



Compensation Workbench (CWB) Training

Spring 2010

Introductions

**Agenda
Course
Objectives**

**Ground
Rules
&
Parking
Lot**

Lesson 1:

Introduction

Lesson 2:

Pay Pool Process Review and CWB Overview

Lesson 3:

DCPDS CWB Extract and CWB Import

Lesson 4:

Setting the Pay Pool Budget and Administrator Options

Lesson 5:

Supporting Salary Increase Decisions

Lesson 6:

Supporting Bonus Decisions

Lesson 7:

Completing the Process

Certifying Results / Employee Notices / Exporting Data



Activities

Course Objectives

- After this course you should:
 - Be able to explain how the CWB supports the pay pool process;
 - Better understand the DCIPS salary increase and bonus algorithms;
 - Be able to use the CWB to support pay pool panel meetings, and specifically:
 - *Extract CWB data from DCPDS and import it into the CWB*
 - *Setup a pay pool budget and set administrator options*
 - *Support your pay pool during salary increase decisions*
 - *Support your pay pool during bonus decisions*
 - *Certify the pay pool results*
 - *Generate employee notices*
 - *Export your pay pool data*

MORE helpful to....

- Focus on understanding the mechanics of the CWB
- Focus on the understanding the basics concept of the salary increase and bonus algorithms
- Participate in activities and ask questions



LESS helpful to...

- Focus on questioning pay pool and compensation concepts
- Hold side conversations
- Lay low

Parking Lot



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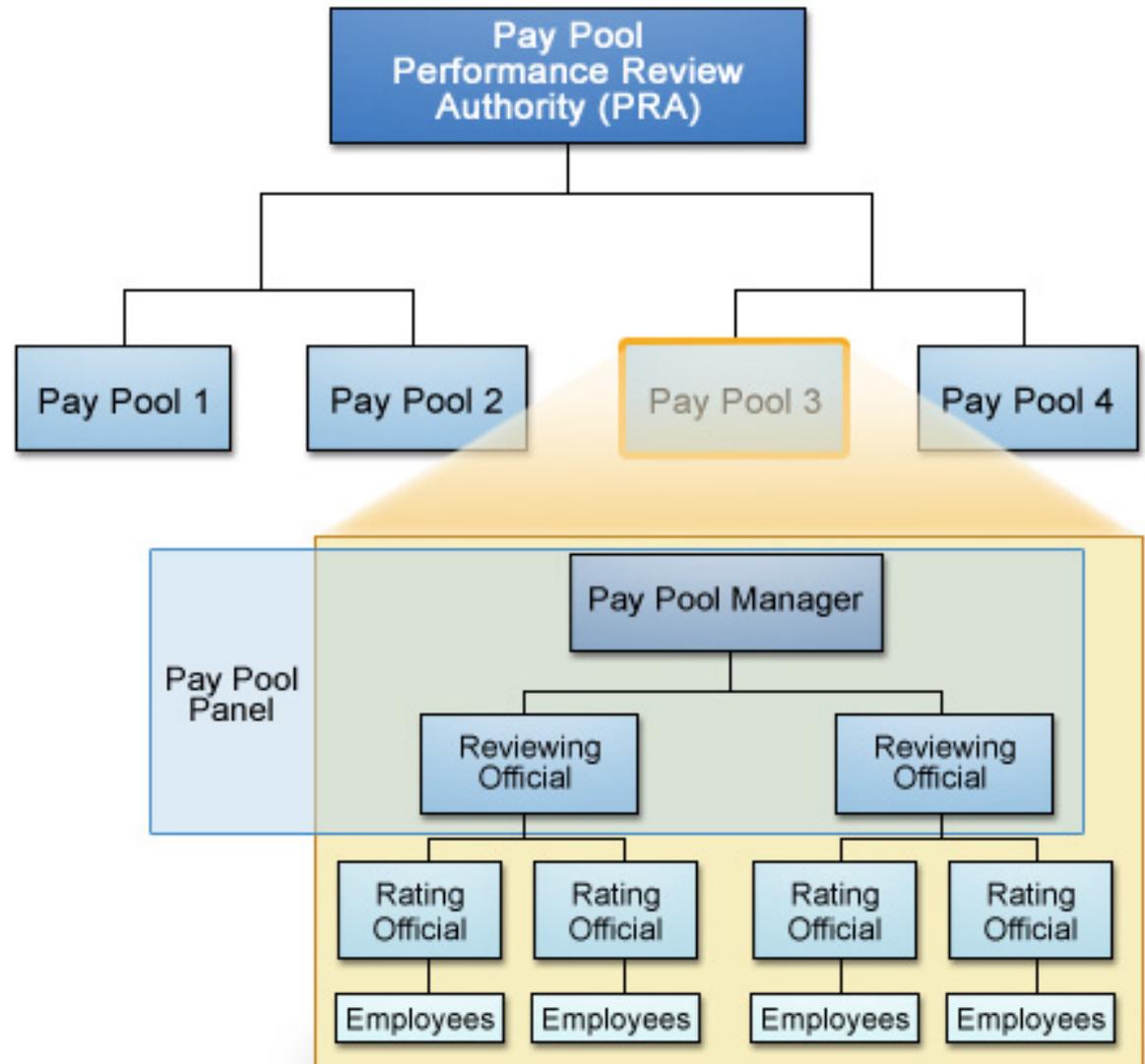
Lesson 7:
Completing the Process

Certifying Results / Employee Notices / Exporting Data / DCPDS Upload

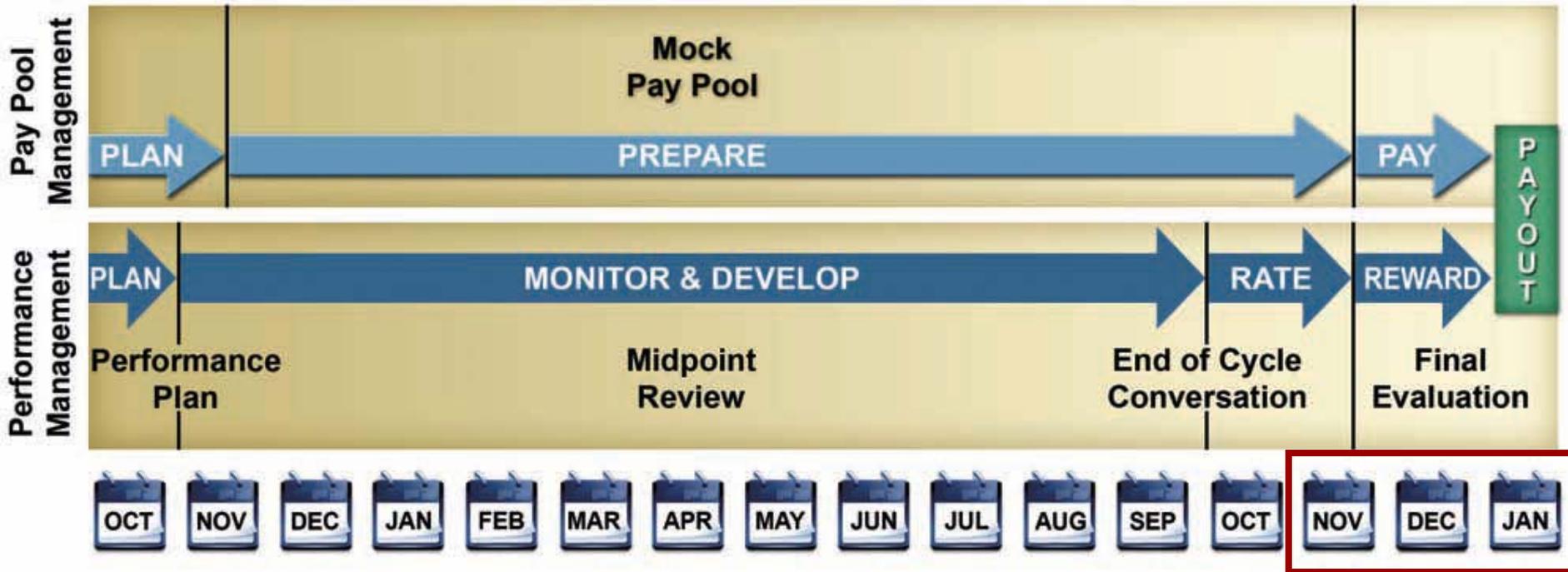


Activities

What is a Pay Pool?



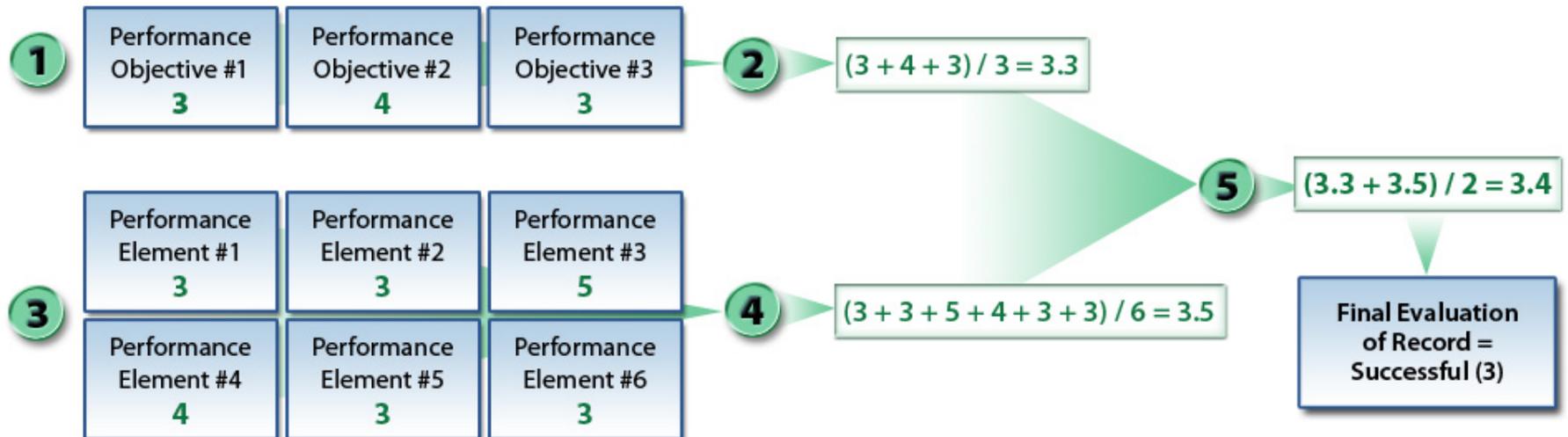
Pay Pool Timeline

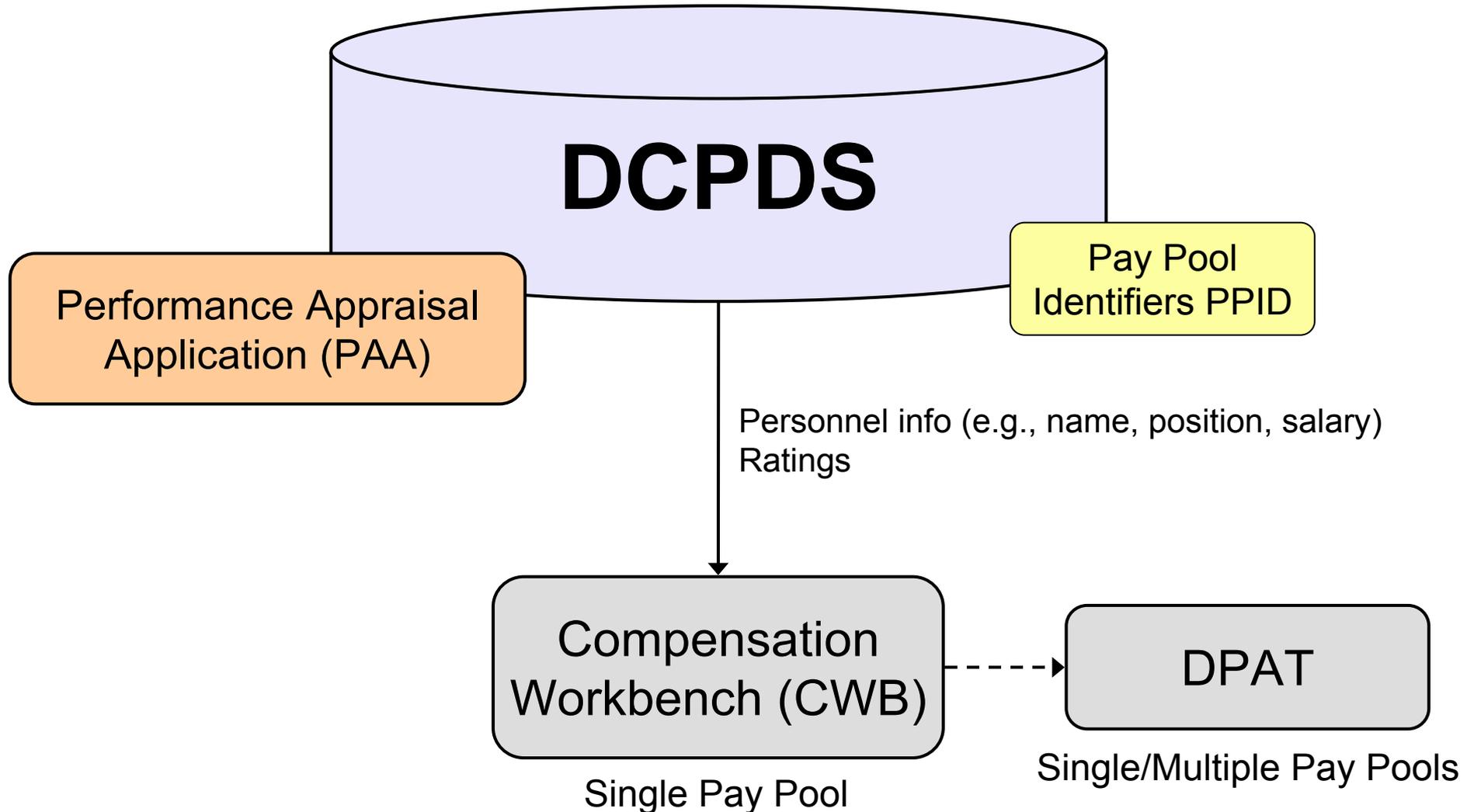


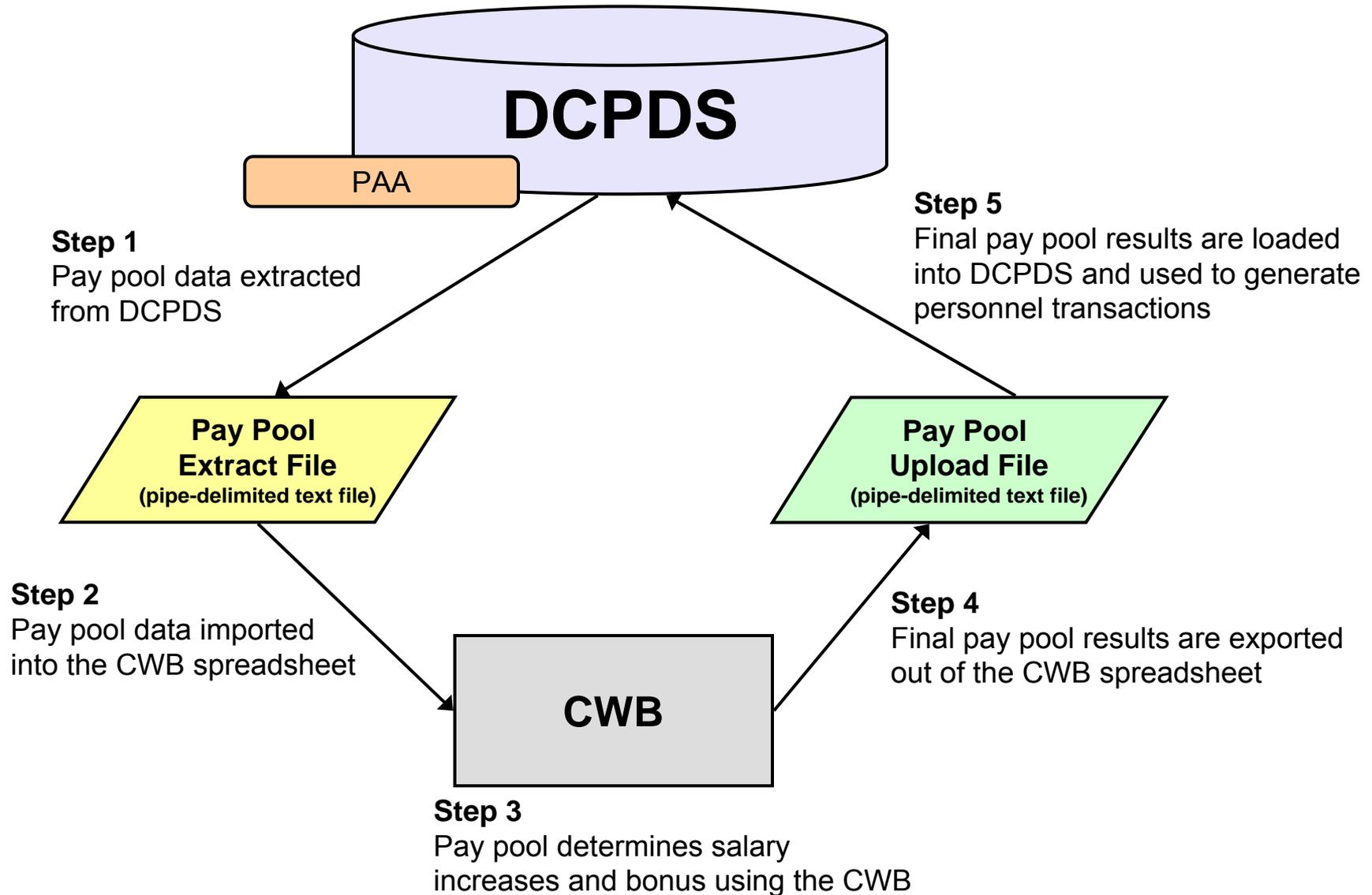
Question:

Can pay pools change ratings?

