

## Academic Merit and Promotions Funding Process

### BACKGROUND

Academic merits and promotions are funded via the Scrubber Process (Scrubber). The Scrubber correlates academic merit and promotion actions from APHID with changes in academic employee salary transactions in PPS that are identified as merits (Action Code 04) and promotions (Action Code 10). The Scrubber generates a report which calculates the amount of merit and promotion funds needed. This report is then uploaded into KFS to allocate the funds to the departmental accounts. The Scrubber is run by the Financial Services team in the Office of the Chancellor and Provost on a weekly basis beginning in February through the first week of July and resumes after fiscal close through September to fund any late approvals.

### WHY CHANGE?

The Scrubber is a custom application written in Visual Basic and its code is no longer supported or maintained. With the implementation of the Step Plus Merit Program, substantial changes to APHID Action Tracking system were required. The Scrubber is incapable of accommodating these changes and can no longer correlate the data from either system to accurately produce the necessary funding report.

In addition to the technical issues, the Scrubber's allocations were often less than the amount needed to fully fund an employee's merit or promotion. For example, if a professor charges a portion of their time to a research grant, the percentage of time on their general fund distribution is reduced to reflect that effort. In these cases, the Scrubber would only fund the reduced general fund distribution. The unit would then need to process manual budget adjustment documents to fully fund their merits or promotions. The need for manual documents resulted in an increased workload for deans' office and central campus staff.

BIA, Academic Affairs, and IET staff have developed a new merit and promotions funding process which will be implemented this summer.

### *Benefits of the New Academic Merit and Promotion Funding Process*

- Accurate merit and promotion funding allocations. Units will receive the full merit or promotion funding for an employee based on the employee's indefinite general fund payroll distribution. This will reduce deans' office staff and BIA workload as units will no longer need to prepare additional budget adjustment documents to fully fund merits and promotions.
- Employee benefit funding will be calculated and allocated at the same time as salary funding.

- Units will have the ability to review salary and benefit allocations allowing deans office and central campus staff to proactively correct errors.

*Academic Merit and Promotion Funding Process Schedule*

- The Scrubber will not run before the end of the 2014-15 fiscal year.
- The Academic Merit and Promotion Funding Process will run once an academic year after fiscal close. Funding will be allocated to departmental accounts in the month of September in order to be reflected in the 1st quarter financial reports.
- All academic merit and promotion actions fully approved in APHID and PPS by August 31, 2015 will be included in the new funding process.
- In early September, deans' offices will be provided with a Merit and Promotions Pre-Allocation Report which will be used to ensure all known approved merit and promotions are included as well as to correct any errors in accounts or amounts.
- If merit and promotion actions are approved after August 31, 2015, units will need to manually fund these actions per the existing process.