



DoD Civilian Acquisition Workforce Personnel Demonstration Project (AcqDemo)

**Sub-Panel and Compensation
Management Spreadsheet (CMS) and
Pay Pool Analysis Tool (PAT) for Pay
Pool Administrators**

**Presented by AcqDemo Program Office
Fall - 2016**

- Housekeeping, Expectations and Parking Lot
- Course Objectives
- Course Agenda
- Did You Do the Work-Aheads?



- At the completion of this course, participants will be able to
- Review changes for 2016
 - Summarize the main functionalities of the Sub-Panel, Compensation Management (CMS), and Pay Pool Analysis Tool (PAT) tools
 - Understand the structure of the Sub-Panel, CMS and PAT tools
 - Understand the overall role of a Pay Pool Administrator
 - Know when and how to make a “round trip” between Sub-Panel spreadsheet or CMS and CAS2Net
 - Understand how to use the Sub-Panel and CMS tools when supporting a sub pay pool or a pay pool
 - Understand how to pull data into the PAT and how to use it to review rating and payout results

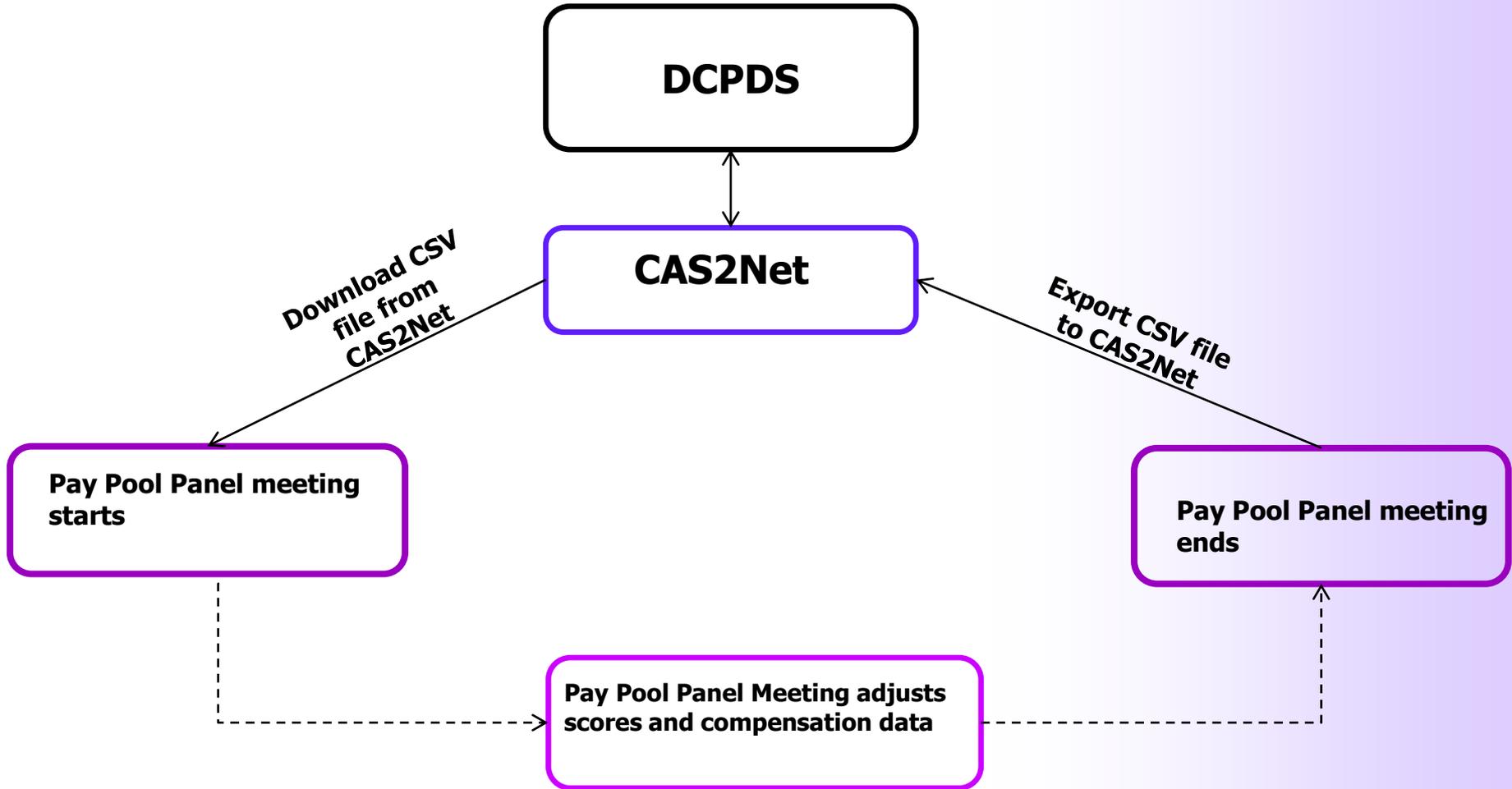
- Added capability to select new targets for Contribution Awards
- Dropped the check box for “use awards” because everyone uses them

Role of the Pay Pool Administrator

- Ensure personnel data are correct in CAS2Net
- Monitor the organization's progress in the CCAS process (scores, assessments, sub-panel meetings, etc)
- Use the CCAS Software to present data that managers need in order to make informed and sound appraisal decisions
- Shortly after the start of each pay period during the months of September through December, go to Pay Pool Notices in CAS2Net to find the by pay period Discrepancy Report for your pay pool
 - Verify any discrepancies noted by correcting CAS2Net data or confer with the personnel office if you think the data from the Defense Civilian Personnel Data System (DCPDS) in the discrepancy report is incorrect

- React to pay pool managers as they decide if first-level supervisors are going to recommend just category factor scores (i.e., 3M, 4L) or category and integer factor scores
 - Communicate with pay pool managers to become aware of decision
 - Use that knowledge when reviewing data downloaded to spreadsheets
- Remind pay pool managers that determining factor scores is a multi-step process
 - Employees describe their contribution on each factor
 - First level supervisors describe the employee's contribution from their perspective
 - First level supervisors determine the contribution level for each factor by comparing the contribution description to the standard AcqDemo descriptors and discriminators, available at:
http://www.acq.osd.mil/dpap/ops/factor_descriptors_and_discriminators.html
 - First level supervisors identify the level of contribution (1-4) and breakout within that level (L,M,H)
 - They then select the appropriate preliminary score, such as 3L, 4M, etc. to recommend for the employee