- ❑ NO -- ratings are finalized prior to the pay pool meeting
- ❑ 100% complete and approved appraisals, including ratings, are **critical** to the DCIPS pay pool process







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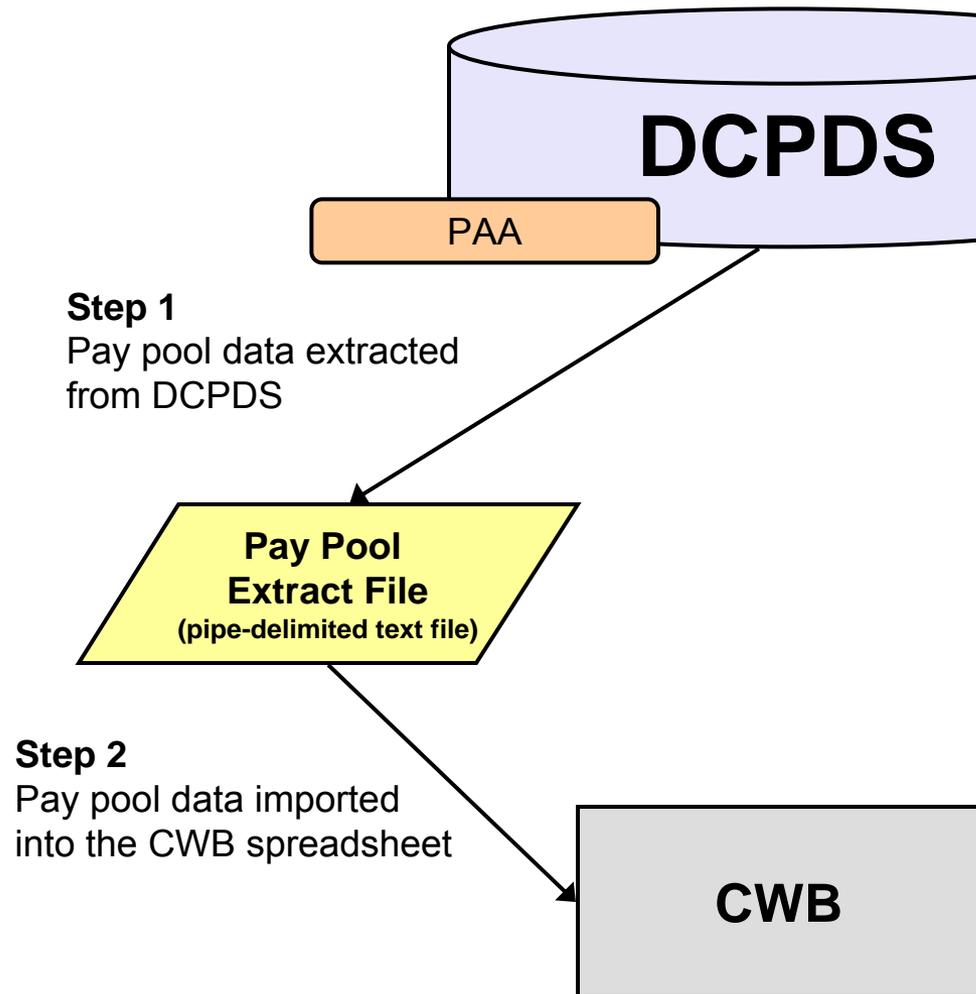
Lesson 6:
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Certifying Results / Employee Notices / Exporting Data



Activities

DCPDS CWB Extract

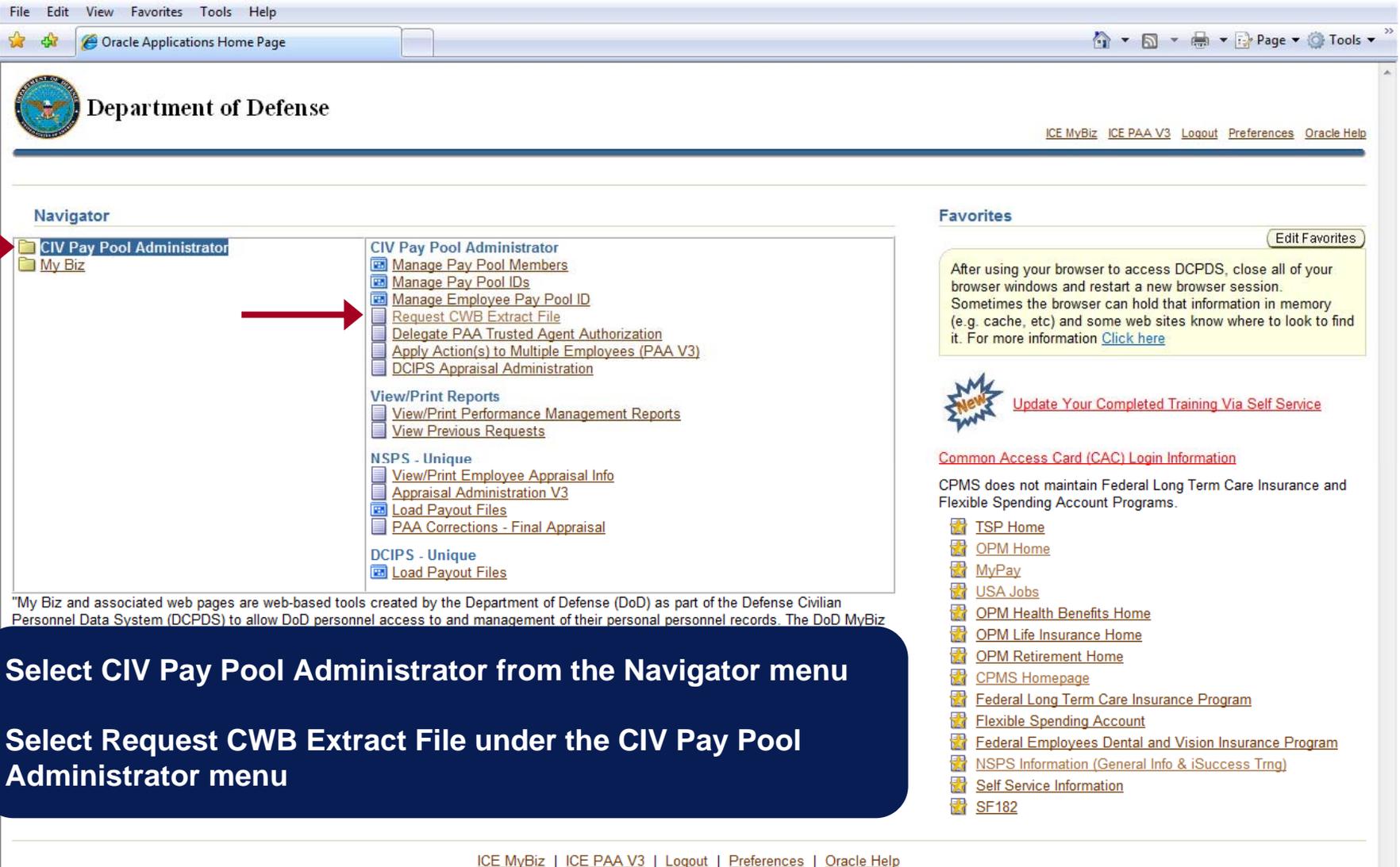


Pay pool administrators can download their pay pool data from DCPDS

Each employee in the pay pool must have the correct pay pool identifier

Extract file includes fields such as first and last name, base salary, pay band, organizational information, occupational series, performance ratings...

Request CWB Extract File



File Edit View Favorites Tools Help

Oracle Applications Home Page

Department of Defense

ICE MyBiz ICE PAA V3 Logout Preferences Oracle Help

Navigator

- CIV Pay Pool Administrator**
- My Biz

CIV Pay Pool Administrator

- Manage Pay Pool Members
- Manage Pay Pool IDs
- Manage Employee Pay Pool ID
- Request CWB Extract File
- Delegate PAA Trusted Agent Authorization
- Apply Action(s) to Multiple Employees (PAA V3)
- DCIPS Appraisal Administration

View/Print Reports

- View/Print Performance Management Reports
- View Previous Requests

NSPS - Unique

- View/Print Employee Appraisal Info
- Appraisal Administration V3
- Load Payout Files
- PAA Corrections - Final Appraisal

DCIPS - Unique

- Load Payout Files

Favorites Edit Favorites

After using your browser to access DCPDS, close all of your browser windows and restart a new browser session. Sometimes the browser can hold that information in memory (e.g. cache, etc) and some web sites know where to look to find it. For more information [Click here](#)

New [Update Your Completed Training Via Self Service](#)

[Common Access Card \(CAC\) Login Information](#)

CPMS does not maintain Federal Long Term Care Insurance and Flexible Spending Account Programs.

- TSP Home
- OPM Home
- MyPay
- USA Jobs
- OPM Health Benefits Home
- OPM Life Insurance Home
- OPM Retirement Home
- CPMS Homepage
- Federal Long Term Care Insurance Program
- Flexible Spending Account
- Federal Employees Dental and Vision Insurance Program
- NSPS Information (General Info & iSuccess Trng)
- Self Service Information
- SF182

ICE MyBiz | ICE PAA V3 | Logout | Preferences | Oracle Help

Select CIV Pay Pool Administrator from the Navigator menu

Select Request CWB Extract File under the CIV Pay Pool Administrator menu

Enter Pay Pool Information

File Edit View Favorites Tools Help

CWB Download Payout Data

Department of Defense

ICE MyBiz ICE PAA V3 Home Logout Preferences

CWB Download Payout Data

* Indicates required field

Cancel **Submit Request**

* Process Name TIP Recommend Name be Unique.

* Mock Pay Pool Data

* PP Id Segment1 

* Pay Pool Cycle Closeout Date

ICE MyBiz | ICE PAA V3 | Home | Logout | Preferences

Process Name: Enter a unique process name of your choice

Mock Pay Pool Data: Select Yes for Mocks, No for real pay pools

PP Id Segment 1: Enter the pay pool identifier

Pay Pool Cycle Closeout Date: Select 30-Sep-XXXX

Wait for DCPDS to Generate the File

File Edit View Favorites Tools Help

Requests

 **Performance Appraisal Application (PAA)**
Version 3.0

[ICE MyBiz](#) [ICE PAA V3](#) [Home](#) [Logout](#) [Preferences](#) [Oracle Help](#)

Requests

Refresh Button: Select to update the Phase of the process execution
 Details Icon: Provides a summary that includes, but not limited to name of report, status, phase, request ID and parameters
 Output Icon: Review report information

To exit this page, select the 'Home' link or select 'Logout' to exit the system.

TIP: Click "Refresh" to update the phase of the process execution

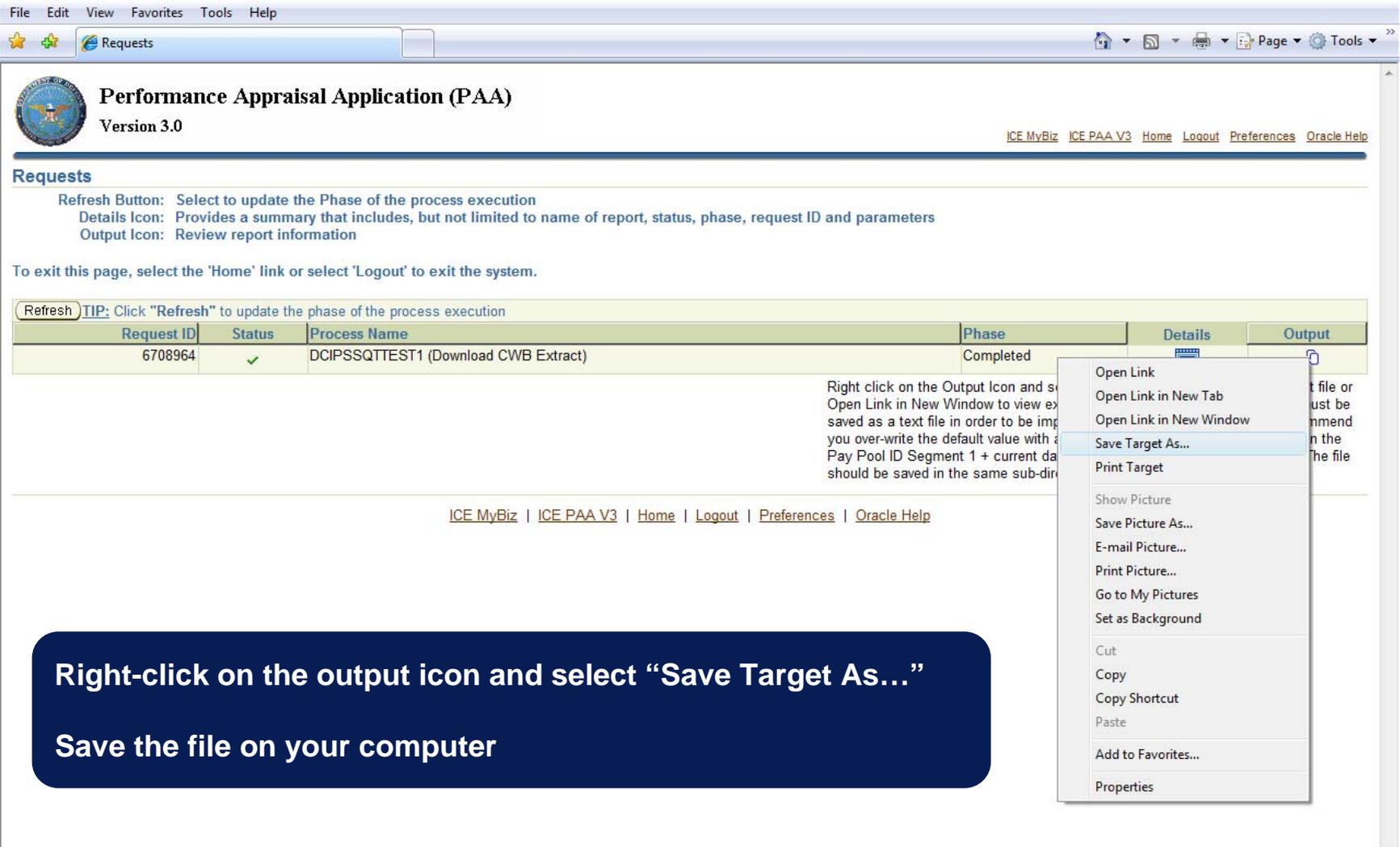
Request ID	Status	Process Name	Phase	Details	Output
6708964	✓	DCIPSSQTTEST1 (Download CWB Extract)	Completed		

Right click on the Output Icon and select Save Target As to download extract file or Open Link in New Window to view extract file prior to downloading. The file must be saved as a text file in order to be imported into the CWB spreadsheet. Recommend you over-write the default value with a naming convention such as: the value in the Pay Pool ID Segment 1 + current date + the word "Extract", Click on Save. The file should be saved in the same sub-directory as the CWB spreadsheet.

[ICE MyBiz](#) | [ICE PAA V3](#) | [Home](#) | [Logout](#) | [Preferences](#) | [Oracle Help](#)

Select the "Refresh" button until an icon appears under Output

Save the Extract File



The screenshot shows a web browser window displaying the Performance Appraisal Application (PAA) Version 3.0. The page includes a navigation menu with links for ICE MyBiz, ICE PAA V3, Home, Logout, Preferences, and Oracle Help. Below the navigation is a 'Requests' section with instructions for using the Refresh, Details, and Output icons. A table lists a request with ID 6708964, status 'Completed', and process name 'DCIPSSQTEST1 (Download CWB Extract)'. A right-click context menu is open over the 'Output' icon, with 'Save Target As...' selected. A dark blue callout box at the bottom left contains the text: 'Right-click on the output icon and select “Save Target As...” Save the file on your computer'.

