



University of Virginia 2023 Merit Guide & Instructions

Teaching and Research Faculty 2023 Merit Planning Cycle

Purpose

The purpose of this guide is to provide an overview of the 2023 University of Virginia Merit Program, and information and instructions on how to implement the program for Teaching and Research 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. Across Grounds, the University utilizes various merit programs tailored to the individual business needs of our schools, units, or departments.

This Merit Guide offers merit instructions that apply to the **Academic Division**, for Teaching and Research Faculty.

- Information on all UVA Academic Division Merit Processes is available on the UVA HR [Academic Division Merit Process 2023](#) webpage.
- For School of Medicine T&R Faculty, merit processing will occur in Anaplan for the first time.
- A&P Faculty and Professional Research Staff merit will be administered via Workday.

This Merit Guide includes important information and key dates for merit programs across Grounds, as well as specific dates for the Teaching and Research Faculty merit process.

Once you have reviewed this Merit Guide, follow the instructions through the merit process. If you have questions, please reach out to your HR Business Partner.

Key Dates for Merit Programs Across Grounds

Pay Change Effective Dates Across Grounds (includes University Staff, MC, and UPG):

Employee Type	Effective Date 2023	Check Date 2023
Classified Staff*	TBD	TBD
University Staff	July 3	July 21
A & P Faculty, 12-Month T & R Faculty & 12-Month PRS	July 25	September 1
Non-12-Month: T & R Faculty and non-12-Month PRS	August 25	September 29
Medical Center**	September 17	October 6
University Physicians Group**	September 17	October 6

**No guidance has been issued from DHRM regarding Classified Staff Pay Increases for 2023 – timing will be shared once available.*

*** Medical Center and UPG process handled outside of this document.*

Teaching and Research Faculty Key Dates:

Dates	T&R Faculty
By May 29	T&R Faculty Merit Workbooks Available in SharePoint (or Workday currently in the process of converting process to Workday Drive)
By July 6	Schools finalize Faculty Merit Workbooks & Narrative Plans for Provost's Office review
By July 21	Provost Office reviews and approves salary recommendations
After July 25	Salary adjustments may be shared with faculty
July 25	Effective Date: 12-month faculty
September 1	Check Date: 12-month faculty
August 25	Effective Date: Non-12-month faculty
September 29	Check Date: Non-12-month faculty

Teaching and Research Faculty Merit Spreadsheet Instructions

What's in the Spreadsheet?

Each Excel file will have multiple tabs:

Academic Faculty Merit Tool Tab	This is where all the merit increase recommendations will be entered.
Summary Tab	As merit increases, bonuses, and supplements are awarded on the Faculty Merit Tool tab; the summary tab will update with cost and average increase and bonus information.

Spreadsheets are password protected. This is to protect the integrity of the data and to facilitate a smooth upload process to Workday.

Color reference key:

White – Data from Workday (Cannot be modified)
Yellow – Data entry (input) column
Orange – A formula / calculation (Cannot be modified)
Red – Error with record – Review all columns on that row for “ERROR” text
Grey – Record will not be uploaded – Do not upload is checked.

File Sharing

Faculty Merit Spreadsheets will be shared/distributed and submitted through the University's secure Office 365/SharePoint site.

- A folder will be available for each School/Unit and secured for usage by the designated Merit Delegate or Leader.
- When the spreadsheets are available, an email will be sent to authorized users with a link and instructions to access their worksheets.
- Should Delegates or Leaders experience issues accessing Office 365, the spreadsheet can be sent via email.
- Note that additional files may not be uploaded back to the SharePoint site. See the “Working in SharePoint” section below for tips

Working in SharePoint

For best results, it is highly recommended that you open the spreadsheet file directly from SharePoint into Excel. Make your edits and then save your file back to SharePoint in the same session. This method will take advantage of SharePoint's version history functionality to be able to tell who edited the files and when and will also allow multiple people to collaborate on the file at the same time (if desired).

SharePoint Getting Started Guide

1. Locate your file in SharePoint (<https://myuva.sharepoint.com/sites/HRMerit/Spreadsheets/>).
2. Click on the file name.
3. Your browser will prompt you to confirm you want to Open Excel. Click Open/Okay.
4. At this point, Excel and SharePoint are connected.
5. Make edits/updates to the file following the [worksheet instructions](#).
6. When you are done making updates, use the Save icon (top-left of Excel) to save your changes. Alternatively, you can press Ctrl-S on your keyboard to save. SharePoint will also periodically auto-save.
7. Close the file.

