



University of Virginia 2021 Merit Implementation Guide For Managers and Merit Delegates

University Staff, Classified Staff, PRS and A&P Faculty
2021 Merit Planning Cycle

Purpose

The purpose of this guide is to provide an overview of the 2021 University of Virginia Merit Program and information on how to implement the program for University Staff, Classified Staff, Professional Research Staff (PRS) and A&P Faculty.

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Executive Summary

The University of Virginia encourages the recognition of strong performance and achievement through the use of merit pay increases. This Guide offers merit program information that apply to the **Academic Division**, for University Staff, PRS, and A&P Faculty employee types.

Key Takeaways:

- The University utilizes various merit programs tailored to the individual business needs of our schools, units, or departments.
- Individuals hired after December 31, 2020 are not eligible for a merit increase.
- The merit process for University Staff, Classified Staff, PRS, and A&P Faculty will occur in Workday.
- For eligible Classified Staff, an across-the-board increase will be centrally processed in Workday by UVA HR.
- For Academic Division Teaching & Research (T&R) Faculty, refer to the UVA Merit Guidance for Faculty available on the UVA HR [Academic Division Merit Process 2021](#) webpage.
- For **School of Medicine** T&R Faculty, merit processing will occur in Anaplan.
- The **Medical Center and the University Physicians Group** utilize a different merit process which occurs later in the year.

This Merit Guide includes important information, eligibility and key dates for merit programs. Improvements and new functionality have been added this year to the merit process in Workday based on user feedback in prior merit cycles. Detailed information on the Workday process is enclosed.

Once you have reviewed this Merit Guide and any supplemental guidance provided by your school or unit, follow the instructions through the merit process in Workday (see the Merit Job Aid, available 5/21 on the [Academic Division Merit Process 2021](#) webpage, for additional details). If you have questions about the merit plan design or approach selected for your department or school, please reach out to your school or unit leadership. For questions about the merit process in Workday, please reach out to your HR Business Partner, or to the HR Solution Center by email (AskHR@virginia.edu) or phone (434.243.3344).

Program Overview and Key Dates for Merit Programs Across Grounds

Awarding Merit Increases in 2021: This year's merit process allows each school and unit flexibility and local discretion in crafting allocation approaches for how merit increases are awarded. This may include different merit pool amounts based on budget availability (subject to review by respective Vice President, SVP, or Dean). Details and local process for merit pools will be managed and communicated by your School/unit leadership.

New Functionality for 2021: UVA HR is excited to offer the following enhancements to the Merit Plans in Workday:

- Annualized salary for non-exempt/hourly employees and the equivalent hourly rate for exempt/salaried employees have been provided on the Merit Grids for University Staff Merit Plans.
- University Staff exempt and non-exempt employees are included in the same merit process.
- Improved reporting allows leaders to report on multiple merit processes in the same report (report name: Merit Process - Employee Details - Shared Participation - UVA - Combined Plans).
- Pay increases not related to merit may be entered at the time of merit via Additional Adjustment functionality.
- Professional Research Staff is now included in the Workday merit process.
- A&P Faculty and PRS are in a combined merit plan to account for different merit increase timelines.
- Merit delegates can now see the pay range minimums and maximums.
- There is no defaulting of merit percentages / amounts based on ratings. Managers can use the Autofill button to populate the merit increases, if needed.
- There is a Total % Increase indicator on the side panel to show the combined percentage for merit, additional adjustment, and bonus.

Multiple Merit Plans: There are four unique merit plans in Workday. For this reason, some managers will receive more than one merit plan notification in their Workday inbox. Separate plans exist for the following groups:

- University Staff
- Professional Research Staff and A&P Faculty
- School of Medicine – University Staff
- School of Medicine – Professional Research Staff and A&P Faculty

Eligibility:

- Individuals hired after December 31, 2020 are not eligible for a merit increase.
- University Staff employees should have a completed Performance Appraisal or Narrative Review for CY2020 to be eligible (note that in the SOM, merits should be based on the FY2020 Evaluations).
- Employees should have successfully completed their probationary period – some discretion is given to leaders to provide increases during probationary period (UVA MC/UPG transfers to UVA Academic are reviewed for eligibility on a case-by-case basis).
- Eligibility may vary for employees who have a recent offer, promotion, or retention agreement. Refer to the employee’s offer letter for additional guidance.
- Employees must be actively employed as of July 5, 2021.
- Employees on leave without pay are not eligible for merit increases during this processing window; however, they may receive their merit increase after they have returned from leave. Those increases must be manually entered by the manager in Workday. Note that employees on a **leave with pay** will be included in the merit plan grid.
- Classified Staff who converted to University Staff after June 10, 2021 are not eligible.
- Classified Staff will receive a 5% across-the-board pay increase effective June 10th as outlined by the Virginia Department of Human Resources Management. Pay increases may not take staff above the maximum of their pay range; if an employee is at or above the pay range maximum, they will receive the balance of their increase in the form of a lump sum bonus. To be eligible for the increase, Classified Staff must have received a “(2) Inconsistent” rating or above, or within the SOM, a “(2) Fully Meets Expectations” or above rating on their 2020 Performance Appraisal.
- UVA HR will centrally process increases for Classified Staff; therefore, managers do not need to award merit through Workday for this population of employees.

