

UNIVERSITY OF ALBERTA

PeopleSoft HCM

Creating Staff List and Academic Increment Pool for Librarians (LEC)



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**Creating Staff List and Academic Increment Pool for Librarians (LIB)**

Each year, Faculty and Departments are required to review the performance of eligible staff members. The purpose of this report is to determine who are eligible and the number of increments (increment pool) available for distribution. The reports are prepared on the basis of information known at the time. Amendments may be necessary as additional information is made known.

In this topic, you will be provided the steps involved in the generation process of the LIB Increment Pool which creates the ‘Staff List” and the timelines in which steps need to be completed.

In determining the number of staff eligible to be considered for increments, the following rules apply:

* All eligible staff members covered by the LIB agreement
* Staff members who are at the salary cap are NOT included in the increment pool but are kept on the staff list for review
* Staff members who joined the University from July 1, 2018 to October 31, 2018 eligible for a full increment effective July 1, 2019 and are counted in the increment pool
* Staff members who join the University on Oct 2, 2018 through June 1, 2019 receive a pro-rated increment effective July 1, 2019 and will NOT be included in the increment pool
* Staff members who join the University on June 1 – June 30, 2019 will not normally be eligible to receive an increment and NOT included in the increment pool
* Staff members who are on full or partial disability leave are NOT included in the increment pool. The staff member should be moved from the staff list and reported on the final submission report at the bottom of the template
* Staff members on Leave for more than 6 months of the review year are included in the increment pool but would receive an increment of 0C (On Leave).
* For those staff members on Leave for less than 6 months of the review period receive regular increments and included in the pool calculation
* Leaves would include Medical, Childbirth, Parental, CCEL, and Professional & Education.
* Retiring staff members are treated differently depending on the retirement date and the phased post retirement option. Read **Article 18** of the LIB Agreement for program details

**REMINDER**:

* The review period - **LIB** – January 1, 2018 – December 31, 2018
* Increment Effective Date – July 1, 2019

**General Information**

Ensure you have the most recent versions of the following documentation for quick reference:

* LIB Agreement
* LIB salary scales and steps

**Timeline:**

* After Feb 1, 2019 - Begin the process of report generation
* Final Pool Review for Faculties/Depts to be emailed to Employment Services by Feb 28, 2019

**LIB Agreement Timeline**

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| **Suggested Timeline** | **Process Step** |
| By January 31 | LIB submits completed Annual Report to Supervisor  |
| By February 28 | Submit pool calculation to Employment Services for review  |
| Feb – March 31 | Performance reviews with LIB and Supervisor |
| April – June  | LEC reviews performance evaluations |
| By May 31 | Final Pool summary to Employment Services for review |
| By June 30 | Chair of LEC informs LIB of final increment decision |
| By July 31 | Chair of LEC will distribute a list of Librarians by rank  |

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| **Step 1: Run Academic Increment Report – Current Evaluation Year**Navigation Path: **Main Menu > Workforce Administration > Salaries\* > Report > Acad Incr/Prom Rpt\* > Select your Run Control ID INCR\_RPT or Add a New ID**1. **Salary Adjustment Date** is the date the increment recommendations from the FEC will be effective.
2. Ensure you select the Evaluation Committee Code from the drop down menu for the group you want to run the report for. Select **Evaluation Committee Code** **903**.
3. In the **Pool Group** field select the Faculty you have access to.
4. Click SAVE.
5. Click **RUN**.
6. On the **Process Scheduler Request** ensure the report returns in an XLS format.

 |
| 1. Click OK.
2. Click on **Process Monitor** link.
3. When the report runs to completion, you should see a Run Status of **Success** and a Distributed Status of **Posted**. The report is ready for viewing.

10. Click on Go back to Acad Incr/Prom Rpt\* link at the bottom of the Process List and click on Report Manager or Navigate as stated in Step 2. |
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| **Step 2: Create Pivot Table (if Needed)** |
| 1.
 | Navigation Path: **Main Menu > Reporting Tools > Report Manager** |
| 1.
 | Click the **ZHR\_INCR\_PRO – Academic Increment Promotion.xlsx** report. |
| 1.
 | Before creating the final report template, perform several data sorts to remove those that are not considered eligible for an increment**Create Pivot Table – Headcount*** First Tab is Base Data and should not be changed. Highlight and copy the entire spreadsheet and SAVE to a new tab
* Delete the top 9 rows of the spreadsheet on Tab 2.
* Rename Tab 2 to Staff List Final
* Highlight all rows and click **Insert**
* Click **Pivot Table** then click **OK**. This will create a new Tab.
* Highlight Empl ID and drag to VALUES box
* Highlight Rank and Step on Rank drag to ROWS box
* Rename Tab to Headcount Summary