Performance Appraisal Application (PAA)
Version 3.0

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Requests

Refresh Button: Select to update the Phase of the process execution
 Details Icon: Provides a summary that includes, but not limited to name of report, status, phase, request ID and parameters
 Output Icon: Review report information

To exit this page, select the 'Home' link or select 'Logout' to exit the system.

Refresh **TIP:** Click "Refresh" to update the phase of the process execution

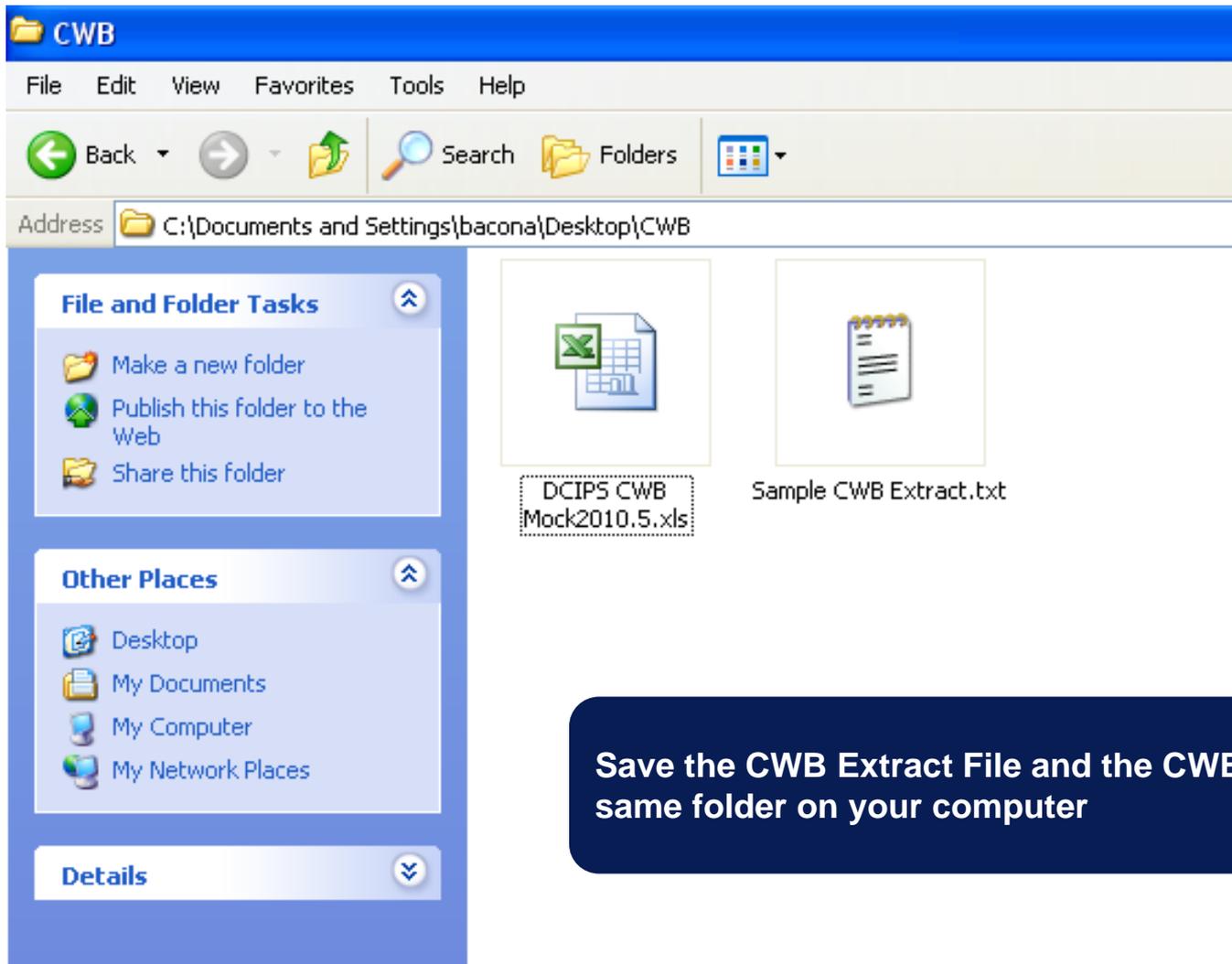
Request ID	Status	Process Name	Phase	Details	Output
6708964	✓	DCIPSSQTEST1 (Download CWB Extract)	Completed		

Right click on the Output Icon and select "Save Target As..." to save the file to your computer.

[ICE MyBiz](#) | [ICE PAA V3](#) | [Home](#) | [Logout](#) | [Preferences](#) | [Oracle Help](#)

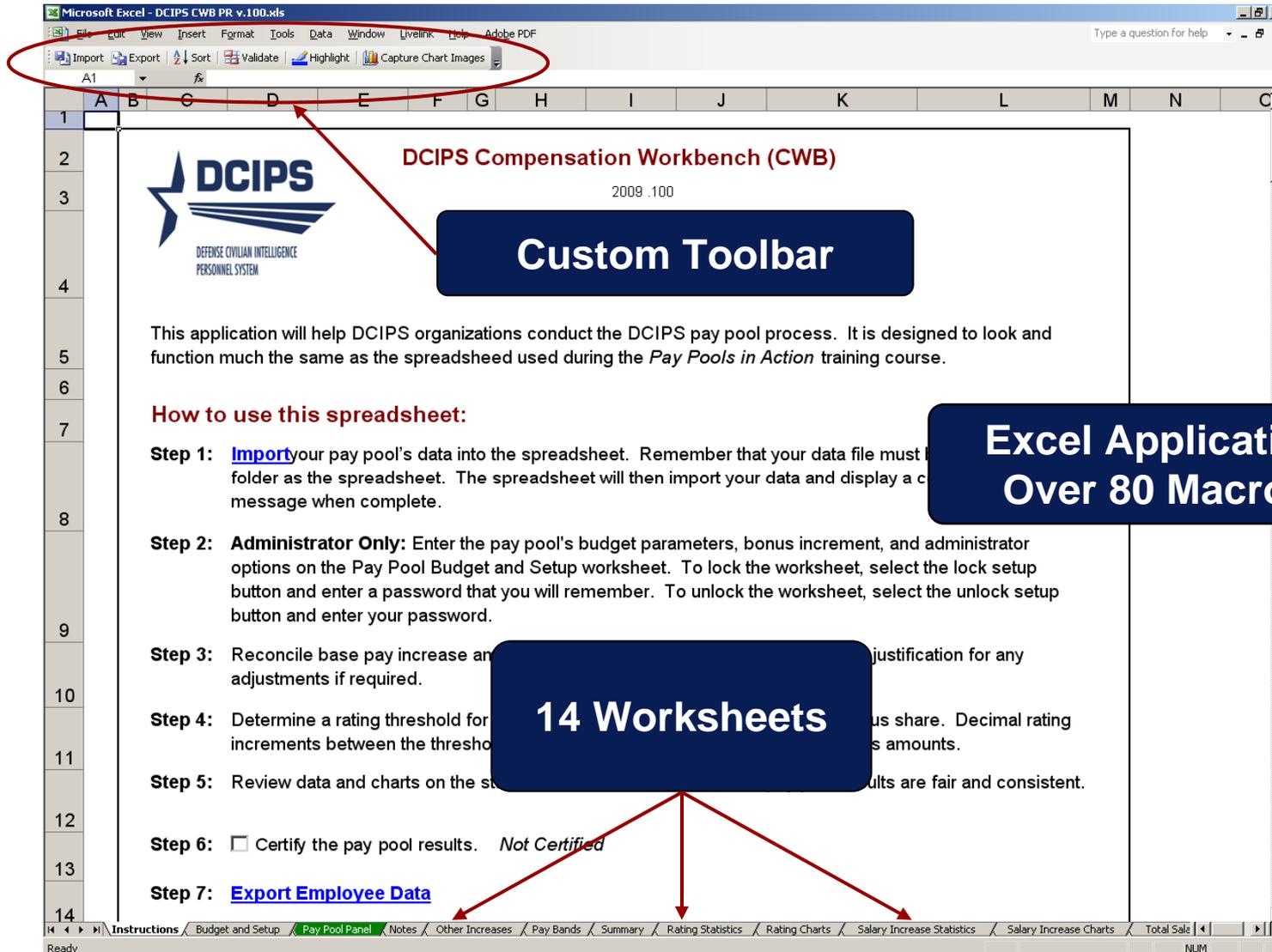
Right-click on the output icon and select “Save Target As...”
Save the file on your computer

CWB Extract File and CWB



Save the CWB Extract File and the CWB spreadsheet in the same folder on your computer

Navigating the CWB



Microsoft Excel - DCIPS CWB PR v.100.xls

File Edit View Insert Format Tools Data Window LiveLink Help Adobe PDF

Type a question for help

Import Export Sort Validate Highlight Capture Chart Images

A1 fx

A B C D E F G H I J K L M N C

1

2

3

4

5

6

7

8

9

10

11

12

13

14

DCIPS
DEFENSE CIVILIAN INTELLIGENCE
PERSONNEL SYSTEM

DCIPS Compensation Workbench (CWB)

2009.100

Custom Toolbar

This application will help DCIPS organizations conduct the DCIPS pay pool process. It is designed to look and function much the same as the spreadsheet used during the *Pay Pools in Action* training course.

How to use this spreadsheet:

Step 1: [Import](#) your pay pool's data into the spreadsheet. Remember that your data file must be in the same folder as the spreadsheet. The spreadsheet will then import your data and display a completion message when complete.

Step 2: Administrator Only: Enter the pay pool's budget parameters, bonus increment, and administrator options on the Pay Pool Budget and Setup worksheet. To lock the worksheet, select the lock setup button and enter a password that you will remember. To unlock the worksheet, select the unlock setup button and enter your password.

Step 3: Reconcile base pay increase and adjustments if required. Justification for any adjustments if required.

Step 4: Determine a rating threshold for increments between the threshold amounts. Decimal rating increments between the threshold amounts.

Step 5: Review data and charts on the spreadsheet. Results are fair and consistent.

Step 6: Certify the pay pool results. *Not Certified*

Step 7: [Export Employee Data](#)

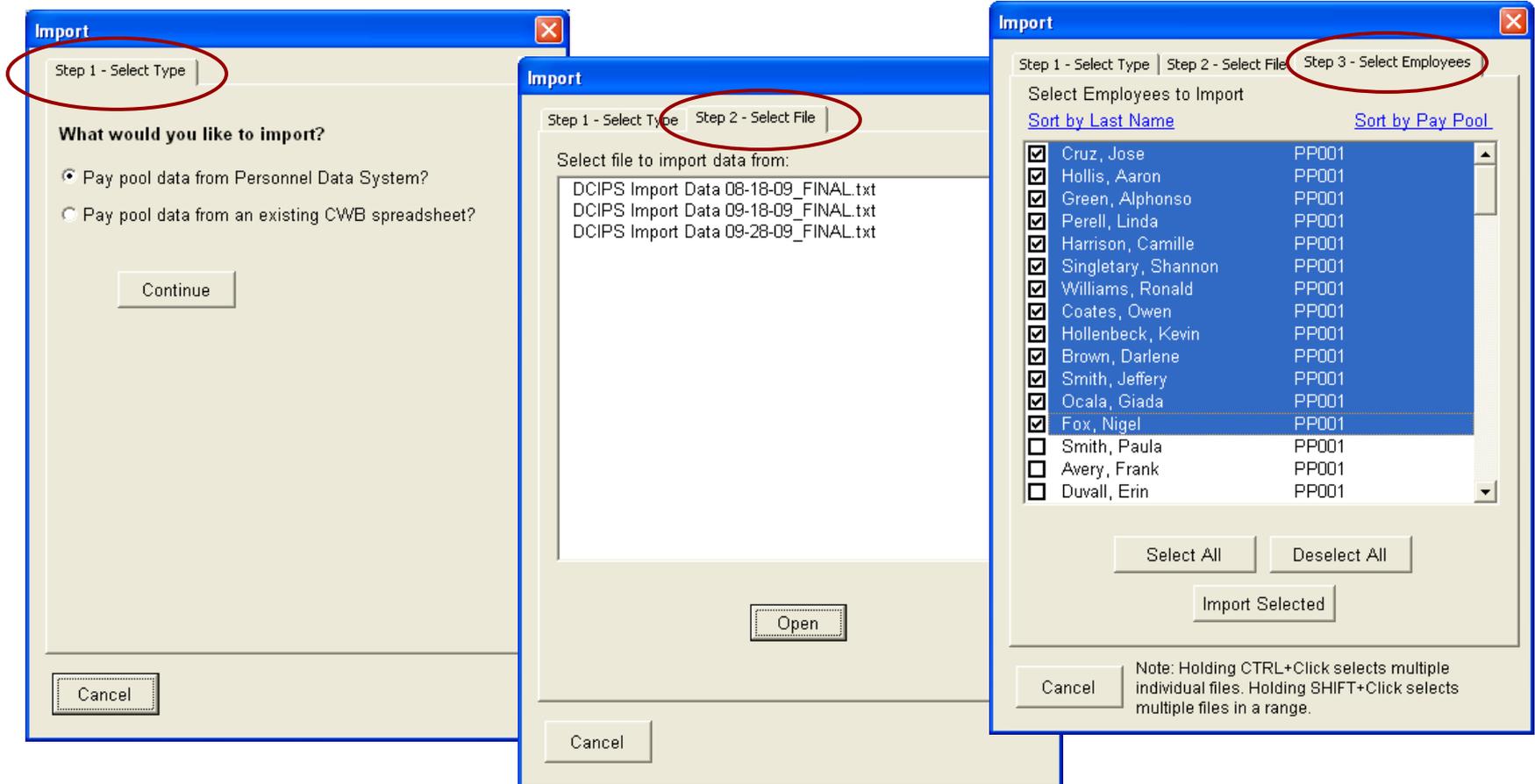
14 Worksheets

Excel Application Over 80 Macros

Instructions Budget and Setup Pay Pool Panel Notes Other Increases Pay Bands Summary Rating Statistics Rating Charts Salary Increase Statistics Salary Increase Charts Total Sale NUM

Importing Data

- ❑ Data file must be in same folder as the CWB spreadsheet
- ❑ Select the **Import** button from the Custom Toolbar or the **Import** link on the Instructions Worksheet and follow the three-step process below



The image displays three sequential screenshots of the DCIPS Import dialog box, illustrating the three-step process:

- Step 1 - Select Type:** The dialog asks "What would you like to import?" with two radio button options: "Pay pool data from Personnel Data System?" (selected) and "Pay pool data from an existing CWB spreadsheet?". A "Continue" button is visible.
- Step 2 - Select File:** The dialog asks "Select file to import data from:" and lists three files: "DCIPS Import Data 08-18-09_FINAL.txt", "DCIPS Import Data 09-18-09_FINAL.txt", and "DCIPS Import Data 09-28-09_FINAL.txt". An "Open" button is visible.
- Step 3 - Select Employees:** The dialog asks "Select Employees to Import" and provides two sorting options: "Sort by Last Name" (selected) and "Sort by Pay Pool". A list of employees is shown with checkboxes and their corresponding pay pool codes (PP001). The "Fox, Nigel" entry is highlighted. "Select All", "Deselect All", and "Import Selected" buttons are visible. A note at the bottom states: "Note: Holding CTRL+Click selects multiple individual files. Holding SHIFT+Click selects multiple files in a range."

Hands-On Exercises



Activities

10 Minutes

Understand How to Make Sure Macros are Enabled

Excel 2003

- Open your CWB spreadsheet
- If you are prompted to enable or disable macros, select Enable
- If you are not prompted, do the following:
 - From Tools menu, select Macros then Security
 - Select “Medium”
 - Select “OK”
- Close Excel and re-open the CWB
- Click the “Enable Macros” button

Excel 2007

- Open your CWB spreadsheet
- Look for the message under the top menu that says “Security Warning: Some active content has been disabled”
- Select the “Options” button displayed to right of the message
- Select “Enable this content”
- Select “OK”

Import a Pay Pool Data File

- Make sure your Import text file is saved in the same folder as your CWB file
- From the Instruction Worksheet, click on the underlined “Import” link
- Select text file and click “Open”
- Select all records and click on “Import Selected”

How do you quickly check to make sure you imported the correct number of employees? Why is it important to import the correct employees?

Exercise Review

Enabling macros

- How can you tell if macros are NOT enabled?

Importing data

- How do you quickly check to make sure you imported the correct number of employees?
- Why is it important to import the correct number of employees?

