ATB Increase and PTR/Merit Increase Processes for Faculty and Librarians
effective July 1, 2018

NOTE: This reference document is intended for the purpose of UTFA agreement and Business Board approval for the July 1, 2018 salary increases; it does not apply to other employee groups or other salary increases implemented in different period.

Contents
ATB and PTR/Merit Increases Process for Faculty and Librarians Overview
Step 1: Update Appointment Details (IT9009) with July 1st, 2018 ATB and PTR/Merit Increases
Step 2: Update Basic Pay Screen (IT0008) with July 1st, 2018 ATB and PTR/merit Increases
Eligibility & Important Info/Tips
HR Data Verification Report

ATB and PTR/Merit Increases Process for Faculty and Librarians Overview

Overview
These instructions are for the 1.90% ATB increase, and PTR/Merit increase processes for faculty members and librarians. The 1.90% ATB increase applies to faculty members and librarians with a June 30, 2018 annual full-time salary of less than $163,970. Every faculty member and librarian with a June 30, 2018 annual salary of more than $163,970 will receive an ATB base salary increase of 1.90% x $163,970 = $3,115 prorated for part-time in accordance with their FTE as of July 1, 2018. The July 1, 2018 ATB increase and PTR/Merit increase processes must be completed on HRIS by July 20th, 2018 monthly pay close.
This document instructs on how to Create a segment ON July 1, 2018 of the Appointment Detail (IT9009) and Create the Basic Pay (IT0008) screens in order to record the ATB increase and the PTR/Merit increase information with an effective date of July 1, 2018. (Note: In some cases, depending what the future entries were 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 records have been processed.)

There will be no automatic update by Central for this process. Departmental Business Officers will be required to update all records under Basic Pay (IT008), Appointment Detail (9009) and if applicable, Cost Distribution (IT0027) records with the respective ATB increase and PTR/Merit increase amount as of July 1\textsuperscript{st}, 2018 prior to July 20\textsuperscript{th}, 2018 monthly pay close.

Step 1: Update Appointment Details (IT9009) with July 1\textsuperscript{st}, 2018 ATB and PTR/Merit Increases

Click on the following path:

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

1. Enter employee Personnel no.
2. Select Appointment Detail in Financial Tab
3. Click on Overview.
4. Select the radio button for the employee’s record with segment ON or AFTER July 1, 2017 with future term or continuing end date.
5. Click on the **July Processing Copy** button.

The **July Processing Copy** button has been updated and will automatically calculate the 1.90% ATB, pro-rated for part-time faculty and librarians in accordance with their FTE.

**Copy Appointment Detail Screen Populates (Automatically)**

1. Verify the start date is July 1st, 2018.

2. The 1.90% ATB increase is calculated and populated automatically.
3. In the next available line, select Type – 03 PTR/Merit for the 95% PTR Pool

4. Enter the amount of the PTR effective July 1st, 2018. (Please round up to the nearest dollar).

5. If applicable, select Type – 18 Merit Supplement for the 5% Merit Pool on the next available line

6. Enter the amount of the Merit Supplement effective July 1st, 2018. (Please round up to the nearest dollar)

7. Click or press ENTER

The Appointment Detail screen can only accommodate up to a maximum of 5 Types of Salary Change.

In the event that a faculty member or librarian has other pay changes effective July 1, 2018 (such as Change in FTE) in addition to the existing entries and will exceed the maximum allowed type of salary change, you need to combine the PTR/Merit components and annotate the record accordingly.

Further information on different scenarios is detailed on the Eligibility & Important Info/Tips section of this document.

8. Click Save.

Note the Pay Scale Level and Total Annual Salary.
END OF STEP NO. 1 – UPDATE APPOINTMENT DETAIL (IT 9009) SCREEN WITH JULY 1ST, 2018 ATB AND PTR/MERIT INCREASES

Step 2: Update Basic Pay Screen (IT0008) with July 1st, 2018 ATB and PTR/merit Increases

If the employee is on Maternity DO NOT update Basic Pay 0008. This is a Central Payroll function. Department must update the Appointment Detail (IT9009) screen with the corresponding ATB and PTR/Merit increases and inform Central Payroll Services.

From the Maintain Master Data Screen:

1. Enter the effective date of the salary change in the FROM field - **01.07.2018**
2. Select Basic Pay in the Financial Tab
3. Click on Create

Create Basic Pay Screen Populates (Automatically)

1. Verify the default data.
2. Enter the Level
3. Enter the Annual Salary
4. Click ✔️ or press ENTER.
5. Click to SAVE.

END OF STEP NO. 2 – UPDATE BASIC PAY SCREEN WITH JULY 1ST, 2018 ATB AND PTR/MERIT INCREASES
Eligibility & Important Info/Tips

1. Faculty members and librarians who commenced employment with the University prior to (but not including) July 1st, 2018 will be eligible for 1.90% ATB increase.

2. The following are not eligible for the 1.9% ATB increase and July Processing Copy button will not work.
   a. Principals and Deans
   b. Non-Tenure Stream Clinicians
   c. Faculty members and librarians on unpaid leave on July 1, 2018

3. The July Processing Copy button will not work for Cross-appointed Academics when their main appointment is non-Academic. The calculation must be entered manually.

4. If there is an existing segment AFTER July 1st, 2018 in the Appointment Detail screen, the segment must be deleted first in order to process the July 1st, 2018 ATB and PTR/Merit increases amount. Then, re-create the deleted segment.

5. If there are multiple segments due to multiple funding or cross-appointment (Academic to Academic), the July Processing Copy button must be selected for each segment in order to automatically calculate the flat dollar amount based on the FTE or CC/CFC percentage allocation.

6. Rounding issues due to multiple segments in Appointment Details (IT 9009) screen should be adjusted accordingly by the Business Officers.

7. In the event that a faculty member or librarian has a position change or change in FTE% effective July 1, 2018, the 1.90% ATB increase amount will have to be manually calculated.

8. In the event that a faculty member or librarian has an additional other pay changes effective July 1, 2018 (such as Percent of Time, Anomaly Adjustment, or Promotional Increase) and will exceed the maximum allowed type of salary change, add the PTR/Merit and the Merit Supplement amounts and enter as 1 line item – 03 PTR/Merit.
HR Data Verification Report

Run the 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.