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|  | **TIP** Create separate tabs:1. **Base Data** – Initial Increment Report - Use to balance back to – Do Not change this data
2. **Headcount Summary** is created by the Pivot table from the Staff List Final
3. **Staff List Final** – Use this list for the copy and paste to the Employment Services Template
4. LIB’s at Ceiling
5. All groups will remain on the Staff List but will not be included in the calculation of the increment pool
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| --- | --- |
| **Row Labels** | **Count of Emplid** |
| Libr 1 | 33 |
| Libr 2 | 21 |
| Libr 3 | 4 |
| **Grand Total** | **58** |

**The Grand Total is the maximum headcount for the LIB increment pool**  |
| **Step 3: Data Cleanse – APO at Ceiling** |
|  1. | **LIB at Ceiling*** Review the salary scales for the LIB by Rank and assign a Salary Maximum on the Headcount Summary Tab
* Click Staff List Final tab of the excel spreadsheet
* Click the Filter option on
* Filter by Rank and Step on Grade - uncheck all Grades under the grade maximum for each Rank
* Librarian 1 – Step 31
* Librarian 2 – Step 37
* Librarian 3 – Step 37
* Copy all employees at Ceiling to the At Ceiling Tab

**All LIBs at ceiling are NOT eligible for an increment.** * These staff members remain on the Staff List for review but a 2.4 increment will NOT be attributed in the pool
 |
| **Step 5:** **Data Cleanse – Childbirth/Parental Leave & Disability Leave** |
|  | **Identify all staff members who were on Childbirth or Parental Leave** * Data cleanse - Staff members on Childbirth or Parental Leave - flag those that have 0 C (On Leave)
 |
|  | **Identify all staff members who are on Partial or Full Disability Leave/Medical Leave*** Data cleanse - Staff members on full or partial disability leave - **Not included** in the increment pool after first year of disability - Moved to Disability section of template
 |
| **Step 6: New Hires April 1st to July 1st**  |
|  | **New Hires July 1st to October 1st*** Manually add any new starts, not captured when the report was generated, for the above dates in the Staff List and include in the Increment Pool. These staff members are eligible to receive a full merit increment
 |
|  | **New Hires October 2nd to June 1st** * New starts within these dates are **not included** in the increment pool, but manually add to the Staff List. These staff members are eligible for a pro-rated merit increment
 |
|  | **New Hires June 2nd to June 30th*** Not normally eligible for an increment. Do not include on the Staff List or increment pool calculation
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| **Step 7:** **Retirements and Resignations** |
|  1. | **Retirements*** If a retirement is received after the report is generated, the Staff List and Increment Pool should be amended accordingly
 |
| 2. | **Resignations*** All resignations will be removed from the Staff List and NOT included in the calculation of the Increment Pool
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| **Step 8: Review Checklist** |
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| Retirements | Adjusted base on terms of retirement agreement |
| Resignations | Adjust increment pool for all confirmed resignations |
| New Hires | Confirm all new hires between July 1st to October 1st are included on the Staff List and the Increment Pool calculation. Manually add to the Staff List if unknown at the time of report generation. |
| LIB at ceiling | Review data for LIBs at ceiling. Do NOT include in the Increment Pool calculation. |
| Staff Members on Leave | Adjust Staff List for those on Childbirth/Parental Leave 0 C (on Leave)  |
| Staff Members on Disability/Med Leave | Adjust Staff List for those on partial or full disability |
| Secondment | Identify any staff member on Secondment and refer to the Secondment Agreement for assessment directive |

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| **Step 9: Submit Increment Pool Calculation to Employment Services for Review** |
|  | **Submit Increment Pool Calculation to Employment Services**

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| **Row Labels** | **Count of Emplid** | **# At Ceiling** |
| Libr 1 | 33 | 3 |
| Libr 2 | 21 | 7 |
| Libr 3 | 4 | 1 |
| **Grand Total** | **58** | **11** |
|   |   |   |
| Remove | Retirements |   |
| Remove  | Resignations |   |
| Remove  | Disability |   |
| Remove  | Leaves |   |
| Remove  | At Ceiling |   |
| **Total** |  | **11** |
|   |   |   |
| **Pool Calculation** | **58 - 11 = 47** | **47 X 2.4 = 112.8** |

**Sample Email** Include the above information in the email to Employment Services with all explanations and comments regarding the pool calculation.Attach the excel spreadsheet to the email to Employment Services. |
| **Step 10:** **Prepare Staff List Increment Pool for Senior Administrator** |
| 1.2.3.4. | **Prepare Increment Pool Staff List**Once all the data has been reviewed and sorted:* Highlight all rows starting at Empl ID column F
* Copy and paste into the template from Employment Services
* Update Header of template with your Faculty/Department name.
* Ensure the template format is continued to the bottom of your staff list.
* Prepare email summary and attach the spreadsheet for Employment Services review.

**End of Procedure.** |