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Activities

Budget and Setup

❑ Main Salary/Bonus funding % are of total base salary

(rated employees only)

❑ Organizational Withhold/Reserve are funds removed from the pay pool budget

- Entered as a dollar amount or percentage of main budget

❑ Additional funding are funds added to the budget

- Entered as a dollar amount or percentage of main budget

❑ Adjustment funding are funds reserved for adjustments

- Entered as a dollar amount or percentage of **Total** budget

Pay Pool Population and Salary Information

	Population	Sum of Salary
Entire PayPool	100	\$8,383,325
Rated	98	\$8,243,185
Rated and Included in Salary Calculation	98	\$8,243,185
Rated and Included in Bonus Calculation	98	\$8,243,185

Pay Pool Salary Increase Budget

	%	\$
Salary Increase Funding	2.30%	\$189,593
- Organization Withhold/Reserve (optional)	0.00%	\$0
+ Additional Salary Increase Funding (optional)	0.00%	\$0
Total Salary Increase Budget	2.30%	\$189,593
- Adjustment Funding (optional)	1.05%	\$2,000
Salary Increase Funding Available to Algorithm	2.28%	\$187,593

Pay Pool Bonus Budget

	%	\$
Bonus Budget Percentage	1.80%	\$148,377
- Organization Withhold/Reserve (optional)	0.00%	\$0
+ Additional Bonus Funding (optional)	0.00%	\$0
Total Bonus Budget	1.80%	\$148,377
- Adjustment Funding (optional)	0.00%	\$0
Bonus Funding Available to Algorithm	1.80%	\$148,377

Eligibility Controls

Columns F, G, H and I in Pay Pool Panel Worksheet

Microsoft Excel - DCIPS CWB PR v.100.xls

File Edit View Insert Format Tools Data Window Livelink Help Adobe PDF

Import Export Hide Unhide Unhide All Hide Unhide Unhide All Change View Clear All Filters Sort Validate Clear Circles Delete Row Highlight Capture Chart

F18 No

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	Go To:												
2	Budget												
3	Ratings												
4	Salary Increase												
5	Bonus												
6													
7													
8	Employees:		100										
9	Visible Employees:		100										
10													
11	Last Name	First Name	Employee ID	Evaluation ID	Pay Pool ID	Include in Salary Incr Fund Calculations?	Include in Bonus Fund Calculations?	Salary Increase Eligible?	Bonus Eligible?	Org ID 1	Org ID 2	Wildcard 1	Rating Cycle End Date
12													
13	Gibrar	Calek	A18660	18661	PP001	Yes	Yes	Yes	Yes	OFC/AAA	Division 1		9/30/2009
14	Wright	Marcus	A23970	23971	PP001	Yes	Yes	Yes	Yes	OFC/AAA	Division 1		9/30/2009
15	Burns	Jacob	10695	12828	PP001	Yes	Yes	Yes	Yes	OFC/BBB	Division 1		9/30/2009
16	York	Athena	12288	12853	PP001	Yes	Yes	Yes	Yes	OFC/CCC	Division 2		9/30/2009
17	Bearly	Janet	18129	12861	PP001	Yes	Yes	Yes	Yes	OFC/CCC	Division 2		9/30/2009
18	Jacobson	Mike	19191	12079	PP001	No	Yes	Yes	Yes	OFC/CCC	Division 2		9/30/2009
19	Anderton	Michael	22908	12880	PP001	Yes	Yes	Yes	Yes	OFC/CCC	Division 2		9/30/2009
20	Wilkerson	Lisa	23439	12881	PP001	Yes	Yes	Yes	Yes	OFC/CCC	Division 2		9/30/2009
21	Legend	Jonathan	12819	12882	PP001	Yes	Yes	Yes	Yes	OFC/CCC	Division 2		9/30/2009
22	Casey	Jeff	13350	12883	PP001	Yes	Yes	Yes	Yes	OFC/CCC	Division 2		9/30/2009
23	Fain	Collin	13881	10696	PP001	Yes	Yes	No	No	OFC/AAA	Division 1		9/30/2009
24	Jensen	Herbert	14412	12289	PP001	Yes	Yes	Yes	Yes	OFC/AAA	Division 1		9/30/2009
25	Wolf	Doug	14943	18130	PP001	Yes	Yes	Yes	Yes	OFC/AAA	Division 1		9/30/2009
26	Morris	Todd	11226	19192	PP001	Yes	Yes	Yes	Yes	OFC/AAA	Division 1		9/30/2009
27	Cooper	Julia	9102	22909	PP001	Yes	Yes	Yes	Yes	OFC/AAA	Division 1		9/30/2009
28	Hughes	Wayne	9633	23440	PP001	Yes	Yes	Yes	Yes	OFC/AAA	Division 1		9/30/2009
29	Uster	Ryan	10164	12820	PP001	Yes	Yes	Yes	Yes	OFC/AAA	Division 1		9/30/2009
30	Lazoro	Martha	15474	18661	PP001	Yes	Yes	No	No	OFC/AAA	Division 1		9/30/2009
31	Enright	Bill	16005	23971	PP001	Yes	Yes	Yes	Yes	OFC/AAA	Division 1		9/30/2009
32	Morris	Edna	16536	10696	PP001	Yes	Yes	Yes	Yes	OFC/AAA	Division 1		9/30/2009
33	Arie	Josiah	17067	12289	PP001	Yes	Yes	Yes	Yes	OFC/AAA	Division 1		9/30/2009
34	Combs	Shawn	24501	18130	PP001	Yes	Yes	Yes	Yes	OFC/AAA	Division 1		9/30/2009
35	Simpson	Burton	22377	12829	PP001	Yes	Yes	Yes	Yes	OFC/BBB	Division 2		9/30/2009
36	Parsons	Ray	11757	12830	PP001	Yes	Yes	Yes	Yes	OFC/BBB	Division 2		9/30/2009
37	Hewitt	Sally	17598	12831	PP001	Yes	Yes	Yes	Yes	OFC/BBB	Division 2		9/30/2009
38	Kidd	Jason	26625	12832	PP001	Yes	Yes	Yes	Yes	OFC/BBB	Division 2		9/30/2009
39	White	Paul	25032	12833	PP001	Yes	Yes	Yes	Yes	OFC/BBB	Division 2		9/30/2009
40	Peake	Mark	26094	12834	PP001	Yes	Yes	Yes	Yes	OFC/BBB	Division 2		9/30/2009
41	Earmpr	Jewel	27156	12835	PP001	Yes	Yes	Yes	Yes	OFC/BBB	Division 2		9/30/2009

Instructions Budget and Setup Pay Pool Panel Notes Other Increases Pay Bands Summary Rating Statistics Rating

□ Bonus Setup

- Maximum bonus
- Share increment (used in the Bonus algorithm)

Bonus Setup

Maximum Bonus

\$25,000

Share Increment

10.00%

What is the share increment?

The DCIPS bonus algorithm gives the employee receiving the threshold rating 1 bonus share. Then each tenth of a rating higher receives X% more shares than the previous rating, where X = the share increment.

□ Floor Increase

- Set by DoD
- Update Floor button provides capability to update floor, pay bands, and LMS rates

Floor Increase

2011 Salary Increase Floor (Set by DoD) = 1.50%

Update Floor

- ❑ Administrator options set the user's ability to
 - Modify budget entries and payout eligibility parameters
 - Modify variable control points
 - Modify the bonus rating threshold
 - Print employee notices

- ❑ Options can be locked with password

Administrator Options

Allow edits to budget and payout eligibility in the Pay Pool Panel worksheet (columns F, G, H, and I)?	<input type="text" value="Yes"/>
Allow edits to the Variable Control Points in the Pay Pool Panel worksheet (column BC)?	<input type="text" value="Yes"/>
Allow printing of Employee Notices?	<input type="text" value="Yes"/>
Allow edits to the Rating Threshold in the Pay Pool Panel Worksheet (cell CT6)?	<input type="text" value="Yes"/>

Lock Budget and Setup

Allow changes to the Rating Information

Unlock Ratings

□ Unlock ratings

- Button to unlock ratings columns is located at bottom of Budget and Setup worksheet
- Password is “unlockratings”
- Ratings should only be changed due to administrative error or reconsideration
- Enter Evaluation of Record first to clear gray formatting
- Re-lock the rating columns when finished

Ratings						
Avg:	Avg:	Avg:	Avg:			
3.64	3.59	3.62	3.5			
Objective Rating	Element Rating	Overall Average Rating	Evaluation of Record	Rating Description	Wildcard 3	
3.0	2.8	2.9	3	Successful		
3.0	2.8	2.9	3	Successful		
3.0	2.8	2.9	3	Successful		
2.3	2.0	2.2	2	Min Successful		
2.0	2.0	2.0	2	Min Successful		
1.0	3.0	2.0	1	Unacceptable		

Ratings						
Avg:	Avg:	Avg:	Avg:			
3.61	3.55	3.58	3.5			
Objective Rating	Element Rating	Overall Average Rating	Evaluation of Record	Rating Description	Wildcard 3	
3.0	2.8	2.9	3	Successful		
3.0	2.8	2.9	3	Successful		
3.0	2.8	2.9	3	Successful		
2.3	2.0	2.2	2	Min Successful		
2.0	2.0	2.0	2	Min Successful		
1.0	3.0	2.0	1	Unacceptable		
			3	Successful		

Hands-On Exercises



Activities

10 – 15 Minutes

Set up your Pay Pool Budget

- Go to the Budget and Setup Worksheet

- Enter your pay pool's salary increase funding
 - Enter **2.25%** for Salary Increase Funding
 - Enter 5% for the Organizational Withhold
 - Enter \$5,000 for Additional Salary Increase Funding
 - Enter \$5,000 for Adjustment Funding

- Enter your pay pool's bonus funding
 - Enter **1.8%** for Bonus Funding
 - Do not enter any Organizational Withhold
 - Do not enter any Additional Salary Increase Funding
 - Do not enter any Adjustment Funding

How do the different budget items impact the funding available to the algorithm?

Set the Administrator Options

- Go to the Budget and Setup Worksheet
- Set the options to match below and **LOCK** your budget and setup worksheet

Administrator Options

Allow edits to budget and payout eligibility in the Pay Pool Panel worksheet (columns F, G, H, and I)?	<input type="button" value="No"/>
Allow edits to the Variable Control Points in the Pay Pool Panel worksheet (column BC)?	<input type="button" value="Yes"/>
Allow printing of Employee Notices?	<input type="button" value="No"/>
Allow edits to the Rating Threshold in the Pay Pool Panel Worksheet (cell CT6)?	<input type="button" value="Yes"/>

What happens when the first option (budget and payout eligibility) is set to No?

- Now **unlock** your setup before continuing...

Unlock Ratings

- Unlock the ratings columns by clicking the “Unlock Ratings” button on the Budget and Setup worksheet
- Enter the password: unlockratings
- Enter the following ratings for Colin Fain
 - Evaluation of Record: 4
 - Average Overall Rating: 4.0
 - Element Rating: 4.0
 - Objective Rating: 4.0
- Re-lock the rating columns

What happens to the formatting in Fain’s row when you enter in the Evaluation of Record?

Budget and setup

- How do the different budget items impact the funding available to the algorithm?

Administrator options

- What happens when the first option (budget and payout eligibility) is set to No?

Unlocking ratings

- What happens to the formatting in Fain's row when you enter in the Evaluation of Record?

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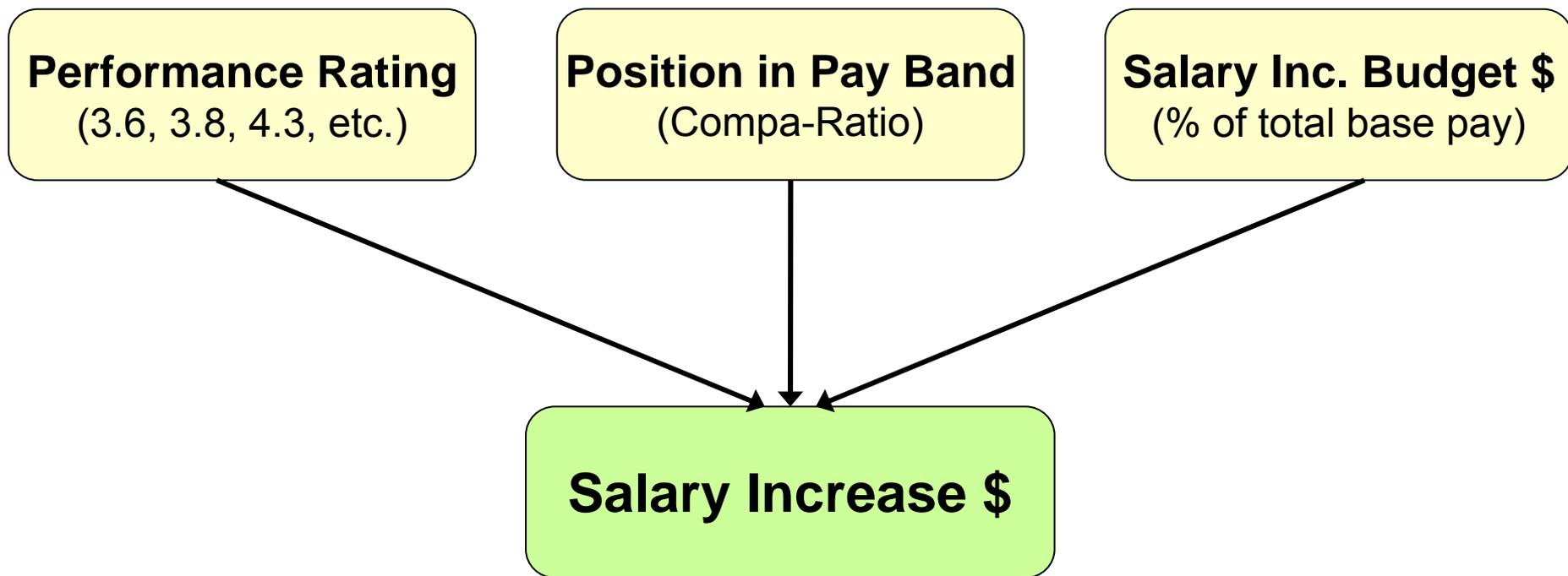
Completing the Process

Certifying Results / Employee Notices / Exporting Data

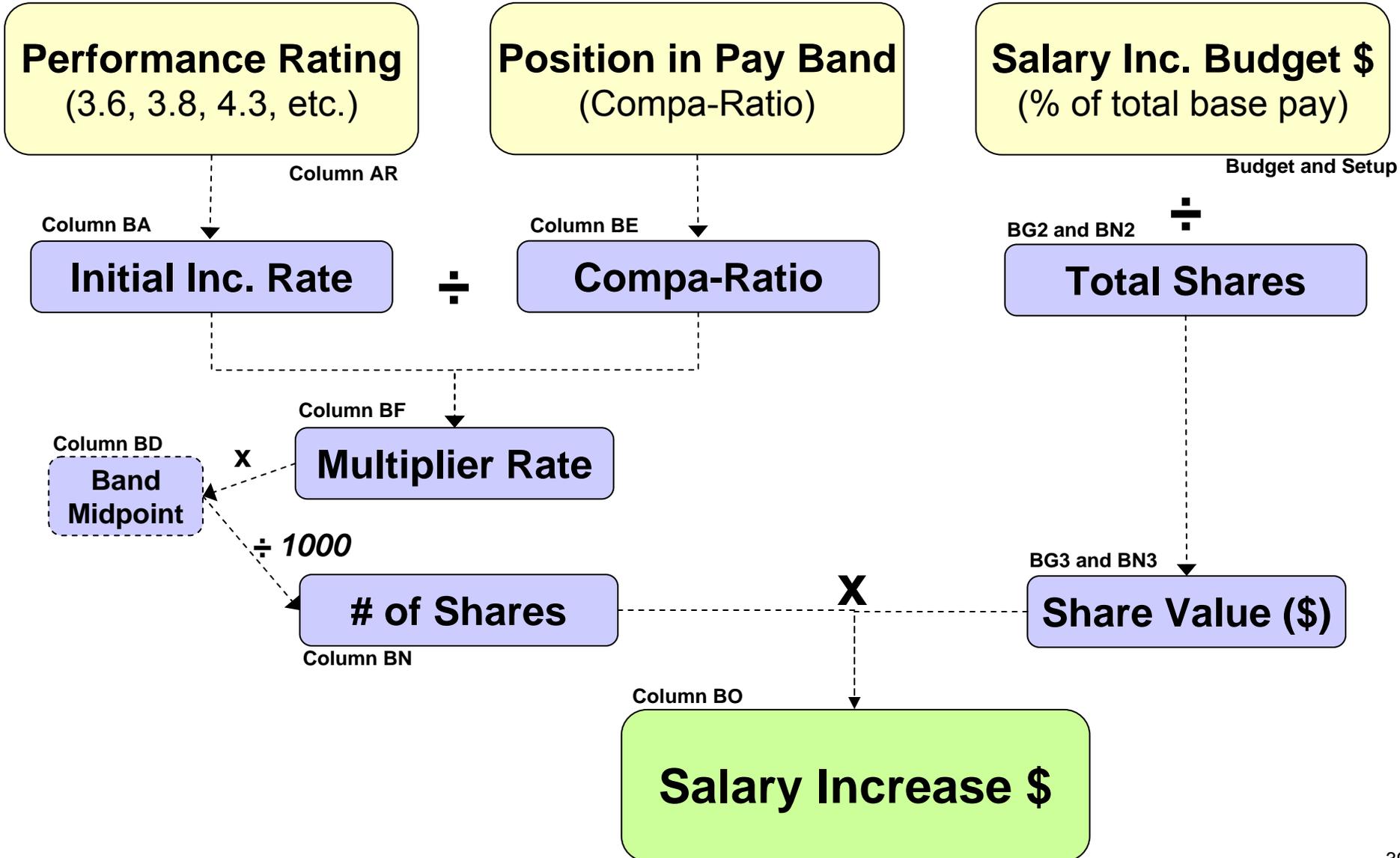


Activities

Salary Algorithm Inputs



Salary Algorithm Details



Overall Average Rating Determines Initial Inc. Rate

	Rating	Initial Inc.	Rating	Initial Inc.
Maximum rating to get a salary increase is...	5.0	→ 6.00%	3.7	→ 2.88%
5.0	4.9	→ 5.76%	3.6	→ 2.64%
	4.8	→ 5.52%	3.5	→ 2.40%
Minimum rating to get a salary increase is...	4.7	→ 5.28%	3.4	→ 2.16%
2.6	4.6	→ 5.04%	3.3	→ 1.92%
	4.5	→ 4.80%	3.2	→ 1.68%
	4.4	→ 4.56%	3.1	→ 1.44%
Algorithm uses an initial range of salary increases of...	4.3	→ 4.32%	3.0	→ 1.20%
0 to 6%	4.2	→ 4.08%	2.9	→ 0.96%
	4.1	→ 3.84%	2.8	→ 0.72%
Each salary increase	4.0	→ 3.60%	2.7	→ 0.48%
Increment rate is...	3.9	→ 3.36%	2.6	→ 0.24%
6/25 = 0.24	3.8	→ 3.12%	2.5	→ 0.00%

Base Salary & Band Midpoint Determine Compa-Ratio

What is Compa-Ratio?

