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Entering Merits in HCM

This document is to assist you when using the Merit page within PeopleSoft HCM. To begin entering Merits, you must first open an internet browser.

 Signing onto the HSC Portal

To access Human Capital Management (HCM) v9.1, access the home page (www.UTHSCSA.edu) in Internet Explorer and click on the Quicklinks from the top of the page, then select inside.uthscsa (portal).

- Enter your UTHSCSA Domain User ID and Password. Click on Sign In.
Accessing the PeopleSoft HCM Merits Page

From the Enterprise Menu:
- Click HSC Business Applications
- Human Capital Management
- Human Capital Management

The PeopleSoft HCM page will open in a new window.
- Click on HSC Custom Components
- Click on HR ➔ Use ➔ Merit Increases
EC Target Allocation

The EC office will assign a merit target allocation to each department in their area. Departments will see the merit target amount that was allocated to their department at the top of the merit page.

Viewing Data

A Search page will open. Enter a DEPTID (ex: D1000) in the Department field and the current fiscal year.

**Note:** User may leave the DEPTID field blank to get a list of all the DEPTIDs they have access to.

- Click Search.

A list of all eligible employees will be displayed for the DEPTID entered above. You cannot add employees to this listing.

**Note:** Only those employees that meet the merit requirements will be listed on the HCM Merit Increases page. Additional Technical Instructions will be provided by the Budget Office.
**Entering the Proposed Annual Rate**

The HCM merit page was designed to capture merits at the position level. The proposed annual rate should reflect the full HSC funded portion of the position regardless of the funding owner. However, the department user must include a comment in the Dept/EC Merit Note indicating how much, if any, of the merit will be funded by an outside department and include the name of the outside department.

- Enter the Proposed Annual Rate for each employee that will receive a merit increase.
  Users may enter merit notes if needed.
The following fields will be calculated in HCM based on the amount entered in the Proposed Annual Rate field:

a) Dollar Increase = \((\text{Proposed Annual Rate} - \text{Current Annual Rate}) \times \left(\frac{\text{Effort}}{100}\right)\)

b) Percent Increase = \(\left(\frac{\text{Dollar Increase}}{\text{Total Compensation}}\right) \times 100\)

c) Proposed Compensation Total = \((\text{Proposed Annual Rate} \times \left(\frac{\text{Effort}}{100}\right))\)

If the proposed Annual Rate is greater than 6% or is lower than 0%, a warning message will display.

User will not be able to save the page if any of the Proposed Annual Rates exceeds 6% or goes below 0%. User must adjust the Proposed Annual Rate so that the Percent Increase falls between 0% to 6%.

- Click OK
If the proposed Annual Rate is entered with decimals numbers, a warning message will display. The User will not be able to save the page if any of the Proposed Annual Rate amounts have decimal numbers. User must enter whole dollar amounts.

- Click OK

- When user has completed entering the merits for a DEPTID, click Save.

The following fields will be calculated based on the Dollar Increase amounts entered for that DEPTID:

a) Merit Assigned Total = Total amounts entered in the Dollar Increase field for that DEPTID
b) Merit Under/Over Total = Merit Target – Merit Assigned Total

The HCM system will calculate if the user has under/over allocated merits based on the merit amount that was assigned by their EC office. Users must stay within their merit target.
Running a Query in HCM

Users may run a department query to gather all merit data for one DepartmentID or for all the DepartmentID’s the user has access to.

- Click on Reporting Tools → Query Viewer

- Enter HSC_DEPT_PROPOSED_MERITS
- Click Search.

- Click on the Excel link. This will allow you to sort the report if necessary.
- Enter a DEPTID or % (used as wildcard) in the Dept ID field and enter the budget year in the Year field. When using the wildcard (%), you will receive a list of all departments you have access to.
- Click View Results.

Query results will list all eligible employees who received merits and those that did not receive a merit increase.

**Note:** Departments will not need to enter a funding row in the employee/position funding page. During the Roll-Forward process of the Budget Cycle, the merit row will automatically be inserted on the employee/position funding page and the job data page in HCM.

However, if the funding source needs to be updated, the department will only need to enter this change on the employee/position funding page.