" type="checkbox"/>	401102

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?

On the Div Mgr Control Page 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.

Set ID: DAL01
Fiscal Year: 2022
Division: Budget and Finance

	Core	Non-Core
Authorized (4%)	238,922	927
Division Override	119,461	464

Department Managers

Department	Department Description	Lock By Div Mgr	Dept Mgr Completed	Net ID	Name	Authorized Core (4%)	Division Override Core	Authorized Non-Core (4%)	Division Override Non-Core
400100	VP Budget & Finance	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text" value="bxq110130-utd"/>	Beckie Quach	8,498	4,249		
400200	Central Business Office	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text" value="axa132831-utd"/>	Amber Andrews	9,637	4,818		

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.
- There is now an option for read-only access. You can assign someone as a department manager and choose whether they have edit access. (on the Div Mgr Control page)

Override Department Merit Amounts

- On the Div Mgr Control 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. If the Division Manager needs to call back the request, they will have to ask the person in the workflow to push it back to them, they will not be able to call it back mid-workflow. 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.