- The ratio of base salary to the midpoint of the pay band

	Base Salary	Pay Band	Band Midpoint	Compa-Ratio
Employee 1	\$95,000	A	\$100,000	0.95
Employee 2	\$105,000	A	\$100,000	1.05
Employee 3	\$40,000	B	\$50,000	0.80
Employee 4	\$50,000	B	\$50,000	1.00

Initial Increase Rate & Compa-Ratio Determine Multiplier

$$\text{Initial Increase Rate} \div \text{Compa-Ratio} = \text{Multiplier}$$



	Rating	Initial Inc. Rate	Compa-Ratio	Multiplier
Employee 1	3.9	3.36%	0.95	3.54%
Employee 2	3.9	3.36%	1.05	3.20%
Employee 3	4.5	4.80%	0.80	6.00%
Employee 4	4.8	5.52%	1.00	5.52%

- Compa-ratios *less than 1.0* increase the initial increase
- Compa-ratios *greater than 1.0* decrease the initial increase

Multiplier to Shares

- Assume your salary increase budget is 2.4%

	Rating	Initial Inc. Rate	Compa-Ratio	Multiplier
Employee 1	3.9	3.36%	0.95	3.54%
Employee 2	3.9	3.36%	1.05	3.20%
Employee 3	4.5	4.80%	0.80	6.00%
Employee 4	4.8	5.52%	1.00	5.52%

- Shares are expressed as a \$ amount and the pay pool budget is fixed
- To remain in budget, the algorithm converts the multiplier to shares and then calculates the share value

Multiplier & Midpoint Determine Number of Shares

What is a Share?

- A portion of the salary increase budget allotted to an individual
- The number of shares and the value of each share is determined by the DCIPS algorithm

of Employee's Shares = (Multiplier * Band Midpoint) ÷ 1,000

	Multiplier	Band Midpoint	Shares
Employee 1	3.54%	\$100,000	3.54
Employee 2	3.20%	\$100,000	3.20
Employee 3	6.00%	\$50,000	3.00
Employee 4	5.52%	\$50,000	2.76

Salary Increase Budget & Total Shares Determine Share Value

- Assume salary increase budget of 2.4%

	Base Salary	Shares
Employee 1	\$95,000	3.54
Employee 2	\$105,000	3.20
Employee 3	\$40,000	3.00
Employee 4	\$50,000	2.76
Total	\$290,000	12.5

- Salary Increase Budget = $(\$290,000 * 2.4\%) = \$6,960$

- Share Value = Budget / Total Shares
= $\$6,960 / 12.5 = \556

Calculate Interim Salary Increase

Salary Increase = Number of Shares * Share Value

	Rating	Base Salary	Shares	Share Value	Salary Increase	Salary Increase %
Employee 1	3.9	\$95,000	3.54	\$556	\$1,968	2.07%
Employee 2	3.9	\$105,000	3.20	\$556	\$1,779	1.69%
Employee 3	4.5	\$40,000	3.00	\$556	\$1,668	4.17%
Employee 4	4.8	\$50,000	2.76	\$556	\$1,534	3.07%

- Employee 1 receives a larger salary increase than employee 2 because of position in band – even though their ratings are the same.
- Employee 3 receives a larger salary increase than employee 4 because of position in band – even though 3's rating is lower

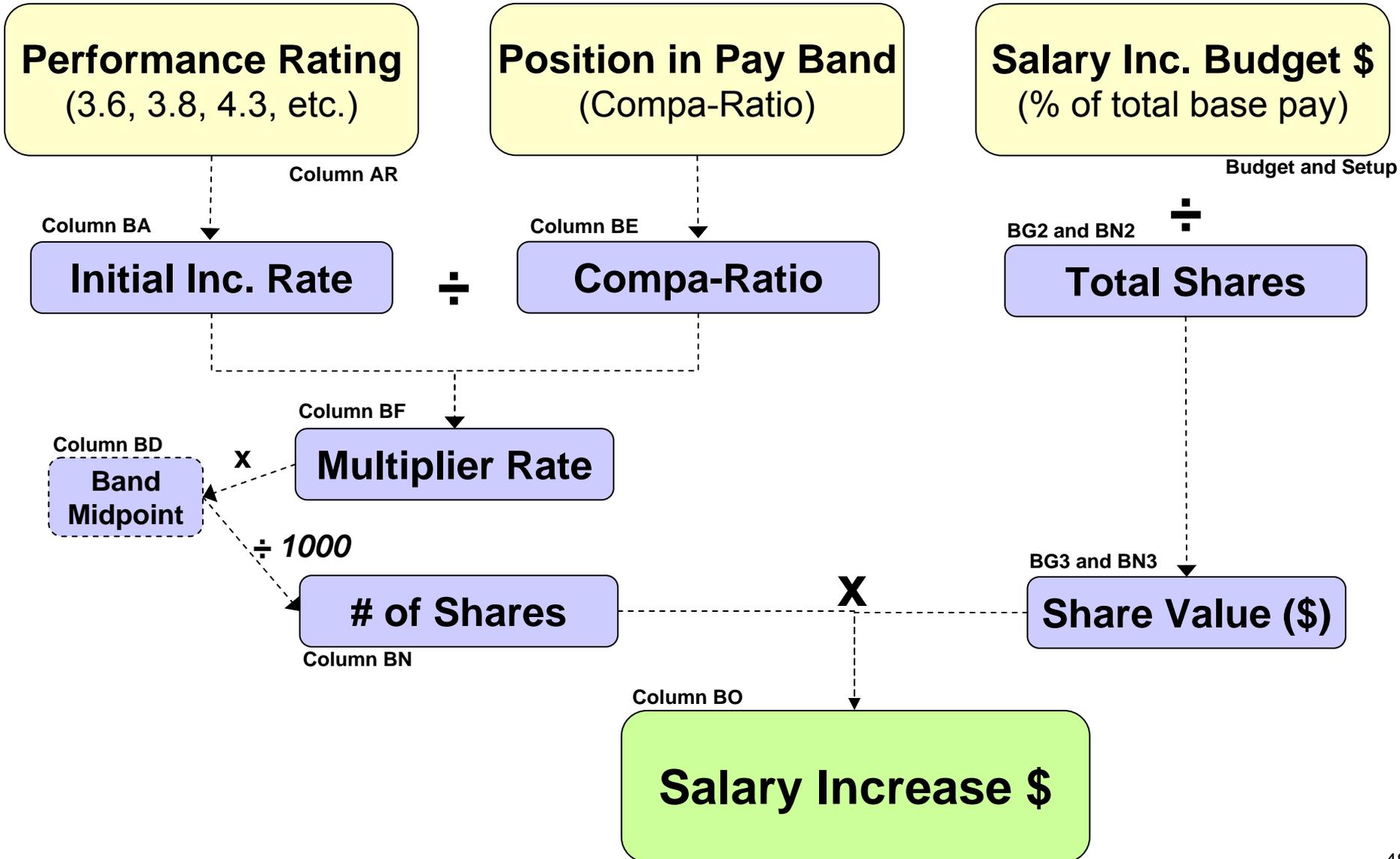
Check for Band Max & Initial Salary Increase

Check Interim Salary Increase against Pay Band Max

	Base Salary	Salary Floor Increase (2.0%)	Perf Salary Increase	Interim New Base Pay	Pay Band Max	Hit Pay Band Max?	Base Pay Incr Above PB Max
Emp 1	\$95,000	\$1,900	\$1,968	\$98,868	\$108,000	No	0
Emp 2	\$105,000	\$2,100	\$1,779	\$108,879	\$108,000	Yes	\$879
Emp 3	\$40,000	\$800	\$1,668	\$42,468	\$60,000	No	0
Emp 4	\$50,000	\$1,000	\$1,534	\$52,534	\$60,000	No	0

- ❑ Base Salary + Sal Floor Increase + Performance Sal Increase = Interim New Base Pay
- ❑ If pay band max is reached, salary increase is decreased by amount in excess of pay band max
- ❑ Amount over the band max is redistributed by algorithm to other employees
- ❑ Initial salary increase is displayed in column BO

Salary Algorithm Details



Overrides & Adjustments

Pay pool manager may adjust initial increases

❑ Overrides

- Sets employee's final shares and initial increase to zero
- Overridden salary increase is redistributed by the algorithm

❑ Adjustments

- May be positive or negative
- Drawn from adjustment funding until adjustment funding expended...then draws from algorithm
- Requires justification

Adj Funding	Total Adjustments	Remaining Adjustment Funding
\$2,000	\$0	\$2,000
Override Initial Increase	Perf. Salary Increase Adjustment	Perf. Salary Adjustment Justification
No		

Why would pay pools override or adjust a salary increase?

Using the CWB

Supporting Salary Increase Decisions

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Import Export Hide Unhide Unhide All Hide Unhide Unhide All Change View Clear All Filters Sort Validate Clear Circles Delete Row Highlight Capture Chart Images

AQ5

	A	B	AV	AW	AX	AY	AZ	BA	BB	BE	BF	BG	BH	BI	BJ	BK	BL
1	Go To:		Salary Increase														
2	Budget																
3	Ratings																
4	Salary Increase																
5	Bonus																
6	Employees: 100																
7	Visible Employees: 100																
8			Floor = 1.50%														
9																	
10																	
11	Last Name	First Name	Base Salary (end of Evaluation Period)	End Cycle Band Penetration	Salary Increase Floor (\$)	Base Pay + Salary Increase Floor	Initial Base Pay Increase Rate	Midpoint	End Cycle Compa Ratio	Multiplier	Interim Base Pay Increase Shares	Interim Base Pay Increase	Interim New Base Pay (computed)	Pay Band Max	Hit Max for Band?	Interim Base Pay Incr To Me Max	
12																	
13	Gibrar	Calek	\$59,895	89.7%	\$899	\$60,794	6.00%	\$48,504	1.23	4.86%	2.36	\$1,858	\$62,652	\$63,803	No	\$0	
14	Peake	Mark	\$103,210	110.0%	\$0	\$103,210	0.00%	\$74,487	1.39	0.00%	0.00	\$0	\$103,210	\$99,914	Yes	\$0	
15	Sherwin	Jon	\$65,909	32.1%	\$989	\$66,898	5.52%	\$74,487	0.88	6.24%	4.65	\$3,663	\$70,561	\$99,914	No	\$0	
16	Giovanni	Marie	\$105,420	75.4%	\$1,582	\$107,002	5.52%	\$94,174	1.12	4.93%	4.64	\$3,661	\$110,663	\$118,071	No	\$0	
17	Adams	Jeremiah	\$105,420	75.4%	\$1,582	\$107,002	5.52%	\$94,174	1.12	4.93%	4.64	\$3,661	\$110,663	\$118,071	No	\$0	
18	Yung	Leah	\$103,121	70.2%	\$1,547	\$104,668	5.52%	\$94,174	1.10	5.04%	4.75	\$3,742	\$108,410	\$118,071	No	\$0	
19	Green	Alphonso	\$111,031	29.7%	\$1,666	\$112,697	5.52%	\$118,473	0.94	5.89%	6.98	\$5,501	\$118,198	\$138,878	No	\$0	
20	Cooper	Julia	\$65,212	30.6%	\$979	\$66,191	4.32%	\$74,487	0.88	4.93%	3.68	\$2,897	\$69,088	\$99,914	No	\$0	
21	Farmer	Jewel	\$87,433	77.0%	\$1,312	\$88,745	4.32%	\$74,487	1.17	3.68%	2.74	\$2,161	\$90,906	\$99,914	No	\$0	
22	Lee	Nancy	\$73,090	47.1%	\$1,097	\$74,187	4.32%	\$74,487	0.98	4.40%	3.28	\$2,585	\$76,772	\$99,914	No	\$0	
23	Nash	Jessica	\$76,212	9.4%	\$1,144	\$77,356	4.32%	\$94,174	0.81	5.34%	5.03	\$3,963	\$81,319	\$118,071	No	\$0	
24	Dover	Malachi	\$105,420	75.4%	\$1,582	\$107,002	4.32%	\$94,174	1.12	3.86%	3.63	\$2,865	\$109,867	\$118,071	No	\$0	
25	Duvall	Erin	\$105,420	75.4%	\$1,582	\$107,002	4.32%	\$94,174	1.12	3.86%	3.63	\$2,865	\$109,867	\$118,071	No	\$0	
26	Hollis	Aaron	\$124,010	65.1%	\$1,861	\$125,871	4.32%	\$118,473	1.05	4.13%	4.89	\$3,854	\$129,725	\$138,878	No	\$0	
27	Legend	Jonathan	\$51,332	59.9%	\$770	\$52,102	3.84%	\$48,504	1.06	3.63%	1.76	\$1,387	\$53,489	\$63,803	No	\$0	
28	Simpson	Burton	\$55,431	10.2%	\$832	\$56,263	3.84%	\$74,487	0.74	5.16%	3.84	\$3,030	\$59,293	\$99,914	No	\$0	
29	Vogel	Hans	\$87,433	77.0%	\$1,312	\$88,745	3.84%	\$74,487	1.17	3.27%	2.44	\$1,921	\$90,666	\$99,914	No	\$0	
30	DiFranco	Martin	\$87,981	36.0%	\$1,320	\$89,301	3.84%	\$94,174	0.93	4.11%	3.87	\$3,051	\$92,352	\$118,071	No	\$0	
31	McFadden	Jackson	\$72,120	0.2%	\$1,082	\$73,202	3.84%	\$94,174	0.77	5.01%	4.72	\$3,722	\$76,924	\$118,071	No	\$0	
32	McMillan	Orlando	\$101,212	65.9%	\$1,519	\$102,731	3.84%	\$94,174	1.07	3.57%	3.36	\$2,652	\$105,383	\$118,071	No	\$0	
33	Coates	Owen	\$123,209	62.9%	\$1,849	\$125,058	3.84%	\$118,473	1.04	3.69%	4.37	\$3,448	\$128,506	\$138,878	No	\$0	

Instructions Budget and Setup Pay Pool Panel Notes Other Increases Pay Bands Summary Rating Statistics