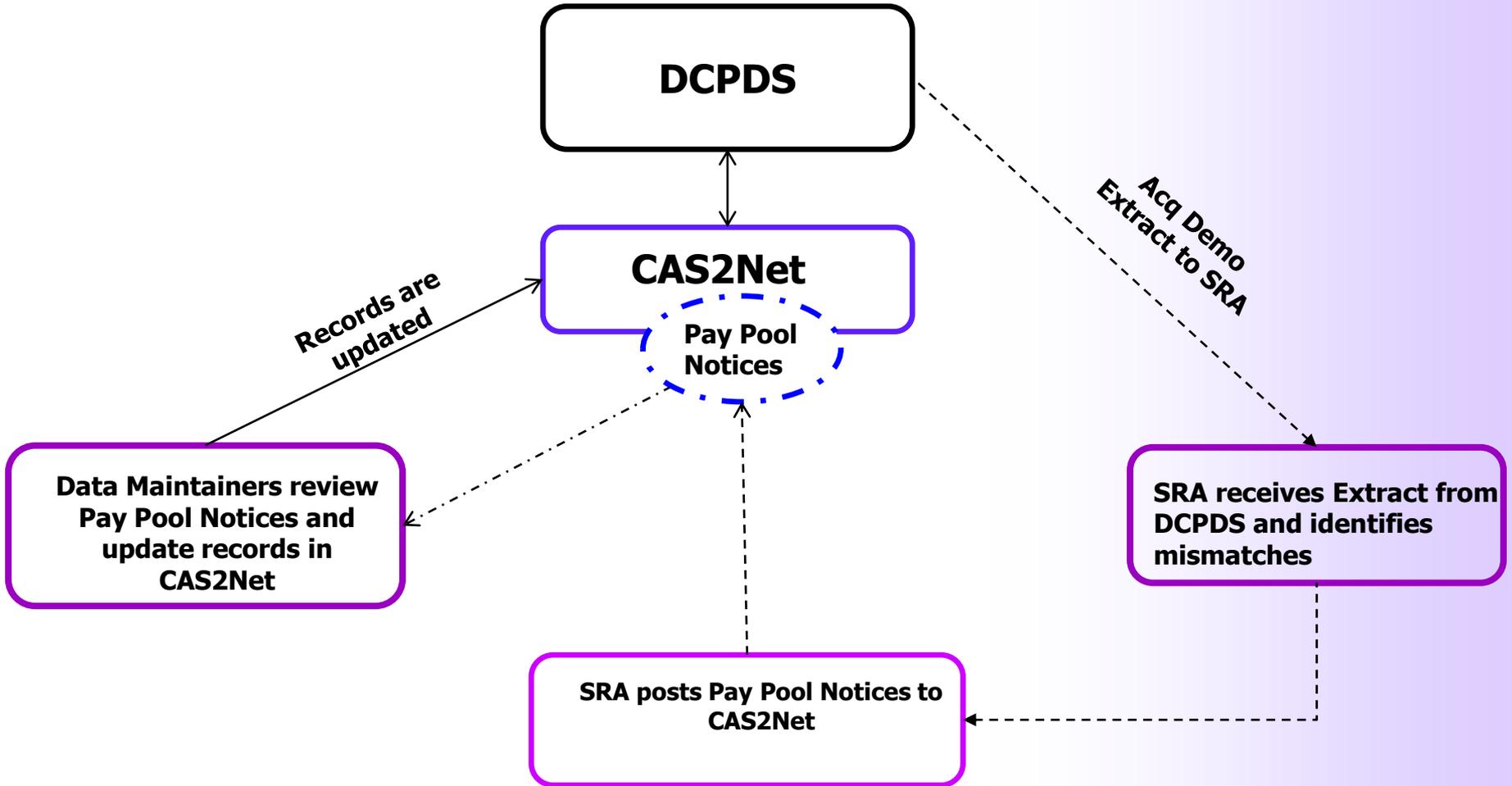
CCAS Data Processing for Pay Pool Meetings



- Use CAS2Net to download and upload data adjustments without compromising changes made during the pay pool
- Use CCAS Software functionality to import and export the CSV file (Text File)

- If a SW issue is discovered during the pay pools, you will receive a new spreadsheet in Pay Pool Notices;
 - If currently using a spreadsheet, do an Export and Upload; download the new Spreadsheet, do a Download and Import and continue working
 - This process will save the work you have already done in the Sub-Panel or CMS tools
 - If data was already uploaded, perform the same steps starting with download the new Spreadsheet

Monthly Data Refresh Process



- If an error is discovered during a pay pool regarding a salary for example, you cannot change the salary in the spreadsheet
 - Export and upload to CAS2Net to keep any recent changes you made
 - Make the salary change in CAS2Net
 - Download and import to Spreadsheet
 - Continue your pay pool work

- In any CMS, Sub Panel or PAT Spreadsheet, a yellow-colored cell in a dataset conventionally means it can be edited. White cells are either downloaded or computed
- Values entered or computed in a “Wildcard” cell will be saved in any export back to CAS2Net, and will be returned to this same worksheet in subsequent imports
- Formulas entered in this column will not be preserved through subsequent export-import cycles **unless the formula is also entered in the yellow cell immediately below the wide gray line after the last person's record**
- The formula is only saved if you import back into the same spreadsheet you used to do the export
- You can change the column heading by clicking in the cell immediately above the heading, using the down arrow to enter the cell, and changing the heading in the formula bar

Loading Sub-Panel or CMS Tools for a Sub Pay Pool or Pay Pool

- From CAS2Net Menu, select “Offline Interface”
- Select the pay pool from the picklist you wish to work with (in case you are responsible for several pay pools)
- Click “Download Employee Data” button
- Select applicable file
 - Entire pay pool (“CMS”)
 - Sub pay pools (shows sub panel manager’s name)

Civilian Acquisition Workforce Personnel Demonstration Project, Department of Defense (DDC)

- Employee Menu**
 - Contribution Planning
 - Mid-Point Review Self-Assessment
 - Annual Appraisal Self-Assessment
 - Closeout Self-Assessment
 - Reports
- Full Access User Menu**
 - Welcome
 - Reports
 - Data Maintenance
 - Session Maintenance
 - Offline Interface**
 - Paypool Notices
 - Demo Reset
 - RT Database Maintenance

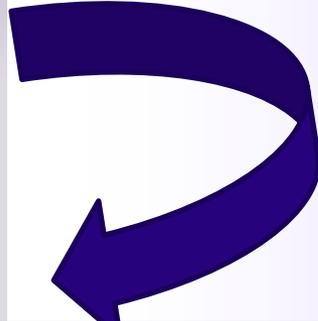
Offline Interface

Offline Interface Menu

Pay Pool:

Download:
 Last completed download: None

Upload:
 Last completed upload: None



Offline Interface - Download Employee Data

Download Instructions

NOTE: Files are dynamically generated and the server may take several minutes before download starts. Please be patient and do not repeatedly request a download file which will cause the server to slow down further and may generate duplicate appraisal records. To save a linked file to your computer, use a right mouse button click on the link and choose "Save Target As..."

Sub-Panel Meeting choices without hot links for the files have been locked. Contact your pay pool administrator if you need to unlock a meeting.

Paypool	File Name	File Description
AMC/LH	ppAMCLH_to_CMS.csv	Paypool: AMC/LH
	ppAMCLH_to_Sub-Panel_Chris_Babbitt.csv	Sub-Panel Manager: Chris Babbitt
	ppAMCLH_to_Sub-Panel_Francis_Freeman.csv	Sub-Panel Manager: Francis Freeman
	ppAMCLH_to_Sub-Panel_Nancy_Michelson.csv	Sub-Panel Manager: Nancy Michelson
	ppAMCLH_to_Sub-Panel_(No_Sub-Panel).csv	Sub-Panel Manager: None Assigned
	ppAMCLH_to_Sub-Panel_Tony_Hoang.csv	Sub-Panel Manager: Tony Hoang

[Return to Offline Interface Main Menu]

- The naming convention for CSV files helps identify the data source and the file function
 - Pay Pool import file from CAS2net to CMS Spreadsheet:
 - pp(Pay Pool Name)_to_CMS.csv
 - Example: **ppAMCLH_to_CMS.csv** where AMCLH is Pay Pool Name
 - Sub-Pay Pool import file from CAS2Net to Sub-Panel Spreadsheet:
 - pp(Pay Pool Name)_to_Sub-Panel_(Sub Panel Manager Name).csv
 - Example: **ppAMCLH_to_Sub-Panel_Bob_Arnold.csv** where Bob Arnold is the sub panel manager's name
 - Pay Pool export file from CMS Spreadsheet:
 - pp(Pay Pool Name) to Master.csv
 - Example: **ppAMCLH_to_Master.csv**
 - Sub-Pay Pool export file from Sub-Panel Spreadsheet:
 - Pp(Pay Pool Name)_Sub-Panel_()_to_Master_(Sub Panel Manager Name).csv
 - Example: **ppAMCLH_to_Master_Bob_Arnold.csv**
- Sub-panel managers and pay pool managers can access their own files for download

