This form outlines the recommended merit calibration process and identifies the possible participants who should be involved in the process. Feel free to mark an “X” in the columns that apply to your organization. It is recommended that all school/division/department organization leaders and managers/supervisors view the UCI Merit Criteria and Merit Calibrationvideos online available on the Human Resources Merit Program website ([hr.uci.edu/partnership/merit](http://hr.uci.edu/partnership/merit)) for more information and guidance regarding merit calibration.

| **Step** | **Description** | **Leader /****Designee** | **Manager of Managers** | **Manager /****Supervisor** | **HR Rep** | **Employee** |
| --- | --- | --- | --- | --- | --- | --- |
| 1 | School/Division/Department Leader:* Communicates [UCI Merit Criteria](http://www.hr.uci.edu/partnership/merit/) to eligible employees
* Identifies and communicates to school/division/department
	+ Who will participate in merit level calibration process
	+ Who will participate in merit increase calibration process
	+ If there will be sub-merit increase guidelines within each merit level (e.g., 3 percentage levels in On Target merit level)
* Ensures managers/supervisors are trained on how to use the UCI Merit Criteria and Rating Guides to determine merit levels, and that they are reviewing the criteria and rating guide with each employee and answering questions.
 |  |  |  |  |  |
| 2 | Manager/Supervisor uses the [UCI Merit Criteria](http://www.hr.uci.edu/partnership/merit) to assess each employee’s performance during merit period of April 1 through March 31. They will use the information contained in the performance check-ins during the merit period to provide examples to support the merit level recommendation.* Manager/Supervisor will enter merit level recommendations on the **Merit Level Task** via ACHIEVEonline and submit by their specified deadline
 |  |  |  |  |  |
| 3 | Calibration participants identified in Step 1 prepare for calibration meeting* Review merit levels submitted via ACHIEVEonline (report can be generated from ACHEIVEonline)
* Managers of managers/supervisors should clarify with their employee supervisors any questions about their employee merit level recommendations and support information. This will ensure that the manager of managers can discuss all of their direct and indirect employees’ merit levels in the meeting.
 |  |  |  |  |  |
| 4 | Leader schedules and holds **Merit Level Calibration Meeting** with participants identified in Step 1* See [How to Calibrate Merit video](http://hr.uci.edu/partnership/merit/) for recommended steps and activities
* Leader clarifies meeting process and decision making
	+ Reminds group that calibrated merit levels will be used to determine merit percentages
	+ Reminds participants about confidentiality of all calibration discussion and documents
	+ Reminds participants that they should not share any information with employees until they receive HR approval
 |  |  |  |  |  |
| 5 | HR releases **Merit Distribution Task** via ACHIEVEonlineto department administrators (final merit budget allocation confirmed) |  |  |  |  |  |
| 6 | Leader schedules and holds **Merit Distribution Calibration Meeting** with the participants identified in Step 1, ensuring meaningful differentiation for top performers |  |  |  |  |  |
| 7 | School/Division/Departments send to HR any merit exceptions to guidelines. Must provide written justification in a Word document. |  |  |  |  |  |
| 8 | HR reviews exceptions and provides feedback to departments |  |  |  |  |  |
| 9 | Department Administrator obtains approval from leader and submits **Merit Distribution Task** via ACHIEVEonline for final HR approval and download to payroll system |  |  |  |  |  |
| 10 | HR notifies school/division/department leader or designee that final merits have been reviewed, notification letters can be generated, and merit notification meetings can be held* School/Division/Department HR representative will determine who will create the Employee Merit Notification Letters
* Support information for recommended merit levels that were changed in calibration should be shared with manager/supervisor to use for Merit Notification Discussions
 |  |  |  |  |  |
| 11 | Manager/Supervisor conducts Merit Notification Discussions using Merit Notification Letter, Merit Criteria Guide, and merit level support information used in calibration to determine level. See [Communicating Merit Levels video](http://hr.uci.edu/partnership/merit/) for helpful information and guidance. |  |  |  |  |  |