Using the CWB

Supporting Salary Increase Decisions

Microsoft Excel - DCIPS CWB Mock2010.4.1_DRAFT_PROTOTYPE_populated.xls

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Type a question for help

BR24

Go To:		Salary Increase											
Budget													
Ratings													
Salary Increase													
Bonus													
Employees: 100													
Visible Employees: 100			Floor = 1.50%										
						Adj Funding	Total Adjustments	Remaining Adjustment Funding					
						\$2,000	\$1,500	\$500		2010			
Last Name	First Name		Base Salary (end of Evaluation Period)	Salary Increase Floor (\$)	Initial Performance Salary Incr \$	Initial Performance Salary Incr %	Override Initial Increase	Perf. Salary Increase Adjustment	Perf. Salary Adjustment Justification	Total Salary Increase (\$) (Includes Floor)	Total Salary Increase (%) (Includes Floor)	New Base Salary	Salary + LMS
Gibrar	Calek	\$59,895	\$899	\$1,858	3.10%	No			\$2,757	4.60%	\$62,652	\$77,826	
Peake	Mark	\$103,210	\$0	\$0	0.00%	No			\$0	0.00%	\$103,210	\$128,207	
Sherwin	Jon	\$65,909	\$989	\$3,663	5.56%	No	\$1,000		\$5,652	8.58%	\$71,561	\$88,894	
Giovanni	Marie	\$105,420	\$1,582	\$3,661	3.47%	No			\$5,243	4.97%	\$110,663	\$137,466	
Adams	Jeremiah	\$105,420	\$1,582	\$3,661	3.47%	No			\$5,243	4.97%	\$110,663	\$137,466	
Yung	Leah	\$103,121	\$1,547	\$3,743	3.63%	No			\$5,290	5.13%	\$108,411	\$134,668	
Green	Alphonso	\$111,031	\$1,666	\$5,501	4.95%	No	-\$1,000		\$6,167	5.55%	\$117,198	\$145,584	
Cooper	Julia	\$65,212	\$979	\$2,898	4.44%	No			\$3,877	5.94%	\$69,089	\$85,822	
Farmer	Jewel	\$87,433	\$1,312	\$2,161	2.47%	No			\$3,473	3.97%	\$90,906	\$112,924	
Lee	Nancy	\$73,090	\$1,097	\$2,585	3.54%	No	\$1,000		\$4,682	6.41%	\$77,772	\$96,609	
Nash	Jessica	\$76,212	\$1,144	\$3,963	5.20%	No	\$500		\$5,607	7.36%	\$81,819	\$101,636	
Dover	Malachi	\$105,420	\$1,582	\$2,865	2.72%	No			\$4,447	4.22%	\$109,867	\$136,477	
Duvall	Erin	\$105,420	\$1,582	\$2,865	2.72%	No			\$4,447	4.22%	\$109,867	\$136,477	
Hollis	Aaron	\$124,010	\$1,861	\$3,855	3.11%	No			\$5,716	4.61%	\$129,726	\$161,145	
Legend	Jonathan	\$51,332	\$770	\$1,387	2.70%	No			\$2,157	4.20%	\$53,489	\$66,445	
Simpson	Burton	\$55,431	\$832	\$3,030	5.47%	No			\$3,862	6.97%	\$59,293	\$73,654	
Vogel	Hans	\$87,433	\$1,312	\$1,921	2.20%	No			\$3,233	3.70%	\$90,666	\$112,625	
DiFranco	Martin	\$87,981	\$1,320	\$3,052	3.47%	No			\$4,372	4.97%	\$92,353	\$114,720	
McFadden	Jackson	\$72,120	\$1,082	\$3,723	5.16%	No			\$4,805	6.66%	\$76,925	\$95,556	
McMillan	Orlando	\$101,212	\$1,519	\$2,653	2.62%	No			\$4,172	4.12%	\$105,384	\$130,908	
Cnates	Owen	\$123,209	\$1,849	\$3,449	2.80%	No			\$5,298	4.30%	\$128,507	\$159,631	

Instructions / Budget and Setup / Pay Pool Panel / Notes / Other Increases / Pay Bands / Summary / Rating Statistics

Ready NUM

Using the CWB

Supporting Salary Increase Decisions

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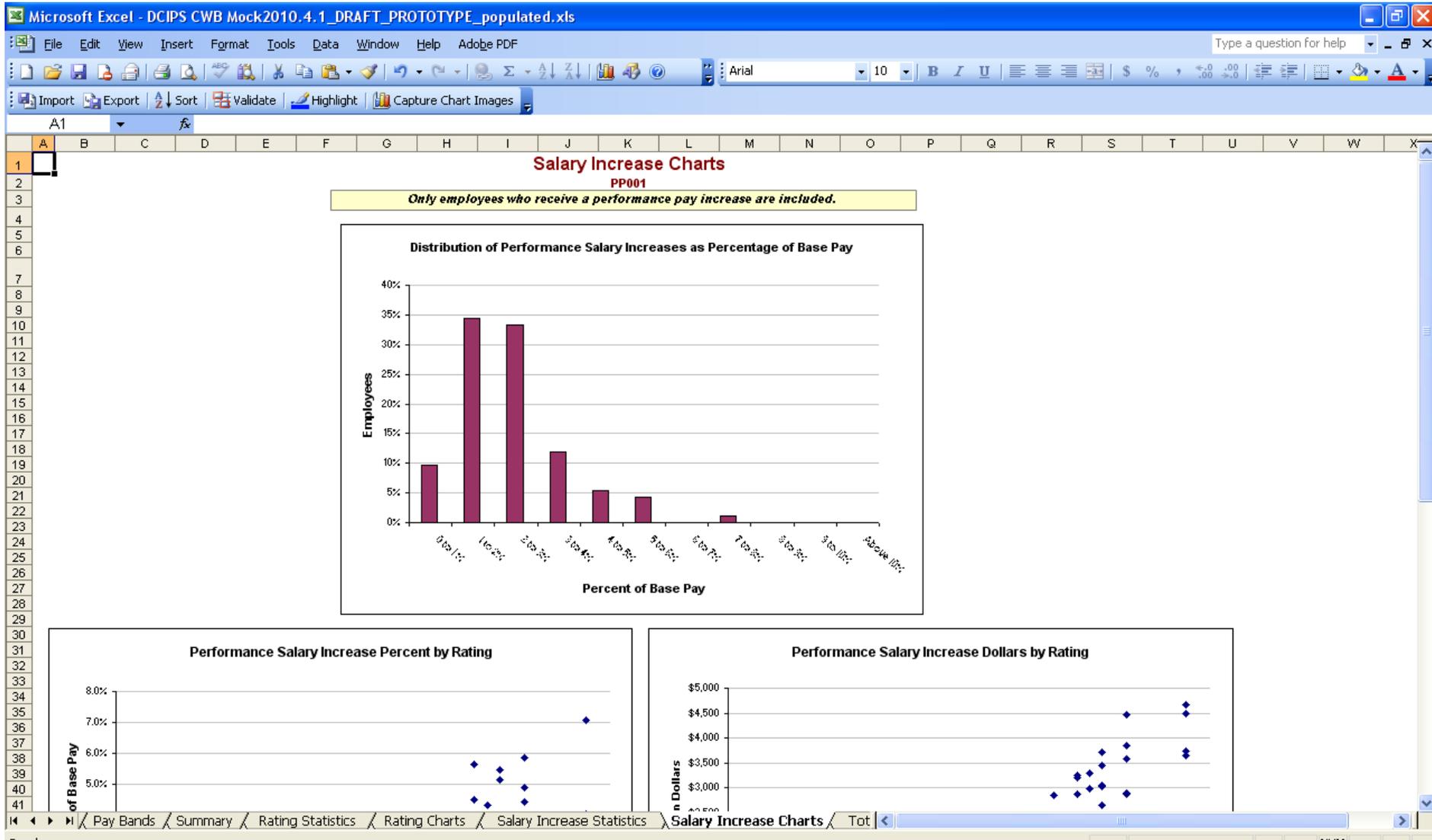
A1 fx

A		B	C	D	E	F	G	H	I	J	K	L	M	N
1	Wildcard Statistics by:		Salary Increase Statistics for Pay Pool PP001											
2	Includes Rated Employees Eligible for a Salary Increase													
3	<input type="text"/> <input type="button" value="Refresh Wildcard"/>		Average Overall Rating	Average Base Salary	Average Compa Ratio	Average Performance Salary Increase (\$)	Average Performance Salary Increase (%)	Average Total Salary Increase (\$)	Average Total Salary Increase (%)	Number of Employees	Employees Analyzed	Employees Rcv Perf Salary Increase		
6	Entire Pay Pool		3.61	\$83,737	0.99	\$1,871	2.29%	\$3,116	3.75%	100	96	93		
7	Pay Band													
9	1		3.50	\$32,112	0.99	\$614	1.91%	\$1,096	3.41%	1	1	1		
10	2		3.79	\$51,822	1.07	\$1,084	2.08%	\$1,885	3.56%	9	9	9		
11	3		3.48	\$70,308	0.94	\$1,616	2.39%	\$2,632	3.79%	37	33	30		
12	4		3.66	\$94,758	1.01	\$2,092	2.27%	\$3,514	3.78%	43	43	43		
13	5		3.67	\$114,551	0.97	\$2,595	2.26%	\$4,314	3.76%	10	10	10		
15	Organization ID 1													
17	OFC/AAA		3.62	\$81,669	0.99	\$1,842	2.41%	\$3,065	3.85%	24	21	20		
18	OFC/BBB		3.67	\$82,957	0.99	\$1,912	2.35%	\$3,157	3.85%	24	23	23		
19	OFC/CCC		3.58	\$84,918	0.98	\$1,864	2.22%	\$3,119	3.67%	52	52	50		
21	Organization ID 2													
23	Division 1		3.66	\$82,520	1.00	\$1,881	2.41%	\$3,116	3.85%	26	23	22		
24	Division 2		3.60	\$82,460	0.99	\$1,844	2.27%	\$3,064	3.73%	59	58	56		
25	Division 3		3.58	\$90,541	0.97	\$1,962	2.20%	\$3,320	3.70%	15	15	15		
27	Reviewing Official													
29	Gayl Jones		3.61	\$83,737	0.99	\$1,871	2.29%	\$3,116	3.75%	100	96	93		
31	Rating Official													

Notes / Other Increases / Pay Bands / Summary / Rating Statistics / Rating Charts / Salary Increase Statistics / Sal

Using the CWB

Supporting Salary Increase Decisions



Hands-On Exercises



Activities

15 Minutes

Using sorts, filters, and wildcards

(these exercises are completed in pay pool panel worksheet)

- Sort by Initial Performance Salary Increase % (column BP)
- Sort by Overall Average Rating (column AR)

-
- Filter to show only pay band 3 employees who received an initial performance salary increase % over 2.0%
 - Hint: set filters on columns S and BP

-
- Use wildcards and filters to hide 5 employees
 - Enter the word “hide” into wildcard column 3 (column AU)
 - Use the filter to select “blanks”
 - Question:
 - *How else could you use this feature?*

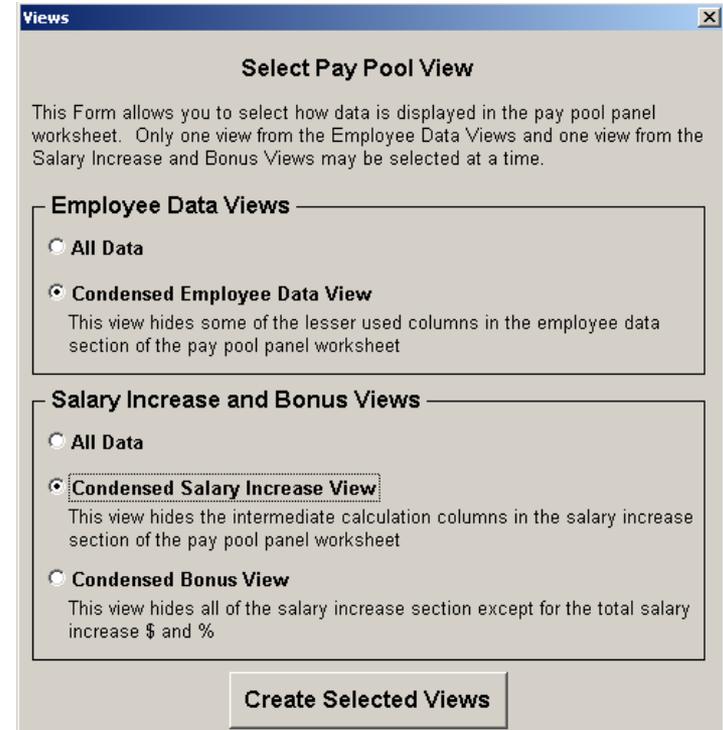
Using Views

- Select the “Change View” button from the custom toolbar

- Select the following options
 - Condensed Employee Data View
 - Condensed Salary Increase View

- Notice that many of the salary increase columns are hidden

- How would you reset the view to show all the columns?



The screenshot shows a window titled "Views" with a close button (X) in the top right corner. The main title is "Select Pay Pool View". Below the title is a paragraph of text: "This Form allows you to select how data is displayed in the pay pool panel worksheet. Only one view from the Employee Data Views and one view from the Salary Increase and Bonus Views may be selected at a time." There are two main sections, each with a title and a list of radio button options. The first section is "Employee Data Views" and contains two options: "All Data" (unselected) and "Condensed Employee Data View" (selected). Below the second option is a descriptive text: "This view hides some of the lesser used columns in the employee data section of the pay pool panel worksheet". The second section is "Salary Increase and Bonus Views" and contains three options: "All Data" (unselected), "Condensed Salary Increase View" (selected), and "Condensed Bonus View" (unselected). Below the second option is a descriptive text: "This view hides the intermediate calculation columns in the salary increase section of the pay pool panel worksheet". Below the third option is a descriptive text: "This view hides all of the salary increase section except for the total salary increase \$ and %". At the bottom right of the dialog is a button labeled "Create Selected Views".

Using Overrides and Adjustments

- Ensure you have entered \$5,000 (you did this in exercise 3) for salary adjustment funding in the budget and setup worksheet

- Enter \$4,000 in the adjustment column (BR) for Jon Sherwin
 - Questions:
 - *What happens to Jon's salary increase?*
 - *What is the impact to everyone else's salary increase?*
 - *Are there any employees that can not receive an adjustment?*

- Enter \$6,000 in the adjustment column (BR) for Jon Sherwin
 - Question:
 - *What happens when you overspend the adjustment funding?*

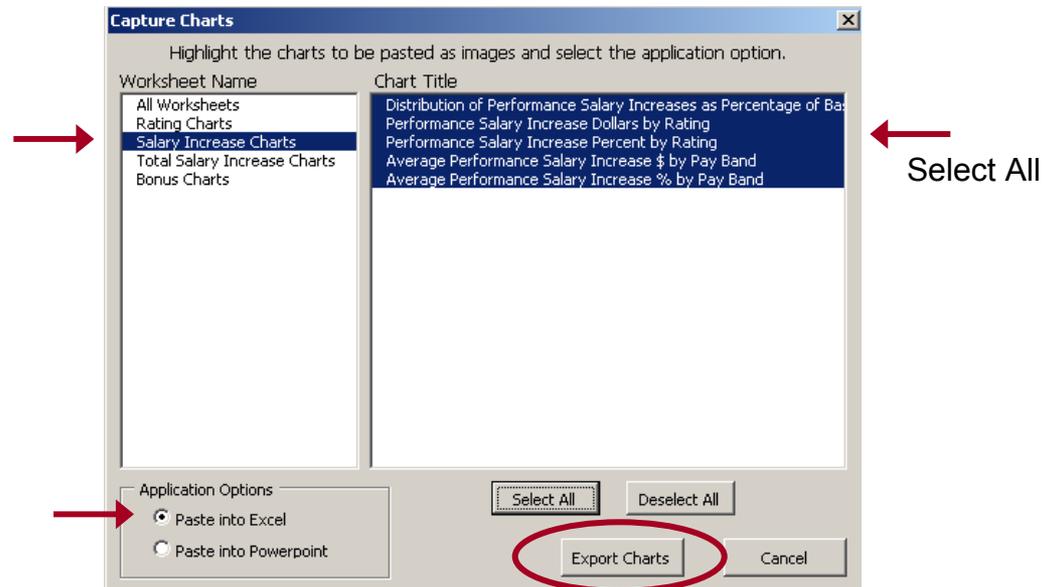
Using Overrides and Adjustments (continued)

- Change override from No to Yes for Jon Sherwin
 - Questions:
 - *What happens to the initial values calculated by the CWB?*
 - *What is the impact to everyone else's salary increase?*

Salary Increase Statistics and Charts

- ❑ View the Salary Increase Statistics worksheet
 - *What is the overall average performance salary increase for the pay pool? What is the average total increase? What causes the difference?*

- ❑ Select the Capture Charts button in the custom toolbar
 - Generate all the charts in the Salary Increase Charts worksheet in Excel format



- Sorts, filters, and wildcards
 - What else could you use wildcard columns for?
 - Does the sort feature in the filter work?
- Using views
 - How would you reset the view to show all the columns?
 - How can you create your own view of the data?
- Overrides and adjustments
 - What happens when you overspend your adjustment funding?
 - How do adjustments impact other employees?
 - Are there any employees that can not receive an adjustment?
 - How do you “add back” unused adjustment funds to the budget?
- Salary increase statistics and charts
 - How can you generate statistics for your own custom groups of employees?

Lesson 1:
Introduction

Lesson 2:
Pay Pool Process Review and CWB Overview

Lesson 3:
DCPDS CWB Extract and CWB Import

Lesson 4:
Setting the Pay Pool Budget and Administrator Options

Lesson 5:
Supporting Salary Increase Decisions

Lesson 6:
Supporting Bonus Decisions

Lesson 7:
Completing the Process
Certifying Results / Employee Notices / Exporting Data



Activities

Bonus Algorithm Basics

- ❑ Algorithm links bonus to performance rating using a share concept
 - Threshold rating receives 1 bonus share
 - Each tenth of a rating higher receives X% more shares than the previous rating
 - The larger the range in performance being recognized the larger the range in shares (bonuses)

- ❑ Algorithm links bonus to pay band by using the band midpoint
 - A given rating receives the same percentage of midpoint – irrespective of pay band
 - Employees with the same rating in the same band receive the same \$ bonus
 - As pay band increases, the dollar amount of the bonus increases because the band midpoint is larger for higher bands

Bonus Algorithm Inputs

Bonus Algorithm Parameters

Performance Rating
(3.6, 3.8, 4.3, etc.)