Cycle	CRI%	CRI Set-A	Awd%	Awd Set-A	Beta 1 (CR	Beta 2 (CA	Minimum	Min CRI C	Min CA ar	Type	Pay Cap 2	Pay Cap 2f	Use CA			
2014	2	0	1	2	1	1	0	0	0	PAY	157100	155500	1			
G	SPLStep1	SPLbase	NH1	NH2	NH3	NH4	NJ1	NJ2	NJ3	NJ4	NK1	NK2	NK3	Locality Co	AK	AT
1	17981	1.020043	32510	66687	95049	132118	32510	49904	66687	95049	32510	45061	60699	Locality R	24.69	19.29
Last Name	First Name	Middle Ini	Suffix	ID	Paypool	Office Syn	WildCard	Presumpt	Retained	Career Pa	Broadban	Occ Series	Starting B	Locality Co	Previous C	Start Date
Freeman	Francis			2	AMC/LH	AMC/LH		0	0	NH		2	318	58000	WA	61 25-Jan-99
Garfield	George			3	AMC/LH	AMC/LHAA		0	0	NH		3	856	79000	WA	68 #####
CURTISS	Dan			4	AMC/LH	AMC/LHA		0	0	NH		4	830	106600	WA	100 18-Jul-01
Gonzalez	Helena			6	AMC/LH	AMC/LHB		0	0	NH		4	340	111400	LA	100 25-Jan-99
Olson	Peter			10	AMC/LH	AMC/LHBA		0	1	NH		4	850	163275	LA	103 25-Jan-99
Quarles	Richard			11	AMC/LH	AMC/LHBA		0	0	NH		4	830	118000	ZX	100 25-Jan-99
Stewart	Tammy			12	AMC/LH	AMC/LHBB		0	0	NH		4	830	120000	SD	100 25-Jan-99
Udell	Vincent			13	AMC/LH	AMC/LHBB		0	0	NH		3	850	89900	LA	83 25-Jan-99
Yates	Zane			14	AMC/LH	AMC/LHBB		0	0	NJ		4	802	88300	LA	83 25-Jan-99
Artis	Amy			19	AMC/LH			0	0	NK		2	318	43500	WA	45 19-Jan-99
Burns	Barry			20	AMC/LH	AMC/LHAA		0	0	NH		3	340	82597	LA	77 25-Jul-11
Donaldson	Dennis			22	AMC/LH	AMC/LHAA		0	0	NK		2	318	44000	LA	46 25-Jan-99
Evans	Erin			23	AMC/LH	AMC/LHAB		0	0	NH		3	830	78000	LA	78 25-Jan-99
Grimes	Garth			25	AMC/LH	AMC/LHAA		0	0	NH		3	343	55800	LA	65 25-Jan-99

- The result of the download is a text file that
 - holds employee data
 - is formatted for importing into the Sub-Panel or CMS tools (note that the formats are different and the tool will generate a warning message if you try to import the wrong type of file)

Enable Content when opening the CMS to allow the macros to function properly

The screenshot shows a spreadsheet interface with a yellow security warning at the top: "Security Warning Some active content has been disabled. Click for more details. Enable Content". The spreadsheet title is "Compensation Management Spreadsheet". Below the title, there is a description: "Cycle: 2014 Version: Dev 27. The purpose of this spreadsheet is to record appraisal scores and set basic pay rates and contribution-based financial awards." The interface includes several sections with instructions and links:

- Data/Spreadsheet Download** -- Download the data file from the website, then click on Import to load the file into this spreadsheet. (Links: [Import](#), [View](#), [Export](#))
- Pay Pool Data** (Links: [Import](#), [View](#), [Export](#))
- Appraisal Score Entry** -- Once the file has been downloaded, review the data and final scores for each factor. (Link: [Use Today](#))
- Score Normalization** -- Compare and scale differences. Run preferred order and CA parameters and assign scores.
- Data Maintenance** -- All additions and changes to the data are done in the central database. A "Data Maintenance" card are locked. To preserve the data in the spreadsheet and upload to the central database, use the "Data Maintenance" information in the database.
- Final "G" Setting** -- This spreadsheet is used to set the final "G" value. Once you have been notified that the data is ready for CAS2Net. The final "G" value at download of your payroll data.
- Final Compensation Setting** -- Use the "Final Compensation Setting" card to finalize the pay adjustments and upload the data to the central database.
- Data Upload** -- Use Export to download the data from the spreadsheet and upload the data to the central database on the website. (Links: [Current Pay & 2014 SPL](#), [New Pay & 2015 SPL](#))
- Generate Part 1's** -- First use the filters to select employees; sort data by preferred order; then click on the Generate Part 1 to generate Part 1 of the Appraisal Form for each selected employee. (Link: [Open Existing Evaluation](#))

A large yellow text box is overlaid on the spreadsheet, containing the text: "Macros have not been enabled for the CMS." The spreadsheet interface includes a menu bar at the bottom with options: Contents, Parameters, Data, Matrix, Rails, Delta Stats, Delta Plot, Cur OCS, New OCS, Summary.

Compensation Management Spreadsheet

Cycle: 2015 Version: PR 02

The purpose of this spreadsheet is to record appraisal scores and set basic pay rates and contribution-based financial awards.

Data/Spreadsheet Download -- Download the data file from the CAS²Net, then click on Import to load the file into this spreadsheet.

Appraisal Score Entry -- Once the file has been loaded, assign categorical and final scores for each factor, and view reports and graphs.

Score Normalization -- Compare score distributions to look for anomalies and scale differences. Run preliminary pay adjustment scenarios. Set CRI and CA parameters and assign pay outs to employees.

Data Maintenance -- All additions, deletions, and modifications must be done in the central database. All columns except for data entry and "wild-card" are locked. To preserve your work, export the data from this spreadsheet and upload to CAS²Net before changing any information in CAS²Net.

Final "G" Setting -- This spreadsheet comes with a best estimate of "G." Once you have been notified that "G" is set, make a final round trip to CAS²Net. The final "G" value and related parameters will be included in the download of your paypool data.

Final Compensation Setting -- After the final round trip to update "G", finalize the pay adjustments and awards for your pay pool.

Data Upload -- Use Export to create a file for uploading the results from your pay pool to CAS²Net.

Generate Part 1's -- First use the filters to select employees; sort data by preferred order; then click on the Generate Part I to generate Part I of the Appraisal Form for each selected employee.

Pay Pool Data Last Import: 8/19/2015 (11:16:36 AM)(CDT)
[Import](#) [View](#) [Export](#) Last Export:
 Last Modified:

Parameters
[Set CRI and CA Parameters](#)

Summary Reports
[Rails Report](#)
[Career Path Factor Matrices ranked by Final Score](#)
[Summary Statistics of Delta OCS](#)
[Distribution of Delta OCS](#)
[Customizable Summary](#)

Scatter-plots of OCS Score by Salary
[Current Pay & 2015 SPL](#) [New Pay & 2016 SPL](#)

Part 1 of Appraisal Forms
[Open Existing Evaluation](#)

Validate Data, then use the filters to select individuals and use sort to put the data in preferred order.
[Generate Part 1 of Appraisal Forms](#)

Contents Parameters Data Matrix Rails Delta Stats Delta Plot Cur OCS New OCS Summary

Importing CSV and Clear Wildcard

Compensation Management Spreadsheet

Cycle: 2015 Version: PR 02

The purpose of this spreadsheet is to record appraisal scores and set basic pay rates and contribution-based financial awards.