If you need to make additional changes later, repeat the process above.

CAUTION: Downloading a copy of the file and emailing it to others or working with an offline copy is discouraged. If you need others to collaborate or view the file, they can be granted access to SharePoint instead. Contact your HR Business Partner about granting additional access.

Worksheet Instructions

Step 1: Review Current Employee Information

- All employee data has been provided as of 5/25/2023.
- The worksheets can be sorted and filtered however is the most helpful to the user.
- Columns A-Q are informational only and are not available for edits.
- There are two columns that calculate the 9-Month Base Salary. **9-Month Base Salary (Based on actual FTE)** and **9-Month Base Salary (Based on 1.0 FTE)**
- Faculty with future dated retirements and terminations will be included on the file and are noted in column L outlining their future dated termination or retirement.

Step 2: Award Merits

- Starting in column R, merit % increases can be awarded to faculty as a % of salary.
- Note that only yellow highlighted columns are open for edits.

Step 3: Award Bonuses

- In column V, merit bonuses can be awarded as a dollar amount.

Step 3a: Recent Promotion/Tenure Approval

- If a promotion or tenure recommendation was approved, please indicate 'YES' in column W.

Step 4: Notes and Justification

- In column Y, enter any notes and/or justifications for the following:
 - 0% merit increases (exp. merit included in recent salary change and documented)
 - Increases of greater than 15%
 - Bonuses over \$10,000
 - Increase factors other than merit (such as: Retention, Equity, Market, P&T) must be outlined in the notes section; exp – 3% for merit plus 10% for retention.

Step 5: Administrative Supplements/Allowances

- Starting in column AA, current Administrative Supplements/Allowances have been outlined:
 - Please review current Administrative Supplements/Allowances to ensure accuracy of amounts and end dates.
 - Expected End Dates do not stop payment of supplement in Workday.
 - Actual End Dates will stop payment of supplement in Workday.
- Current supplement amounts may be edited or ended starting in column **AA – Admin Supp/Allowance 1 - % Change**.
 - Past end dates will not be allowed, and an error will occur – past corrections should be entered directly into Workday.
- Any new administrative supplements must be entered in Workday directly, outside of this worksheet following the normal business processes.

Step 6: Review Final % Increase and Summary Tab

- Starting in column BF, review the New Total Base Pay Information with and without supplements.
- Review your summary tab to ensure the average increase % is within the budgeted amount:
 - 5% Budget Pool for Academic Schools
 - You may use the check box to indicate if bonuses should be included in the overall Pool calculation.

Step 7: Do Not Upload

- Mark Y in the last column **BM – Do Not Upload** only if the employee data column should *not* be uploaded into workday as part of the faculty merit process.
- This may be needed if the current employee data has changed since the spreadsheet was created or differs from the employee data in Workday at the time of the merit increase. In this case, the merit increase may be entered manually in Workday.

Additional Guidance

Merit Eligibility

- Faculty hired before January 1, 2023, are eligible for a merit increase. New hires hired on January 1st or later will not be included on the worksheet.
- Employees who have a recent offer, promotion or out-of-cycle salary change that included merit may not be eligible. Refer to the employee's offer letter for additional guidance.
- Must have a completed Faculty Annual Review.
- Must be actively employed as of the Faculty Merit Effective date.

- 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 or delegate in Workday.

Approvals

- Schools are required to submit their finalized worksheets directly into SharePoint. The Provost's Office will review and approve, and they will reach out directly to the School with any questions or feedback. It is the School/designee's responsibility to update the worksheet directly in SharePoint.
- Prior approval from the appropriate senior executive (EVP, Provost, or President) is required for schools desiring to provide total increases exceeding a 5% pool.
- The 2023 Merit Pool populated on the worksheets reflects 5% however, schools may opt to use a lower % budget.
- Increase recommendations of zero percent (0%) or greater than fifteen percent (15%) require a narrative justification and supporting documentation.

For additional guidance regarding the faculty merit process please be sure to refer to the 2023-2024 Faculty Merit Compensation Memorandum sent by Provost Baucom to School Deans on May 12, 2023.