

From: [Silverman, Celestine](#)
To: [SRBA-CENTRALADMIN-L@LISTS.UPENN.EDU](#); [SRBA-SCHOOLCENTER-L@LISTS.UPENN.EDU](#)
Subject: Important Information Regarding FY25 Merit
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The following correspondence is being sent on behalf of Amy Collins, Associate Vice Provost:

Colleagues –

On behalf of the Division of Human Resources, the Office of the Vice Provost for Faculty, the Provost Office, and Workday Operations, we would like to provide important information as we prepare for the FY25 merit process.

Reclassifications and Salary Adjustments Timing

April 1, 2024 is the deadline for submitting reclassification and salary adjustment requests to core Compensation, including all required documentation. Requests received by core Compensation after April 1 will be evaluated and effective in FY25.

Some areas may have earlier submission deadlines, such as the Perelman School of Medicine (March 1) or centers reporting to the Provost (February 1).

Note, FY24 reclassifications and salary adjustments must have an effective date of no later than May 1, 2024.

Promotion Timing

Merit increases are not combined with salary increases resulting from promotions or reclassifications/salary adjustments. Merit eligible employees (staff and academic workers) being promoted/reclassified effective July 1st or later receive their **merit increase first** and then their **promotion/reclassification second**. *Promotions effective July 1st or later must be initiated and completed in Workday **after July 1st** but prior to the close of monthly payroll for which the promotion is effective.* If a promotion effective July 1st or later is initiated in Workday before the merit increase submission, it will be overridden by the merit process and will need to be re-initiated in Workday after July 1st.

For academic workers, promotion cases can be entered into Interfolio RPT and reviewed at any PSC(S) meeting prior to the effective date. However, Workday guidelines for promotions must be followed as outlined above.

Merit Plan Dates with Promotions (not clicking the x once)

If a staff or academic worker is moving from one merit-eligible job to another merit-eligible job, and already has a merit plan on their Workday compensation record, the initiator of the staffing transaction must **ensure that the merit plan remains with the original effective date**. Instructions on how to revert back to the original merit plan effective date on change job processes can be found [here](#).

Importance of Running Merit Audit Reports Prior to Merit Launch

Schools and centers are responsible for ensuring the accuracy of compensation records for their eligible staff and academic workers **before the launch** of the merit increase program. Therefore, in order to effectively prepare for the launch of merit later this year, schools and centers must **use the following merit audit reports early and often** to ensure that all merit eligible employees have active merit plans. Merit eligibility audit reports can be accessed within the Compensation Review dashboard, or by typing the report names below into the Workday search bar. The audit reports allow for streamlined identification of records that need correction or review **prior to merit launching**.

- **Merit Eligibility Audit for Staff and Academic Workers** – This report provides an analysis of merit eligibility for Staff and Academic Workers. Descriptive flags are included in the results to highlight potential issues that require review, which may impact eligibility or inclusion in the merit process in Workday. Utilize the descriptions on the following columns: *Eligibility Status/Description*, *Ineligible for Merit Reason*, and *Investigation Needed Reason* for the explanation of the investigation.
- **Merit Eligibility Audit - Employees with Mismatched Merit Plans that Require Removal** - This report displays employees with mismatched merit plan types. For example: An Academic worker has a Staff Merit plan assigned. In this case, that plan is not appropriate and should be removed and replaced with an Academic Merit Plan via a compensation change. Employees displayed in this report should have the merit plan removed via a compensation change. The removal must have an effective date before March 1 of the current year to be excluded from the merit process.

Thank you in advance for your cooperation and attention to this.

Amy Collins

Associate Vice Provost

Finance and Operations

Email: acoll@upenn.edu

Phone: 215-573-6912

236 S. 34th Street, 2nd Floor (Duhring Wing)

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