Data/Spreadsheet Download -- Download the data file from the CAS²Net, then click on Import to load the file into this spreadsheet.

Appraisal Score Entry -- Once the file has been loaded, assign categorical and final scores for each factor, and view reports and graphs.

Score Normalization -- Compare score distributions to look for anomalies and scale differences. Run preliminary pay adjustment scenarios. Set CRI and CA parameters and assign pay outs to employees.

Data Maintenance -- All additions, deletions, and modifications must be done in the central database. All columns except for data entry and "wild-card" are locked. To preserve your work, export the data from this spreadsheet and upload to CAS²Net before changing any information in CAS²Net.

Final "G" Setting -- This spreadsheet comes with a best estimate of "G." Once you have been notified that "G" is set, make a final round trip to CAS²Net. The final "G" value and related parameters will be included in the download of your payroll data.

Final Compensation Setting -- After the final round trip to update "G", finalize the pay adjustments and awards for your pay pool.

Data Upload -- Use Export to create a file for uploading the results from your pay pool to CAS²Net.

Generate Part 1's -- First use the filters to select employees; sort data by preferred order; then click on the Generate Part I to generate Part I of the Appraisal Form for each selected employee.

Pay Pool Data
[Import](#) [View](#) [Export](#)

Last Import:
 Last Export:
 Last Modified:

Parameters
[Set CRI and CA Parameters](#)

Clear Wildcard Data?

Since this is the first time you are importing to this CMS, would you like to clear the Wildcard column data? You will have to make a round trip for this to take affect in CAS²Net.

[Appraisal Score](#)

Scatter-plots of OCS Score by Salary
[Current Pay & 2015 SPL](#) [New Pay & 2016 SPL](#)

Part 1 of Appraisal Forms
[Open Existing Evaluation](#)

Validate Data, then use the filters to select individuals and use sort to put the data in preferred order.

[Generate Part 1 of Appraisal Forms](#)

Contents Parameters Data Matrix Rails Delta Stats Delta Plot Cur OCS New OCS Summary

"Import Complete" indicates the CSV file has imported correctly

The screenshot shows a web browser displaying a 'Compensation Management Spreadsheet' interface. The page title is 'Compensation Management Spreadsheet' in a red banner. Below the banner, there is a navigation menu with tabs: Contents, Parameters, Data, Matrix, Rails, Delta Stats, Delta Plot, Cur OCS, New OCS, and Summary. The main content area is divided into several sections:

- Header:** Cycle: 2015, Version: PR 02. A red banner contains the title 'Compensation Management Spreadsheet'.
- Introduction:** *The purpose of this spreadsheet is to record appraisal scores and set basic pay rates and contribution-based financial awards.*
- Left Column (Yellow Highlighted):**
 - Data/Spreadsheet Download** -- Download the data file from the CAS²Net, then click on Import to load the file into this spreadsheet.
 - Appraisal Score Entry** -- Once the file has been loaded, assign categorical and final scores for each factor, and view reports and graphs.
 - Score Normalization** -- Compare score distributions to look for any and scale differences. Run preliminary pay adjustment scenarios and CA parameters and assign pay outs to employees.
 - Data Maintenance** -- All additions, deletions, and modifications made in the central database. All columns except for data entry and "card" are locked. To preserve your work, export the data from this spreadsheet and upload to CAS²Net before changing any information in CAS²Net.
 - Final "G" Setting** -- This spreadsheet comes with a best estimate. Once you have been notified that "G" is set, make a final round trip to CAS²Net. The final "G" value and related parameters will be included in the download of your payroll data.
 - Final Compensation Setting** -- After the final round trip to update "G", finalize the pay adjustments and awards for your pay pool.
 - Data Upload** -- Use Export to create a file for uploading the results from your pay pool to CAS²Net.
 - Generate Part 1's** -- First use the filters to select employees; sort data by preferred order; then click on the Generate Part 1 to generate Part 1 of the Appraisal Form for each selected employee.
- Right Column:**
 - Pay Pool Data:** Includes links for [Import](#), [View](#), and [Export](#). It also shows 'Last Import: 8/19/2015 (2:16:59 PM)(CDT)', 'Last Export:', and 'Last Modified:' with a 'Use Today' button.
 - Parameters:** Includes a link for [Parameters](#).
 - Other Links:** [Employees ranked by Final Score](#), [Delta OCS](#), [Distribution of Delta OCS](#), [Customizable Summary](#), [Scatter-plots of OCS Score by Salary](#), [Current Pay & 2015 SPL](#), [New Pay & 2016 SPL](#), [Part 1 of Appraisal Forms](#), [Open Existing Evaluation](#), [Validate Data](#), and [Generate Part 1 of Appraisal Forms](#).

An 'Import' dialog box is overlaid in the center, displaying the message 'Import Complete!' with 'Save' and 'OK' buttons.

Using the Sub Pay Pool Spreadsheet For a Sub Pay Pool

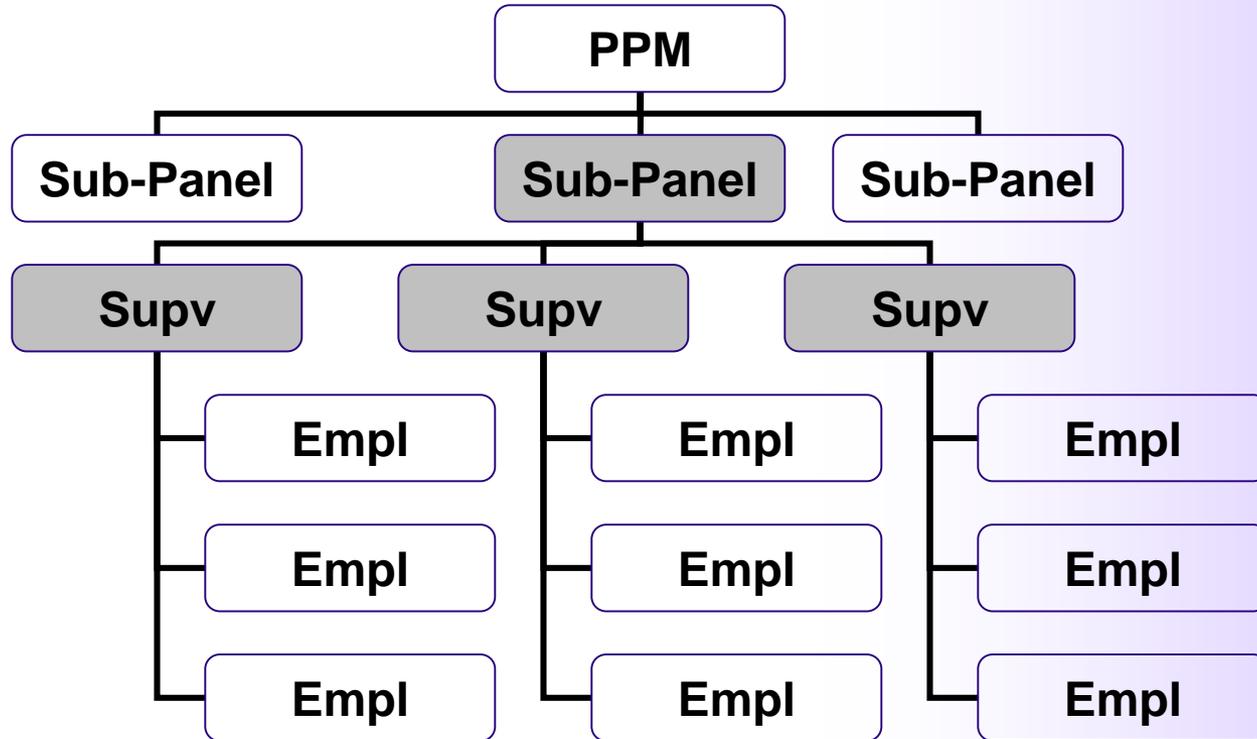
- On-line with CAS2Net
 - Must have done part IIs on line
 - Sub-panel module facilitates the leveling process
- Off-line, sub-panel spreadsheet support
 - Download the spreadsheet from CAS2Net
 - Download a data file from CAS2Net
 - Import the data file into the spreadsheet
 - Use file naming convention to identify the correct file