Pay Change Effective Dates Across Grounds (includes T&R Faculty, MC, and UPG):

Employee Type	Effective Date	Check Date
Classified Staff	June 10, 2021*	June 25, 2021
University Staff	July 5, 2021	July 23, 2021
A&P Faculty, 12-Month T&R Faculty & PRS	July 25, 2021	September 1, 2021
Non-12-Month T&R Faculty	August 25, 2021	October 1, 2021
Medical Center	September 19, 2021	October 8, 2021
University Physicians Group	September 19, 2021	October 8, 2021

**Classified Staff effective date is in the middle of a pay period; Workday will automatically prorate the increase based on the June 10th date.*

University Staff, Classified Staff, PRS, and A&P Faculty Key Dates (covered in this Merit Guide):

Dates	University Staff/Classified/PRS/A&P Faculty
May 21	Merit Process opens in Workday Manager Self-Service for University Staff, PRS, and A&P Faculty.
May 24 – July 4	Soft freeze on non-competitive salary increases – work with your HRBP/Compensation team on non-competitive increases to ensure the merit grids update.
June 10	Classified Staff increases effective date.
By June 25	Leaders and/or Delegates finalize University Staff, PRS, and A&P Faculty merit plans in Workday.
July 5	University Staff increases effective date.
After July 25	Salary adjustments for PRS and A&P Faculty may be shared with affected employees.
July 25	PRS and A&P Faculty increases effective date.

System & Process Overview

Workday is the system used for merit planning and processing for University Staff, PRS, and A&P Faculty. (Classified is processed centrally by UVA HR in Workday)

Program Launch: When the merit program is launched by HR, managers/merit delegates (anyone with 1+ direct reports) will receive a task in their Workday inbox. Note that some managers may receive more than one inbox notification. Merit activity within Workday cannot be started until the notification is received. It is recommended that you “favorite” this inbox task in Workday; see Job Aid for details.

Step 1	Open your merit plan(s) in Workday and confirm that the employees listed represent those eligible for participation in the merit process.
Step 2	Note the approach you will use to award merit increases as determined by your school or department leader. Work with your HR Business Partner for additional guidance.

Special Note: University Staff will be allowed to exceed the maximum of the salary range this year. While we encourage leaders to provide merit in the form of a lump sum payment for

employees who exceed the maximum of the salary range, we are allowing full merit increases this year in the form of a base pay increase, should leaders choose to do so.

Approvals:

- Leaders cannot finalize their merit plan until all supervisory levels below are finalized.
- Leaders can view merit increases for subordinates’ teams.
- Justification is required for employees given no increases (0%) who are rated higher than effective or increases of more than 10%.

The Overall Budget (Pool) and Spend Indicator (over-budget example displayed below) will be dynamically updated as you enter merit and lump sum amounts.



The budget (pool) amount shown is calculated in Workday– it represents a percent of salaries at the supervisory organization level. The 2021 Merit Pool populated in Workday is 5% however, schools and units may opt to use a lower % budget this year.

Merit Delegates & WD Supervisory Org Structure

- Managers with direct reports who are managers (Manager’s Manager) will receive additional features in the merit table. Managers or leaders in the Supervisory Organization can complete the merit grid for subordinate managers on their behalf.
- If a manager is not able to complete their merit grid, they have the ability to delegate this work to a Workday Merit Delegate in the University:
- Workday Merit Delegates may be selected and assigned this capability in Workday – this may be an employee in the organization who currently holds the security role of Delegate, or a new Workday Merit Delegate may be added via the normal Workday business process. Please see the Merit Job Aid (available 5/21 on the [Academic Division Merit Process 2021](#) webpage) for details.
- Note that if a Merit Delegate is needed at a certain level of the organization to complete merit grids down the organization, they must be set up as the Merit Delegate for leaders at that level in the organization or higher.
- For Workday Merit Delegates added specifically during the merit process, access will be removed after the merit process is complete.

Workday Merit Reports

There are several custom merit reports available to leaders and merit delegates. These reports can assist in merit planning or to monitor subordinate leader progress.

- University Staff Date of Last Pay Change: Managers/merit delegates can use this report to identify those within their areas who received any compensation change (promotion, retention, etc.) since 2019.
- Merit Process – Employee Details – Shared Participation - UVA: Spreadsheet of all employees within the supervisory organization for managers. The file includes fields in the merit table and space for documenting merit.

Training & Support

1. Workday Merit Training for Managers and Merit Delegates

Virtual Workday Merit Training sessions are designed to prepare managers to complete the 2021 merit cycle. All sessions will be held virtually via Zoom. The Workday Merit Training Webinar for Managers and Merit Delegates includes the virtual merit session, merit job aid, and merit guidelines. [Register for all webinars using this link](#). Dates/times are:

- May 21, 1:00 - 2:00 pm
- May 24, 11:00 - 12:00 pm
- May 26, 2:00 - 3:00 pm
- June 2, 11:00 - 12:00 pm
- June 3, 10:00 - 11:00 am

2. On-Demand Training

In addition to the instructor-led offerings above, you can take the asynchronous (pre-recorded) [Digital Self-Guided Course](#) available in Workday Learning.