Pay Band Midpoint

Bonus Budget \$
(% of total base pay)

Bonus \$

```
graph TD; A[Performance Rating] --> D[Bonus $]; B[Pay Band Midpoint] --> D; C[Bonus Budget $] --> D;
```


□ **Rating Threshold**

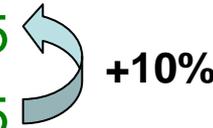
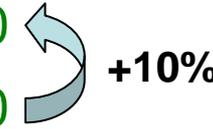
- Entered on the pay pool panel worksheet (Cell CT 6)
- Minimum **overall average rating (e.g., 4.1)** to receive a bonus
- Must be 2.6 or greater

□ **Share Increment**

- Entered on the Budget and Setup worksheet
- Sets the % increase in shares as overall average rating increases
 - *For example, assume that the share increment is 10%. If the rating threshold is 4.0, a rating of 4.0 would get 1 share, a rating of 4.1 would get 1.1 shares, a rating of 4.2 would get 1.21 shares, etc.*
- The larger the share increment, the larger the range in bonuses

Share Increment Example

- ❑ A pay pool sets their share increment to 10%
 - Each additional tenth of a rating receives 10% more shares than the previous rating

Rating		Shares	
5.0	→	2.61	
4.9	→	2.36	
4.8	→	2.15	
4.7	→	1.95	
4.6	→	1.77	
4.5	→	1.61	
4.4	→	1.46	
4.3	→	1.33	
4.2	→	1.21	
4.1	→	1.10	
4.0	→	1.00	

- ❑ A pay pool sets the rating threshold to 4.0
- ❑ Question
 - What would happen to the range of shares if the threshold was set to 4.6?

Share Midpoint Product

Bonus Budget & Total Shares Determine Share Value

Assume Bonus Budget of 1.8% and Rating Threshold of 4.0



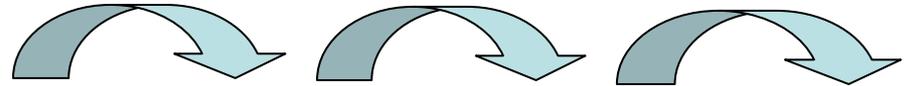
	Base Salary	Rating	Bonus Shares	Band Midpoint	Share-Midpoint Product
Emp 1	\$95,000	3.9	0	\$100,000	0
Emp 2	\$105,000	4.0	1.00	\$100,000	100,000
Emp 3	\$40,000	4.5	1.61	\$50,000	80,500
Emp 4	\$50,000	4.8	2.14	\$50,000	107,000
Total	\$290,000				287,500

□ Bonus Budget = $(\$290,000 * 1.8\%) = \$5,220$

□ Share Value = Bonus Budget / \sum "Share-Midpoint Product"
 $= \$5,220 / 287,500 = 0.018156 \approx 1.8156\%$

Calculate Bonus

Number of Shares * Share Value * Midpoint = Bonus

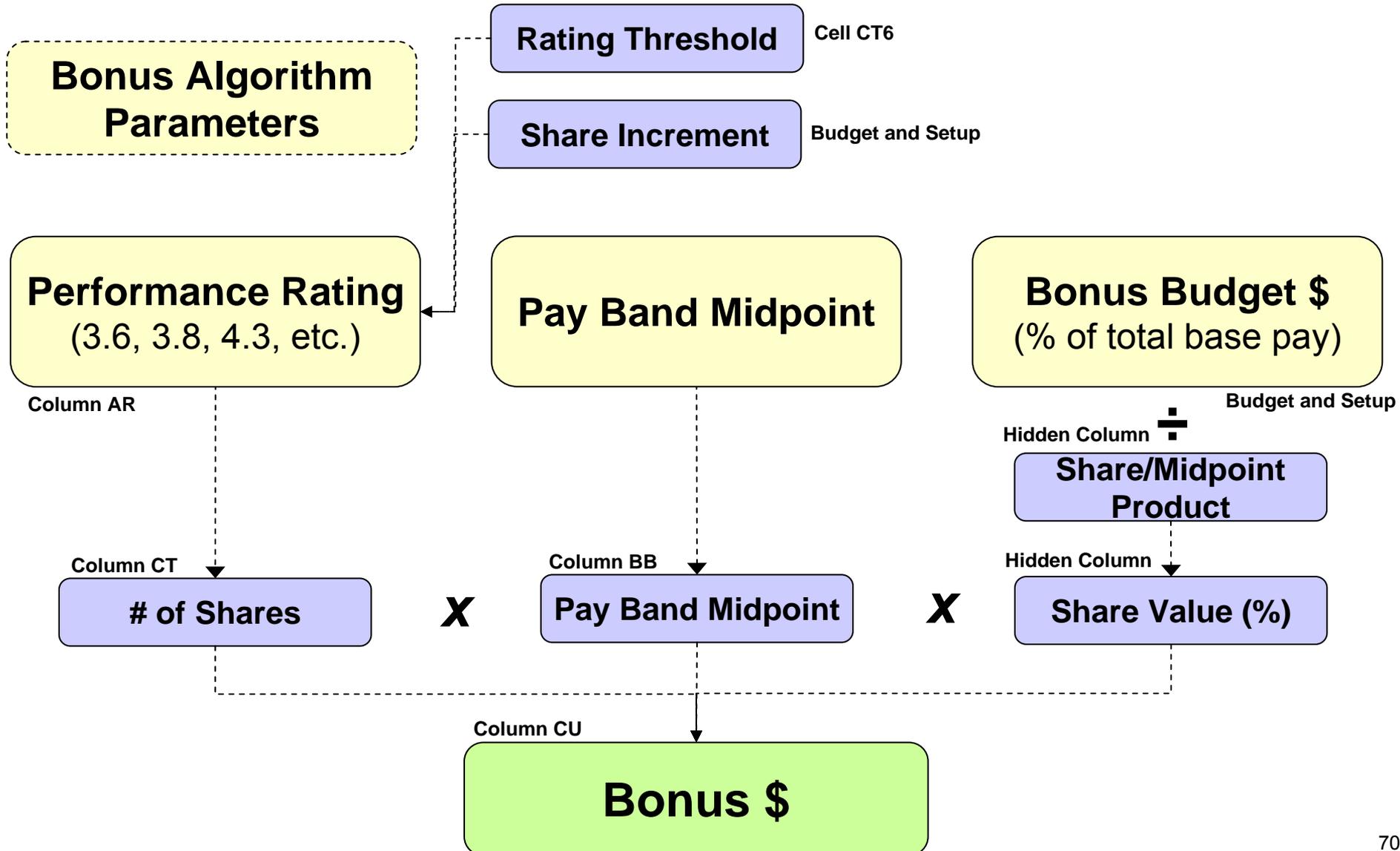


	Base Salary	Rating	Bonus Shares	Share Value	Band Midpoint	Bonus Amount
Emp 1	\$95,000	3.9	0	1.8156%	\$100,000	\$0
Emp 2	\$105,000	4.0	1.00	1.8156%	\$100,000	\$1,816
Emp 3	\$40,000	4.5	1.61	1.8156%	\$50,000	\$1,462
Emp 4	\$50,000	4.8	2.14	1.8156%	\$50,000	\$1,943
Total	\$290,000					\$5,220

❑ Question

- What would happen to the share value if the pay pool lowers the rating threshold to 3.8?

Bonus Algorithm Details



Using the CWB

Supporting Bonus Decisions

Microsoft Excel - DCIPS CWB Mock2010.4.1_DRAFT_PROTOTYPE_populated.xls

File Edit View Insert Format Tools Data Window Help Adobe PDF

Type a question for help

Import Export Hide Unhide Unhide All Hide Unhide Unhide All Change View Clear All Filters Sort Validate Clear Circles Delete Row Highlight Capture Chart Images

bonus Bonus

	A	B	CP	CQ	CR	CS	CT	CU	CV	CW	CX	CY	CZ	DA	DB
1	Go To:						Impact of Decisions				Bonus Budget				
2	Budget		Bonus	Employees Receiving Bonus			41	41.8%			Total Bonus Funding	\$148,377	1.80%	% of Budget	
3	Ratings					Min Bonus	\$1,505	3.10%		of band midpoint	Allocated Via Algorithm	\$148,377	1.80%	100.0%	
4	Salary Increase					Max Bonus	\$8,721	8.91%		of band midpoint	Allocated Via Adjustment	\$0	0.00%	0.0%	
5	Bonus										Total Funds Allocated	\$148,377	1.80%	100.0%	
6						Rating Threshold	3.8					Funds Remaining	\$0	0.00%	0.0%
7															
8	Employees:	100													
9	Visible Employees:	100													
10															
	Last Name	First Name													
				Awards Received This Rating Period	Total \$ of Awards Received	Overall Average Rating	Bonus Shares	Initial Bonus (\$)	Override Initial Bonus	Bonus Adjustment \$	Bonus Adjustment Justification	Total Bonus \$	Total Bonus (% of Midpoint)	Total Bonus (% of Base Salary)	Wildcard
11															
12															
13	Gibrar	Calek				5.0	3.16	\$4,323	No			\$4,323	8.91%	7.22%	wc6
14	Peake	Mark				4.8	2.61	\$5,483	No			\$5,483	7.36%	5.31%	
15	Sherwin	Jon				4.8	2.61	\$5,483	No			\$5,483	7.36%	8.32%	
16	Giovanni	Marie				4.8	2.61	\$6,933	No			\$6,933	7.36%	6.58%	
17	Adams	Jeremiah				4.8	2.61	\$6,933	No			\$6,933	7.36%	6.58%	
18	Yung	Leah				4.8	2.61	\$6,933	No			\$6,933	7.36%	6.72%	
19	Green	Alphonso				4.8	2.61	\$8,721	No			\$8,721	7.36%	7.85%	
20	Cooper	Julia				4.3	1.61	\$3,382	No			\$3,382	4.54%	5.19%	
21	Farmer	Jewel				4.3	1.61	\$3,382	No			\$3,382	4.54%	3.87%	
22	Lee	Nancy				4.3	1.61	\$3,382	No			\$3,382	4.54%	4.63%	
23	Nash	Jessica				4.3	1.61	\$4,276	No			\$4,276	4.54%	5.61%	
24	Dover	Malachi				4.3	1.61	\$4,276	No			\$4,276	4.54%	4.06%	
25	Duvall	Erin				4.3	1.61	\$4,276	No			\$4,276	4.54%	4.06%	
26	Hollis	Aaron				4.3	1.61	\$5,380	No			\$5,380	4.54%	4.34%	
27	Legend	Jonathan				4.1	1.33	\$1,819	No			\$1,819	3.75%	3.54%	
28	Simpson	Burton				4.1	1.33	\$2,794	No			\$2,794	3.75%	5.04%	
29	Vogel	Hans				4.1	1.33	\$2,794	No			\$2,794	3.75%	3.20%	
30	DiFranco	Martin				4.1	1.33	\$3,533	No			\$3,533	3.75%	4.02%	
31	McFadden	Jackson				4.1	1.33	\$3,533	No			\$3,533	3.75%	4.90%	
32	McMillan	Orlando		1	\$500	4.1	1.33	\$3,533	No			\$3,533	3.75%	3.49%	
33	Cofrances	Owen				4.1	1.33	\$4,444	No			\$4,444	3.75%	3.61%	

Rating Sort Share Incr. 10.00%

Adj Funding Total Adjustments Remaining Adjustment Funding

\$0 \$0 \$0

Pay Pool Panel Notes Other Increases Pay Bands Summary Rating Statistics Rating Charts Salary Increases

Using the CWB

Supporting Bonus Decisions

Microsoft Excel - DCIPS CWB Mock2010.4.1_DRAFT_PROTOTYPE_populated.xls

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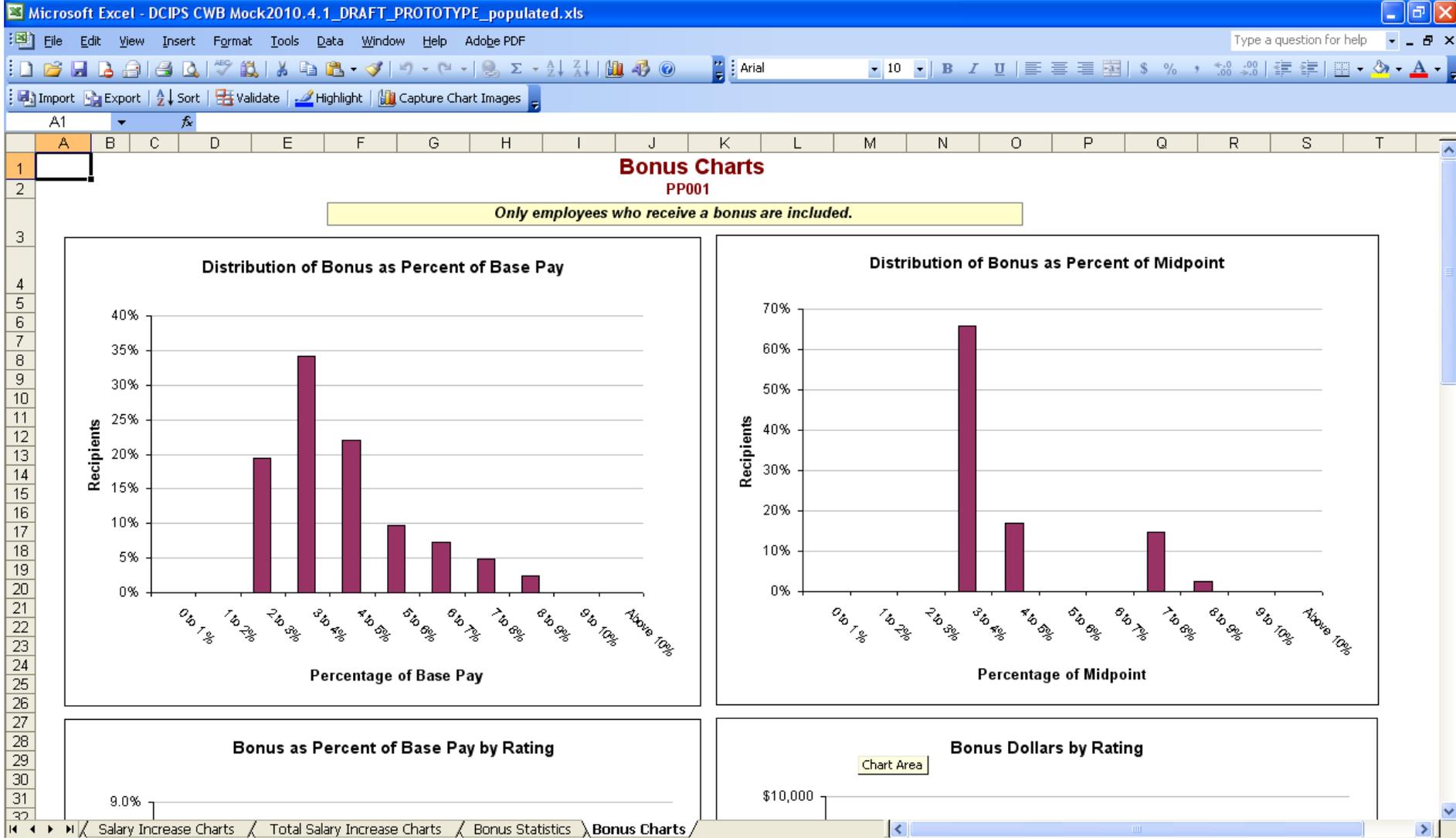
A1

Bonus Statistics										
Includes Employees Receiving a Bonus										
Wildcard Statistics by:										
[Dropdown]										
Refresh Wildcard										
	Average Overall Rating	Average Base Salary	Average Compa Ratio	Average Bonus (\$)	Average Bonus (% of Midpoint)	Employees Rated	Number of Employees Rated and Bonus Eligible	Employees Receiving Bonus	Pct of Employees with Bonus	
Entire Pay Pool	4.18	\$85,081	1.01	\$3,619	4.27%	98	98	41	41.8%	
Pay Band										
1						1	1	0	0.0%	
2	4.18	\$55,160	1.14	\$2,161	4.45%	9	9	5	55.6%	
3	4.18	\$72,967	0.98	\$3,156	4.24%	35	35	13	37.1%	
4	4.15	\$94,199	1.00	\$3,912	4.15%	43	43	19	44.2%	
5	4.28	\$118,546	1.00	\$5,555	4.69%	10	10	4	40.0%	
Organization ID 1										
OFC/AAA	4.10	\$78,374	0.95	\$3,102	4.01%	22	22	9	40.9%	
OFC/BBB	4.20	\$85,628	1.04	\$3,632	4.34%	24	24	11	45.8%	
OFC/CCC	4.20	\$87,670	1.02	\$3,833	4.34%	52	52	21	40.4%	
Organization ID 2										
Division 1	4.09	\$80,752	0.99	\$3,093	3.93%	24	24	11	45.8%	
Division 2	4.20	\$85,302	1.02	\$3,739	4.38%	59	59	25	42.4%	
Division 3	4.22	\$93,505	0.99	\$4,175	4.43%	15	15	5	33.3%	
Reviewing Official										
Gayl Jones	4.18	\$85,081	1.01	\$3,619	4.27%	98	98	41	41.8%	
Rating Official										