Note: the Sub Panel spreadsheet offers a “rack and stack” capability through the “Group into Categories” link of the “Contents” tab

- By the end of October all AcqDemo employees should have completed their self-assessments and all supervisors should have completed Part II of the Appraisal Form containing category scores on each of the six factors, along with supporting narrative comments for each employee
- By early to mid-November second-level supervisors should conduct sub-panel meetings, if applicable. This can be accomplished either using the online assessment module in CAS2Net or offline, using the sub-panel spreadsheet
- First-level supervisors usually participate in the sub-panel meetings

- You are ready for your sub-panel meeting if:
 - The CAS2Net database reflects the status of your pay pool on 30 Sept 2016
 - All employees have completed their Part IIIs
 - All first-level supervisors have completed their Part IIs (on or off line)
- Even if the Part IIs were done on-line, supervisors should take paper copies to the sub-panel meeting
 - Other documentation on employee contributions should also be taken to the meeting (e.g., letters of appreciation, awards, commendations, publications)

- Save your spreadsheet as an .xlsm file



- The meeting is held as soon as all employees have received category scores on all six factors from their first level supervisor, usually early November
- The purpose of the meeting is to normalize recommended category scores across supervisors and assign integer scores
- Note: Pay adjustments are not discussed at a sub-panel meeting

Data Tab Has Section for Ratings

A	B	C	D	E	V	W	X	Y	Z	AA	AB	AC	AD	AE	AF	AG	AH
Return to Main Menu Goto Scores Blue arrows indicate fields set to filter the data.					Set Scores												
Last Name	First Name	Middle Initial	Suffix	CAS2Net ID	Categorical Scores						Final Scores						
					prb solving	team wk	cust rftns	leadership	comm	rsrc mgmt	prb solving	team wk	cust rftns	leadership	comm	rsrc mgmt	
Burns	Barry			1843	1H	1H	1H	1H	1H	1H	27	27	27	27	27	27	
Michelson	Nancy			1472	3M	3M	3M	3M	3M	3M	78	78	78	78	78	78	
Harris	Henry			26	2MH	2MH	2MH	2MH	2MH	2MH	59	59	59	59	59	59	
Tarman	Timothy			37	3M	3M	3M	3M	3M	3M	78	78	78	78	78	78	
Curtiss	Dan			4	4M	4M	4M	4M	4M	4M	86	86	86	86	86	86	
Hansen	Ike			18	4L	4L	4L	4L	4L	4L							
Martinez	Mary			31	3M	3M	3M	3M	3M	3M	68	68	68	68	68	68	
Artis	Amy			19	2MH	2MH	2MH	2MH	2MH	2MH	56	56	56	56	56	56	
Sorenson	Sarah			36	3M	3M	3M	3M	3M	3M	73	73	73	73	73	73	
Zurbriggen	Zack			42	2H	2H	2H	2H	2H	2H	62	62	62	62	62	62	
Quarles	Richard			11	3L	3L	3L	3L	3L	3L	66	66	66	66	66	66	
Stewart	Tammy			12	3M	3M	3M	3M	3M	3M	72	72	72	72	72	72	
Evans	Erin			23	3M	3M	3M	3M	3M	3M							
Nance	Nolan			32													
Yeakley	Yolanda			41	4L	4L	4L	4L	4L	4L	83	83	83	83	83	83	
Emerson	Erica			47													
O'Connor	Olive			33	4M	4M	4M	4M	4M	4M	68	68	68	68	68	68	
Arndt	Aaron			43													
Irinski	Ivan			27	3M	3M	3M	3M	3M	3M	51	51	51	51	51	51	
Donaldson	Dennis			22	2M	2M	2M	2M	2M	2M	37	37	37	37	37	37	

NH – Problem Solving

<u>2H</u>	<u>3L</u>	<u>3M</u>	<u>3H</u>	<u>4L</u>
Jane Doe(3) 65 Harry Smith(2) 63	Bill Davis(3) 66 Sally Brown(3) 64 John Jones(3) 62	Mary Cox(3) 70	Jeff Green(4) 82 Fred Cantu(3) 80	Ruth Lopez(4) 83 Dan Jones (3) 79

For each career path, factor, and level

1. The Group into Categories User Form puts each employee in the contribution matrix based on the first-level supervisor's recommendation
 - Number in parentheses is broadband level
 - Second number is OCS for the factor
2. By discussing and comparing contributions, move employees between categories
3. Rank order employees within each category
4. Assign integer scores

This is called "normalizing" or "leveling" scores

Sub-Panel Meeting Spreadsheet

Cycle: 2015

Version: PR 01

The purpose of this spreadsheet is to assign preliminary and final contribution scores to employees.

Data/Spreadsheet Download -- Download the offline managers meeting data file from CAS2Net and save it to your hard drive, then click on Import to load the file into this spreadsheet.

Appraisal Score Entry -- Once the file has been loaded, click *View* to go directly to the Data tab to enter preliminary and final scores. To assign scores using an interface that is similar to the on-line Managers Meeting, click the *Group into Categories* link. This form filters employees by Career Path, Factor, and Score Level. For each score level (1 through 4) selected there will be between four and seven list boxes representing the available preliminary scores for that level plus boxes representing the upper and lower limits of the preceding and next levels, respectively. Employees without a preliminary score will show up in the *Unrated* listbox. Employees can be moved around in listboxes (left, right, up and down) and to/from the *Unrated* listbox using the buttons on the form. To assign a final score, double-click the employee's name.

Data Maintenance -- All additions, deletions, and modifications must be done in CAS2Net. All columns except for data entry and "wild-card" are locked. To preserve your work, export the data from this spreadsheet and upload to CAS2Net before changing any information in the database.

Data Upload -- Use Export to create a file for uploading the results from your pay pool to CAS2Net.

Paypool Data

[Import](#)

[View](#)

[Export](#)

Last Import: 8/19/2015 (1:07:56 PM)(CDT)

Last Export:

Last Modified:

Scores

[Group into Categories](#)

Click here

Summary Reports

[Rails Report](#)

[Career Path Factor Matrices ranked by Final Score](#)

[Summary Statistics of Delta OCS](#)

[Distribution of Delta OCS](#)

Scatter-plots of OCS Score by Salary

[Current Pay & 2015 SPL](#)

Career Path

NH NJ NK

Level

1

2

3

4

Employee Movement

Up

LeftRight

Down

Move to Unrated

Move from Unrated

Unrated

2H (62 - 66)

Zurbruggen Zack (2)	62
---------------------	----

3L (61 - 66)

Quarles Richard (3)	66
---------------------	----

3M (67 - 78)

Michelson Nancy (4)	78
Tarman Timothy (3)	78
Sorenson Sarah (3)	73
Stewart Tammy (3)	72
Martinez Mary (3)	68
Evans Erin (3)	

The screenshot shows a software interface for managing employee categories. On the left, there are controls for Career Path (NH, NJ, NK), Factor (Problem Solving, Teamwork, Customer Relations, Leadership, Communications, Resource Management), and Level (1, 2, 3, 4). The Level 3 option is selected. In the 'Employee Movement' section, the 'Left' button is circled in red. Below this are buttons for 'Up', 'Down', 'Right', 'Move to Unrated', and 'Move from Unrated'. An 'Unrated' box is also present. At the bottom, a table lists employees grouped by level:

2H (62 - 66)	3L (61 - 66)	3M (67 - 78)
Zurbruggen Zack (2) 62	Quarles Richard (3) 66	Michelson Nancy (4) 78
		Tarman Timothy (3) 78
		Sorenson Sarah (3) 73
		Stewart Tammy (3) 72
		Martinez Mary (3) 68
		Evans Erin (3) 67

The 'Evans Erin (3) 67' row in the 3M column is highlighted in blue and circled in red.

