

MEMORANDUM

DATE: August 10, 2007
TO: Administrative Support Personnel
FROM: Priscilla Cantu, Director
RE: 2007 Faculty and Appointed Personnel Merit/Market/Equity Worksheet Instructions

This memorandum provides information and instructions to assist you in completing the Merit/Market/Equity adjustment worksheets for faculty and appointed personnel. Guidelines for the adjustment are outlined in the Salary Adjustment Information/Guidelines available at:

http://www.hr.arizona.edu/04_cb/comp/SalAdjGuidelines.pdf

GENERAL INSTRUCTIONS

The worksheets:

- will be due to Systems Control by Monday, September 10, 2007,
- list individuals who are eligible to receive a MME adjustment, and
- will be available on the Financial Service Office (FSO) Information Services Web (ISW). (See 'Accessing the Worksheets' section below).

THE COLLEGE/UNIT ROLE

- print and complete the worksheets,
- add eligible employees who did not print,
- obtain department administrator's and/or college signature(s), and
- return **ALL** worksheets to Systems Control including those without changes.

ELIGIBILITY CRITERIA

- Faculty and appointed personnel excluding Research Associates, Visiting Faculty and Clinical Assistants,
- on the payroll and in a benefits eligible position as of January 2, 2007, and
- the employee's performance is not less than satisfactory.

TIMELINE

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|---|----------|--------------------|
| • Worksheets available in ISW | Tuesday | September 4, 2007 |
| • Worksheets & RBCs due to Systems Control | Monday | September 10, 2007 |
| • Increases available for review in PSOS & ISW | Tuesday | September 18, 2007 |
| • Deadline to contact Systems Control for corrections | Thursday | September 20, 2007 |
| • Effective date of MME adjustments | Sunday | July 1, 2007 |
| • First paycheck reflecting new rates | Friday | September 28, 2007 |

TEMPORARY ASSIGNMENTS

To increase permanent lines for employees who are funded from state and locally allocated accounts and who will receive Merit/Market/Equity adjustments while on temporary assignment:

- submit a Request for Budget Change (RBC) to Systems Control no later than Monday, September 10, 2007 to ensure the funding is in place when the individual returns to his/her permanently funded position.

UNPAID LEAVES

To increase permanent lines for employees who are funded from state and locally allocated accounts and scheduled to receive Merit/Market/Equity adjustments upon return from leave without pay status:

- submit a Request for Budget Change (RBC) to Systems Control no later than Monday, September 10, 2007 to ensure the funding is in place when the individual returns to his/her permanently funded position.

FUNDING CHANGES

To change account information:

- complete a PAF and PCF for the individual receiving the increase,
- adjust the salary on the PAF to include the total adjustment,
- circle the appropriate adjustment reason(s) on the PAF,
- if there is more than one adjustment reason, write the amounts for each in the comments section of the PAF,
- restate the funding on the PCF,
- write 'PAF' next to the individual's name on the worksheet, and
- attach the signed PAF/PCF and RBC (if applicable) to the worksheets.

COMPLETING THE WORKSHEETS

Blank spaces are provided for merit market and equity increase amounts.

- write the ANNUAL increase amount in the applicable column(s).
 - *The annual increase is the amount the employee would receive over one fiscal/academic year at their budgeted FTE. (See example below)*

The last column of the worksheets includes a space for the New ANNUALIZED salary.

- write in the New Annualized Salary for individuals receiving adjustments. (See example below)
 - *The new annualized salary is the amount the employee would receive over the course of one fiscal or academic year at 1.00 FTE including the adjustment(s).*

CALCULATING THE NEW ANNUALIZED SALARY

- The ANNUAL increase amount divided by the FTE plus the ANNUALIZED salary equals the new ANNUALIZED salary.
- The Perm FTE should be used for the New Annualized Salary calculation unless the respective line has temporary funding only, in which case the Emp FTE should be used.

Example:

Annualized Salary	Perm FTE	Emp FTE	Annual Increase Amount	New Annualized Salary
\$25,000	1.00	1.00	\$500	\$25,500
\$30,000	.50	.50	\$500	\$31,000
\$35,000	1.00	.50	\$500	\$35,500
\$40,000	.50	1.00	\$500	\$41,000
\$45,000	.00	.50	\$500	\$46,000

SUPPLEMENTING THE MERIT/MARKET/EQUITY POOLS

- Increases may be supplemented by departments with the caveat that any use of vacancy savings should be included in the adjustment plans submitted to the President, Provost or appropriate Senior Vice President.
- A Request for Budget Change should accompany the worksheets to supplement the state and budget style pools. The funding should be transferred to line 965 in the respective College/Vice President's budget. The marginal ERE rate of 17% will be required for state or locally allocated account transfers from non-personal services.

ACCESSING THE WORKSHEETS

The worksheets will be available on the ISW website and may be accessed at: <https://www.fso.arizona.edu/isw/>

- click on Electronic Reports,
- click on the Departmental Payroll Administration Folder, and
- print the following files:

Merit/Mkt/Equity Worksheets-Administrators
Merit/Mkt/Equity Worksheets-Faculty
Merit/Mkt/Equity Worksheets-Professionals

QUESTIONS???

Completing the worksheets:
Elizabeth Curbelo 621-7712

Supplementing the Merit/Market Pool:
Kathy Whisman 621-3324