Salary Increase Statistics / Salary Increase Charts / Total Salary Increase Charts / **Bonus Statistics** / Bonus Charts

Using the CWB

Supporting Bonus Decisions



Hands-On Exercises



Activities

15 Minutes

Setting a Rating Threshold

- Sort by Overall Average Rating (Hint...there is a link in Cell CS 10)

- Set the rating threshold at 3.6
 - Question:
 - *How many employees will receive a bonus?*

- Change the rating threshold to 4.2
 - Question:
 - *How many employees will receive a bonus now?*

- Find the rating threshold that limits bonus eligibility to about the top 35% of employees
 - Question:
 - *What did you find out when trying this?*

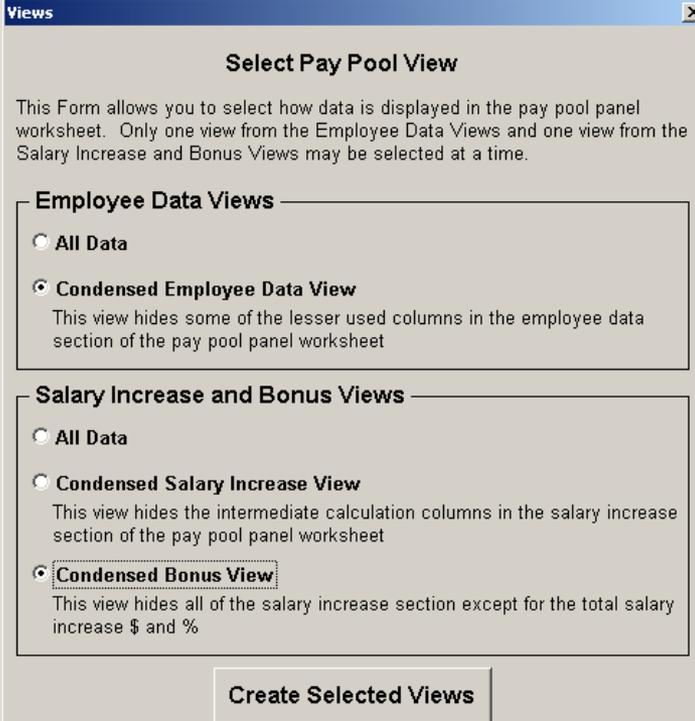
Using Views

- Select the “Change View” button from the custom toolbar

- Select the following options
 - Condensed Employee Data View
 - Condensed Bonus View

- Notice how the columns are hidden (are any bonus columns actually hidden?)

- How would you reset the view to show all the columns?



The screenshot shows a dialog box titled "Views" with a close button (X) in the top right corner. The main title is "Select Pay Pool View". Below the title is a descriptive paragraph: "This Form allows you to select how data is displayed in the pay pool panel worksheet. Only one view from the Employee Data Views and one view from the Salary Increase and Bonus Views may be selected at a time." The dialog is divided into two sections: "Employee Data Views" and "Salary Increase and Bonus Views". In the "Employee Data Views" section, there are three radio button options: "All Data", "Condensed Employee Data View" (which is selected), and "Condensed Salary Increase View". Below the "Condensed Employee Data View" option is a descriptive text: "This view hides some of the lesser used columns in the employee data section of the pay pool panel worksheet". In the "Salary Increase and Bonus Views" section, there are three radio button options: "All Data", "Condensed Salary Increase View", and "Condensed Bonus View" (which is selected). Below the "Condensed Bonus View" option is a descriptive text: "This view hides all of the salary increase section except for the total salary increase \$ and %". At the bottom of the dialog is a button labeled "Create Selected Views".

Using Overrides and Adjustments

- Change the rating threshold to 3.8

- Find Darlene Brown and enter \$2,000 in the adjustment column
 - Questions:
 - *What happens to Darlene's bonus amount?*
 - *What is the impact to the other employees' bonus amounts?*
 - *What happens to the adjustment balance?*

- Find Calek Gibrar and enter -\$1,000 in the adjustment column
 - Questions:
 - *What happens to Calek's bonus amount?*
 - *What happens to the adjustment balance?*

Setting a rating threshold

- Is it always possible to set a threshold that results in an exact target percentage (e.g., 50%)?

Using views

- Are any of the bonus columns hidden using the “condensed bonus view?”

Overrides and adjustments

- How do adjustments impact other employees?
- Are there any employees that can not receive a bonus adjustment?

Lesson 1:

Introduction

Lesson 2:

Pay Pool Process Review and CWB Overview

Lesson 3:

DCPDS CWB Extract and CWB Import

Lesson 4:

Setting the Pay Pool Budget and Administrator Options

Lesson 5:

Supporting Salary Increase Decisions

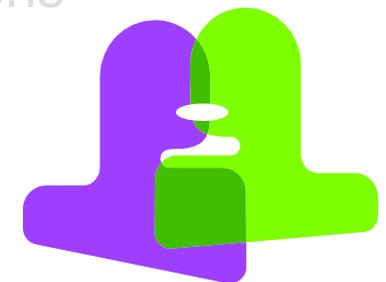
Lesson 6:

Supporting Bonus Decisions

Lesson 7:

Completing the Process

Certifying Results / Employee Notices / Exporting Data

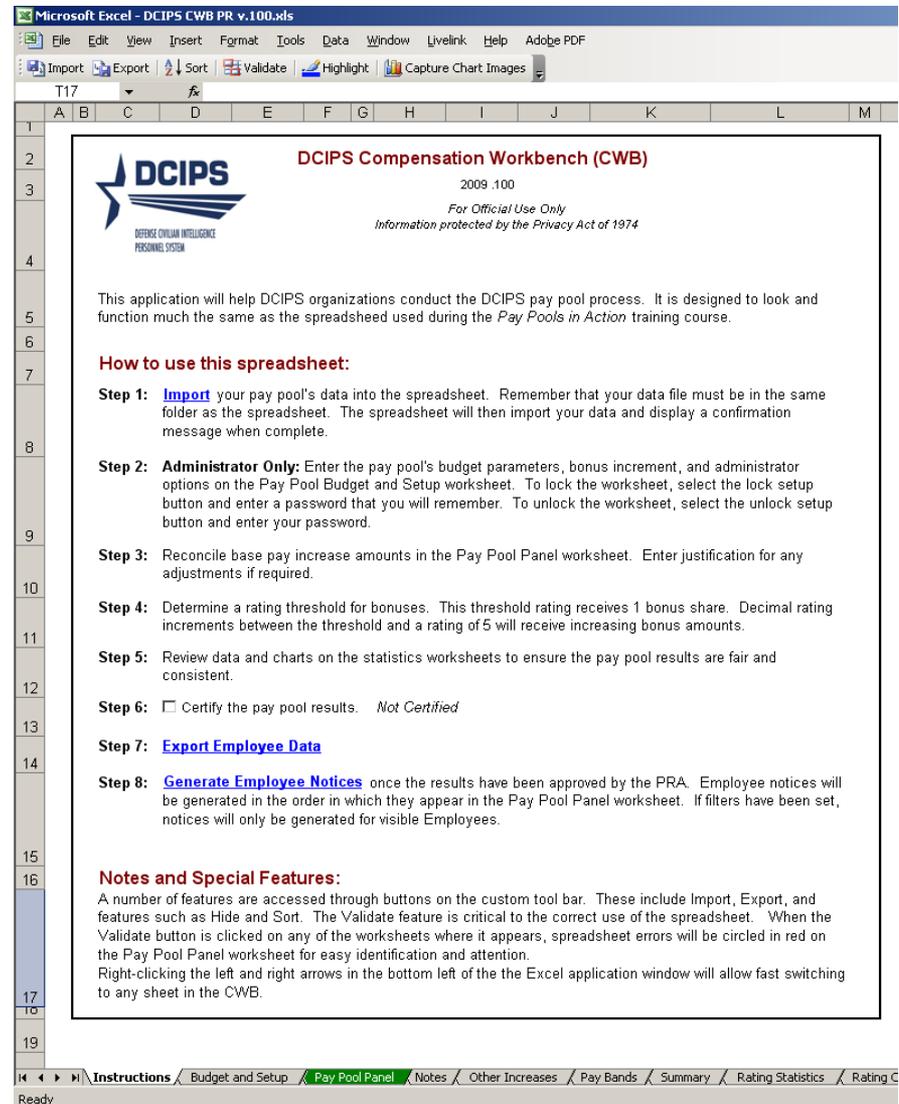


Activities

Using the CWB

Completing the Process

- ❑ **Step 6 – Certify the Pay Pool Results** -- certify after the pay pool results are final
- ❑ **Step 7 – Export Employee Data** – export your data only after approval by the PRA. This creates the upload file that flows back into your DCPDS
- ❑ **Step 8 – Generate Employee Notices** – generate only after PRA approval



Microsoft Excel - DCIPS CWB PR v.1.00.xls

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Import Export Sort Validate Highlight Capture Chart Images

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DCIPS Compensation Workbench (CWB)

2009 .100
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This application will help DCIPS organizations conduct the DCIPS pay pool process. It is designed to look and function much the same as the spreadsheet used during the *Pay Pools in Action* training course.

How to use this spreadsheet:

Step 1: [Import](#) your pay pool's data into the spreadsheet. Remember that your data file must be in the same folder as the spreadsheet. The spreadsheet will then import your data and display a confirmation message when complete.

Step 2: Administrator Only: Enter the pay pool's budget parameters, bonus increment, and administrator options on the Pay Pool Budget and Setup worksheet. To lock the worksheet, select the lock setup button and enter a password that you will remember. To unlock the worksheet, select the unlock setup button and enter your password.

Step 3: Reconcile base pay increase amounts in the Pay Pool Panel worksheet. Enter justification for any adjustments if required.

Step 4: Determine a rating threshold for bonuses. This threshold rating receives 1 bonus share. Decimal rating increments between the threshold and a rating of 5 will receive increasing bonus amounts.

Step 5: Review data and charts on the statistics worksheets to ensure the pay pool results are fair and consistent.

Step 6: Certify the pay pool results. *Not Certified*

Step 7: [Export Employee Data](#)

Step 8: [Generate Employee Notices](#) once the results have been approved by the PRA. Employee notices will be generated in the order in which they appear in the Pay Pool Panel worksheet. If filters have been set, notices will only be generated for visible Employees.

Notes and Special Features:

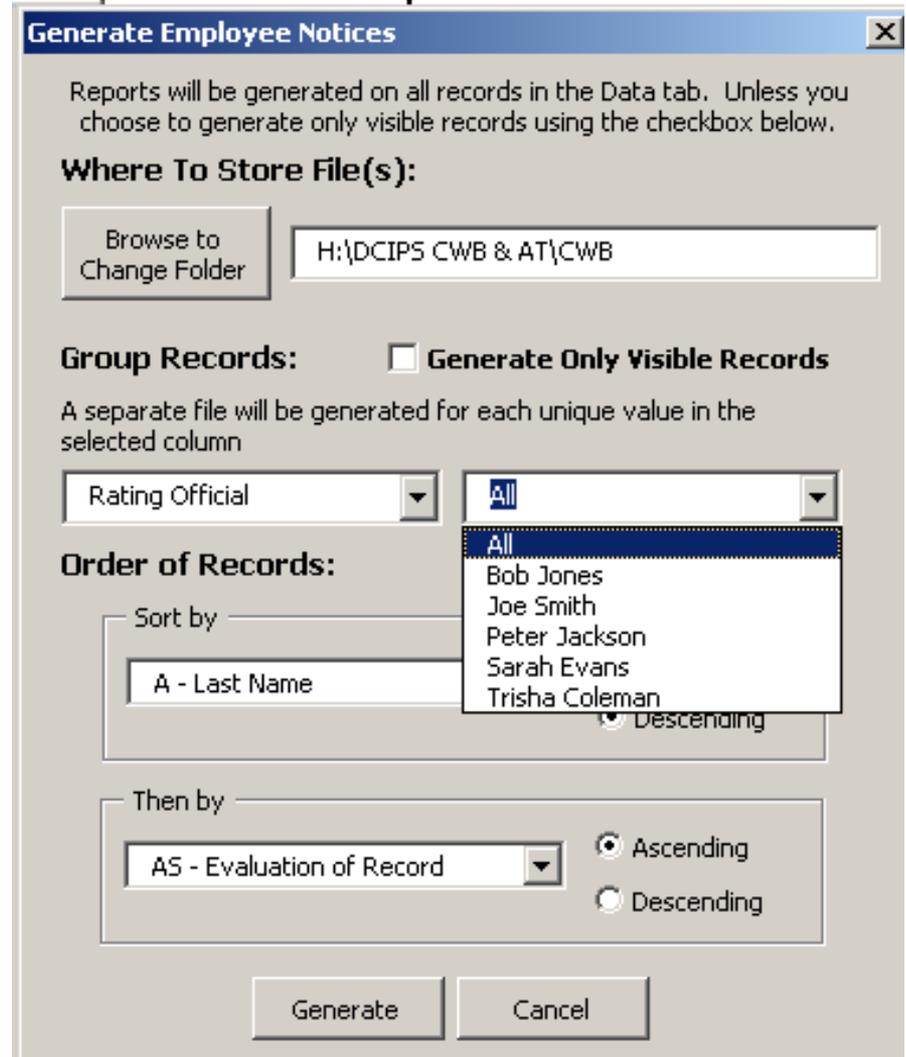
A number of features are accessed through buttons on the custom tool bar. These include Import, Export, and features such as Hide and Sort. The Validate feature is critical to the correct use of the spreadsheet. When the Validate button is clicked on any of the worksheets where it appears, spreadsheet errors will be circled in red on the Pay Pool Panel worksheet for easy identification and attention. Right-clicking the left and right arrows in the bottom left of the the Excel application window will allow fast switching to any sheet in the CWB.

Instructions Budget and Setup Pay Pool Panel Notes Other Increases Pay Bands Summary Rating Statistics Rating C

Ready

Generating Employee Notices

- ❑ Each notice is different Excel worksheet (not workbook)
- ❑ Can generate by subset (organization, rating official, wildcard, etc.)
- ❑ Can generate visible records only (from Pay Pool Panel worksheet)
- ❑ Can set sort order (2 levels)
- ❑ Can set folder location to store notices



Generate Employee Notices

Reports will be generated on all records in the Data tab. Unless you choose to generate only visible records using the checkbox below.

Where To Store File(s):

Browse to Change Folder: H:\DCIPS CWB & AT\CWB

Group Records: **Generate Only Visible Records**

A separate file will be generated for each unique value in the selected column

Rating Official: [All] (Dropdown menu open showing: All, Bob Jones, Joe Smith, Peter Jackson, Sarah Evans, Trisha Coleman)

Order of Records:

Sort by: A - Last Name

Then by: AS - Evaluation of Record (Ascending selected)

Buttons: Generate, Cancel

Hands-On Exercises



Activities

15 Minutes

Certifying your pay pool data

- Check the Certify checkbox in step 6
- Uncheck the Certify checkbox
 - Question:
 - *What happens when you uncheck the box?*
- The pay pool manager and pay pool PRA names you type into the boxes will print on the employee notice form

Exporting your pay pool data for upload into DCPDS

- Ensure your CWB is certified

- Select the export link in step 7 on the Budget and Setup worksheet

- Notice the file name that is automatically generated

- Save your export file
 - *Question: Why is the date important on the export file?*

Generating Employee Notices

- Enter some comments to print on Shawn Comb's employee notice form (hint: use column G on the notes worksheet)
- Ensure your CWB is certified
- Select the Generate Employee Notices link in step 8 on the Instructions worksheet
- Generate the forms for just the employees that work for Trisha Coleman (Hint...Trisha is a rating official)
 - Do not print the forms
- Find Shawn Comb's employee notice form
 - *Question: Can you edit the form?*

Exporting CWB data

- Why is it a good idea to include the date in your export files?

Generating employee notices

- Is it possible to create and edit the remarks on the form? What are the two ways to do so?

Lesson 1:
Introduction

Lesson 2:
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Lesson 6:
Supporting Bonus Decisions

Lesson 7:
Completing the Process
Certifying Results / Employee Notices / Exporting Data



Thank You!

**Remember
to Practice
and Read the
User Guide!**

**Best of Luck
with Your
Pay Pools!**

Please complete a course evaluation before you leave