Based on panel discussion, select employee to move into category; in this example, panel wants to move “Erin Evans” to 3L; to do so, click on Erin Evans and then “Left”

- Erin has moved to 3L and has lost her integer score because it does not apply to 3L

The screenshot shows an HR system interface with the following components:

- Career Path:** Radio buttons for NH (selected), NJ, and NK.
- Factor:** Radio buttons for Problem Solving (selected), Teamwork, Customer Relations, Leadership, Communications, and Resource Management.
- Level:** Radio buttons for 1, 2, 3 (selected), and 4.
- Employee Movement:** Buttons for Up, Down, Left (highlighted with a red box), and Right. Below these are buttons for 'Move to Unrated' and 'Move from Unrated'.
- Unrated:** An empty rectangular box.
- Employee List:** A table with three columns representing levels: 2H (62 - 66), 3L (61 - 66), and 3M (67 - 78).

2H (62 - 66)	3L (61 - 66)	3M (67 - 78)	Score
Zurbriggen Zack (2)	Evans Erin (3)	Michelson Nancy (4)	78
	Quaries Richard (3)	Tarman Timothy (3)	78
		Sorenson Sarah (3)	73
		Stewart Tammy (3)	72
		Martinez Mary (3)	68

Career Path

NH NJ NK

Level

1
 2
 3
 4

Apply

Close

Employee Movement

Up

Left
Right

Down

Move to Unrated

Move from Unrated

Unrated

2H (62 - 66)	3L (61 - 66)	3M (67 - 71)
	Garfield George (3) Grimes Garth (3) Harris Henry (2)	

- For each factor, use “Up” or “Down” buttons to move employees within a category to an appropriate order, as directed by panel discussion
- You can group by Pay Schedule, Broadband rating level, and Factor

Group into Categories

Career Path
 NH NJ NK

Factor
 Problem Solving
 Teamwork
 Customer Relations
 Leadership
 Communications
 Resource Management

Level
 1
 2
 3
 4

Employee Movement
Up
Left Right
Down
Move to Unrated
Move from Unrated

Unrated

2H (62 - 66) 3L (61 - 66) 3M (67 - 78) 3

Garfield George (3)
Grimes Garth (3)
Harris Henry (2)

Assign Integer Score

Name: Garfield George (3)
Category: Problem Solving
Pre-Score: 3L
Final Score: |
Apply Cancel

■ To assign a score, double click on employee's name

■ Select a score from the drop down list of the "Assign Integer Score" interface

Display of Integer Score

Group into Categories

Career Path
 NH NJ NK

Factor
 Problem Solving
 Teamwork
 Customer Relations
 Leadership
 Communications
 Resource Management

Level
 1
 2
 3
 4

Employee Movement
 Up
 Left Right
 Down

Unrated

Apply
 Close
 Move to Unrated
 Move from Unrated

2H (62 - 66)	3L (61 - 66)	3M (67 - 72)
	Garfield George (3) 63	
	Grimes Garth (3) 62	
	Harris Henry (2) 64	

George has an integer score of 63

Note that the preliminary and numerical score changes show up in the data tab when the Apply Button is pressed

[Return to Main Menu](#)

[Return to Data](#)

Factor Matrix

[All](#) [NH](#) [NJ](#) [NK](#)

Each list gives the name and integer score on the factor. Use the buttons to rank order the lists by integer score.

Rank Order
Lowest to Highest

Rank Order
Highest to Lowest

Rank Order
Lowest to Highest
by Broadband

Rank Order
Highest to Lowest
by Broadband

All Career Paths

2013 OCS			
NK	Freeman	Francis	2 46
NK	Donaldson	Dennis	2 5
NK	Irinski	Ivan	3 51
NK	Karnes	Keith	2 31
NK	Williams	Wilson	2 43
NK	Arndt	Aaron	2 36
NK	Dancy	Dyanne	1 12
NJ	Garfield	George	4 77
NJ	Yatey	Zane	4 78
NJ	O'Connor	Olive	4 69
NJ	Parsons	Patricia	3 60
NJ	Rhone	Ronald	3 46
NJ	Hoang	Andrew	1 12
NJ	Hoang	Eric	1 12
NH	Burns	Barry	2 30
NH	Michelson	Nancy	4 80
NH	Curtiss	Dan	4 86
NH	Evans	Francis	4 89
NH	Gonzalez	Helen	4 85
NH	Iverson	John	4 84
NH	Quarles	Richard	3 67
NH	Stewart	Tammy	3 73
NH	Udell	Vincent	3 68
NH	Babbitt	Chris	3 63
NH	Fites	George	3 62
NH	Hansen	Ike	3 83
NH	Artis	Amy	2 58
NH	Celon	Connie	3 70
NH	Evans	Erin	3 75
NH	Farnsworth	Fred	2 54
NH	Grimes	Garth	2 32
NH	Harris	Henry	2 60
NH	Jerris	Jane	3 66
NH	Lawrence	Lance	3 62

NH Career Path

prb solving				team wk			
Burns	Barry	2	30	Burns	Barry	2	30
Michelson	Nancy	4	80	Michelson	Nancy	4	80
Curtiss	Dan	4	86	Curtiss	Dan	4	86
Evans	Francis	4	89	Evans	Francis	4	89
Gonzalez	Helen	4	85	Gonzalez	Helen	4	85
Iverson	John	4	84	Iverson	John	4	84
Quarles	Richard	3	67	Quarles	Richard	3	67
Stewart	Tammy	3	73	Stewart	Tammy	3	73
Udell	Vincent	3	68	Udell	Vincent	3	68
Babbitt	Chris	3	63	Babbitt	Chris	3	63
Fites	George	3	62	Fites	George	3	62
Hansen	Ike	3	83	Hansen	Ike	3	83
Artis	Amy	2	58	Artis	Amy	2	58
Celon	Connie	3	70	Celon	Connie	3	70
Evans	Erin	3	75	Evans	Erin	3	75
Farnsworth	Fred	2	54	Farnsworth	Fred	2	54
Grimes	Garth	2	32	Grimes	Garth	2	32
Harris	Henry	2	60	Harris	Henry	2	60
Jerris	Jane	3	66	Jerris	Jane	3	66
Lawrence	Lance	3	62	Lawrence	Lance	3	62
Martinez	Mary	3	69	Martinez	Mary	3	69
Nance	Nolan	3		Nance	Nolan	3	
Sorenson	Sarah	3	75	Sorenson	Sarah	3	75
Tarman	Timothy	3	79	Tarman	Timothy	3	79
Ulanov	Uli	2	42	Ulanov	Uli	2	42
Vinson	Violet	3	74	Vinson	Violet	3	74
Yeakley	Yolanda	3	82	Yeakley	Yolanda	3	82
Zurbrigg	Zack	2	68	Zurbrigg	Zack	2	68
Butler	Bryce	4	83	Butler	Bryce	4	83
Cavasos	Carmen	2	63	Cavasos	Carmen	2	63
Emerson	Erica	2		Emerson	Erica	2	
Mucker	Mark	3	76	Mucker	Mark	3	76
Hoang	Danielle	3	65	Hoang	Danielle	3	65
Appleton	Adam	3	65	Appleton	Adam	3	65

- Use the "Matrix" worksheet to compare score distributions by Career Path and Broadband
- Review score distribution by Factor by Career Path

[Return to Main Menu](#)

Rails Report

Final

Rail Zone	NH		NJ		NK		Total	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
A	0	0.0%	0	N/A	0	0.0%	0	0.0%
C1	1	16.7%	0	N/A	1	100.0%	2	28.6%
C2	5	83.3%	0	N/A	0	0.0%	5	71.4%
B	0	0.0%	0	N/A	0	0.0%	0	0.0%
Total	6	100.0%	0	N/A	1	100.0%	7	100.0%

Definition of Rail Zone

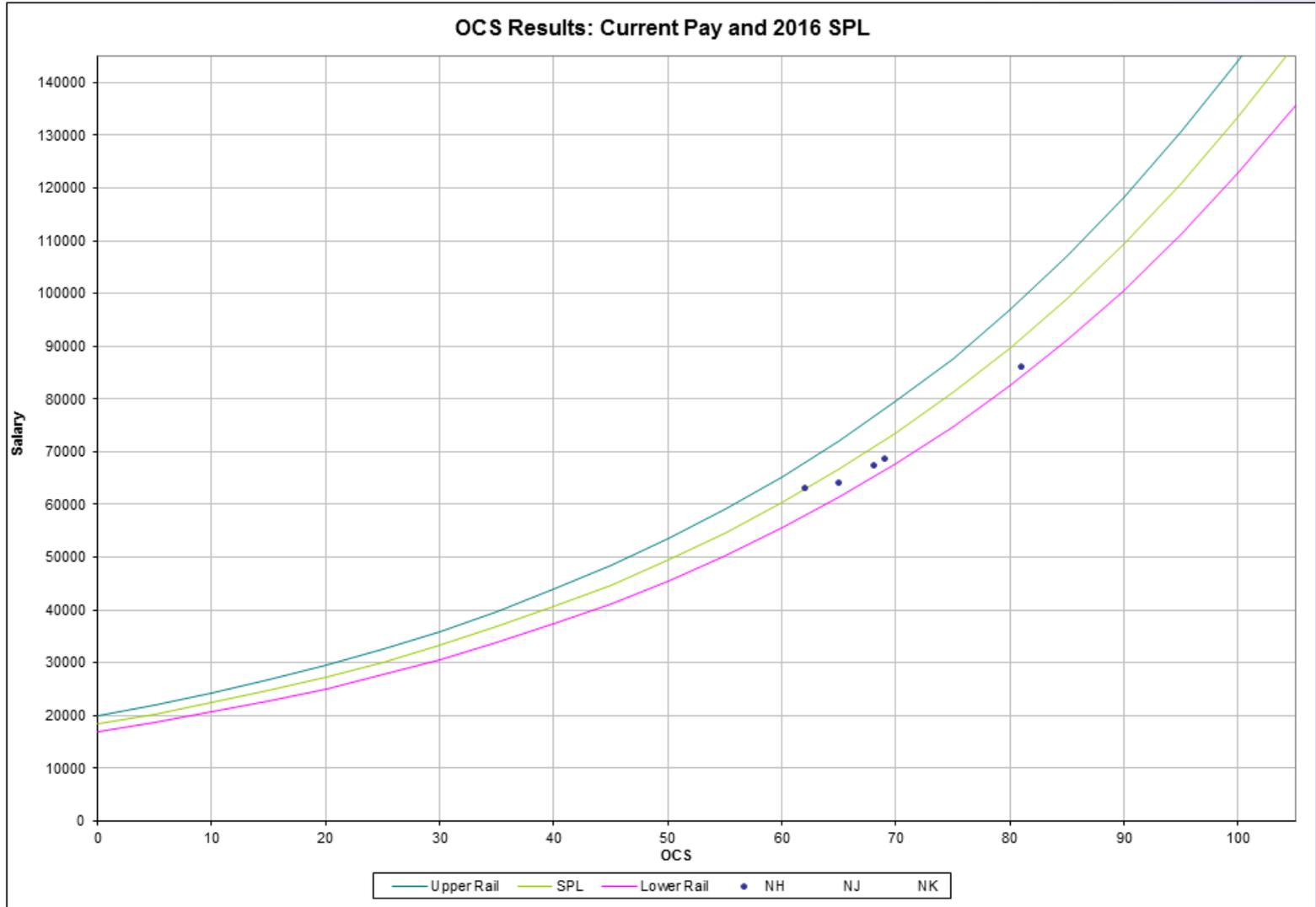
- Inappropriately compensated above the rails
- Appropriately compensated between the rails > SPL
- Appropriately compensated between the rails <= SPL
- Inappropriately compensated below the rails

Upper and Lower Rails

	GS-1 Step 1	SPL base		CCS	Upper Rail	Lower Rail	SPL
2015	\$18,161	1.0200427	min	1.00	\$20,007	\$17,043	\$18,525
			max	115.00	\$192,165	\$163,696	\$177,930

Contents Data Matrix **Rails** Delta Stats Delta Plot Cur OCS

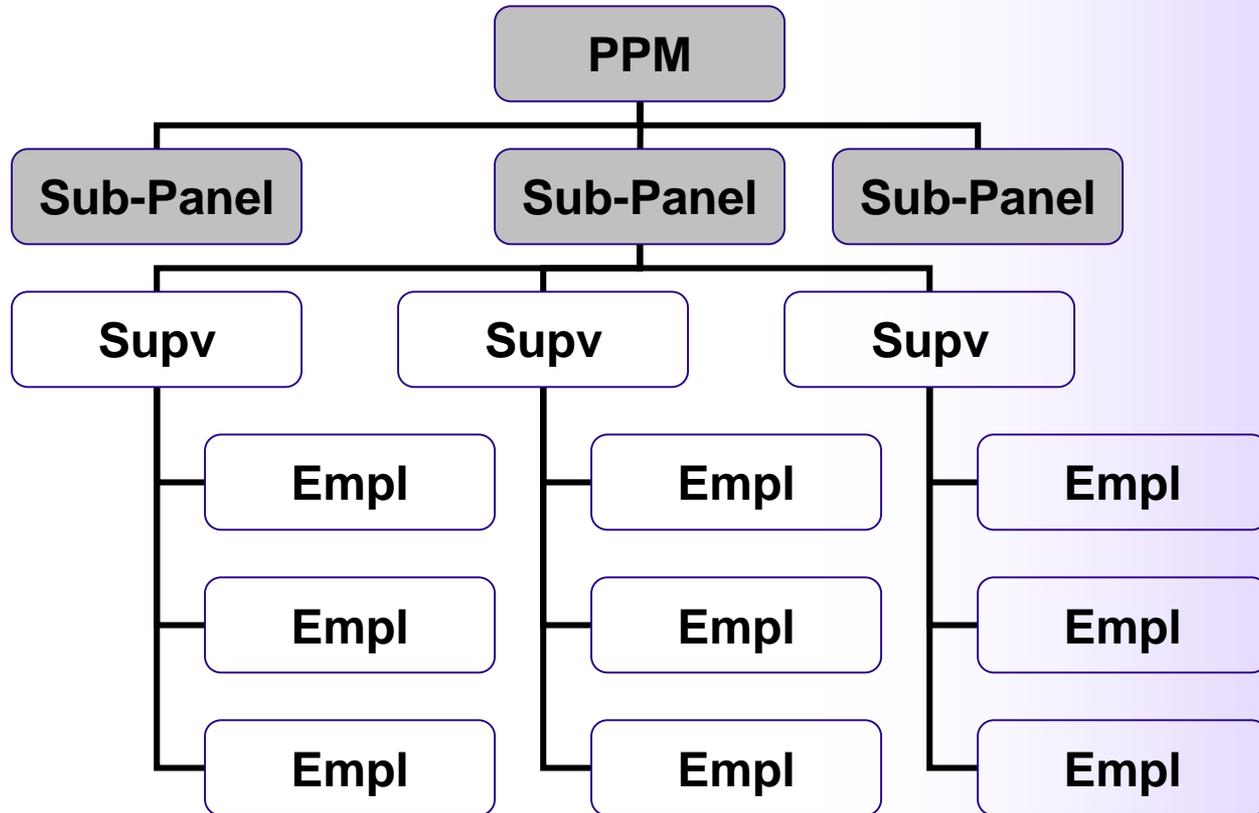
- Calculates how employees' scores (as a Count and a Percent) map to the different rail zones (A, C1, C2, B)
 - C1 is above the SPL and on or below the upper rail
 - C2 is on or below the SPL and on or above the lower rail
- Shows Rail Zone Table



- Graph on previous slide is used to visualize overall plot of current pay vs OCS

- Open up Sub-Panel spreadsheet and import file
- Use Group-Into Categories user form to complete ratings for all employees and hit apply when done
- Check results on Data and in the other tabs

Using the CMS Spreadsheet for a Pay Pool



- The meeting is held as soon as all sub-panel meeting are over, usually early December
- The purpose of the meeting is to review and normalize scores across sub-panels and assist the PPM with pay adjustments and awards

Conducting a Pay Pool Panel Meeting

- Meeting must be done off-line, there are no on-line support tools; computations are done in the CMS only
- Download the CMS spreadsheet from CAS2Net
- Download the entire pay pool data file from CAS2Net
- Import the data file into the CMS Spreadsheet
- Importing a Pay Pool data file is the same as importing a Sub-Panel data file; remember the file naming convention to help you select the correct file

Parameter Setting for First Year

- First year pay pools should check the first cycle box and set CRI funding to 2.4% and CA funding to 1.3% (note that only 90% of the CA funding is available in the CMS)
- Note additional targets (Beta 2) for CA
- Note that CA funding is open without needing to check a "use awards" box

Return to Main Menu Reset to Default Values

Return to Data

You may set any parameters in Yellow

Scenario Summary

Start with little or no CRI and CA set-aside and increase it gradually. If you reduce the set-aside after allocating your discretionary funds, your remainder will go negative and you will have to delete all or some of your allocations and start over again. Set aside may change if rollover amount changes. The cash award amount is 90% of the total award budget.

GPI (G)%	1.00		
GS-1/step1 pay (17)	\$ 18,526		
GS-1/step1 pay (16)	\$ 18,343	Cash Amount Plus Unused GPI	
CRI%	2.400000%	\$65,843	\$65,843
CRI Set-Aside <input type="radio"/> % <input checked="" type="radio"/> \$	0.000000%	\$0	<input checked="" type="checkbox"/> Check box if this is your organization's first cycle in AcqDemo
Award%	1.300000%	\$40,366	
Award Set-Aside <input type="radio"/> % <input checked="" type="radio"/> \$	0.000000%	\$0	

Beta 1	
1= Upper Rail	
0= SPL	
-1= Lower Rail	

Beta 2	
1= Upper Rail	
2% = 2% above SPL	
1% = 1% above SPL	
0= SPL	
-1= Lower Rail	

Use Control Points

Beta 1 (CRI)	0		
Beta 2 (Award)	1		
Minimum CRI Dollar Amount	\$0		
Minimum CRI Carryover Amt	\$0		
Minimum Award Dollar	\$0		

GPI (G) Carry Over	\$ -		
CRI Remainder	\$ 13		
Award Remainder	\$ 18		
Alpha 1	0.8345		
Alpha 2	0.1392		
Minimum CRI Budget %	2.0		
Minimum Award Budget %	1.000000		

	Award Funding	CCAS Award	
Funding Amount	\$44,852	Spending	Balance
90% of Award Funding	\$40,366	\$40,348	\$18

OPM .96% limit	\$33,121	\$0	Award Spending exceeds OPM 0.96% limit so no addition funds available outside the CMS amount that can be spent outside CMS to meet pay pool limit
Pay pool 1.300% limit	\$44,852	\$4,504	

Contents Parameters Data Matrix Rails Delta Stats Delta Plot Cur OCS New OCS Summary

Data Tab: Ratings

	A	B	C	D	E	AC	AD	AE	AF	AG	AH	AI	AJ	AK	AL	AM	AN	AO	
1	Return to	Edit				Set Scores													
2	Main Menu	Parameters																	
3																			
4	Goto																		
5	Scores	GPI																	
6	CRI Awards																		
7	Blue arrows indicate fields set to filter the data.																		
8								Categorical Scores					Final Scores						
	Last Name	First Name	Middle Initial	Suffix	CAS2Net ID		prb solving	team wk	cust rftns	leadership	comm	rsrc mgmt	prb solving	team wk	cust rftns	leadership	comm	rsrc mgmt	
9																			
10																			
11	Artis	Amy			19		2H	3M	3M	2H	3M	2H	65	67	73	66	74	66	
12	Babbitt	Chris			15		3H	3H	3H	3M	3M	3H	81	79	80	74	78	83	
13	Burns	Barry			1843		2M	2ML	2ML	2M	2M	2ML	47	40	40	45	42	40	
14	Butler	Bryce			44		3H	3H	3H	4M	3H	3H	79	79	79	84	81	82	
15	Cavasos	Carmen			45		2MH	2MH	2MH	2MH	2MH	2MH	54	57	60	61	54	54	
16	Celon	Connie			21														
17	Curtiss	Dan			4		4M	4M	4M	4M	4M	4M	85	85	95	92	85	85	
18	Emerson	Erica			47														
19	Evans	Erin			23		3M	3L	3M	3M	3L	3L	67	61	67	68	61	64	

Data Tab: GPI

Note that Nancy Michelson plots in Zone A, but can be given discretionary GPI

B39		George																
	A	B	C	D	E	BY	BZ	CA	CB	CC	CD	CE	CF	CG	CH			
1	Return to Main Menu	Edit Parameters																
2														Set GPI				
3														1.0%				
4														Goto				
5														Scores GPI	Total G Pot= \$27,255	Total GS = \$26,201		
6														CRI Awards				
7														Blue arrows indicate fields set to filter the data.				
8								Max Discretionary G		(PPM Input) Discretionary G								
	Last Name	First Name	Middle Initial	Suffix	CAS2Net ID	G Pot	Mandatory G%	Amount	Percent	Amount	Percent	GS	Wildcard 4	Pay with GPI				
9																		
10																		
11	Artis	Amy			19	\$669	1.00%	\$0	0.00%	\$0	0.00%	\$669		\$67,493				
12	Babbitt	Chris			15	\$846	1.00%	\$0	0.00%	\$0	0.00%	\$846		\$85,377				
13	Burns	Barry			1843	\$404	1.00%	\$0	0.00%	\$0	0.00%	\$404		\$40,761				
14	Butler	Bryce			44	\$923	1.00%	\$0	0.00%	\$0	0.00%	\$923		\$93,205				
15	Cavasos	Carmen			45	\$531	1.00%	\$0	0.00%	\$0	0.00%	\$531		\$53,628				
16	Celon	Connie			21	\$737	1.00%	\$0	0.00%	\$0	0.00%	\$737		\$74,361				
17	Curtiss	Dan			4	\$992	1.00%	\$0	0.00%	\$0	0.00%	\$992		\$100,138				
18	Emerson	Erica			47	\$593	1.00%	\$0	0.00%	\$0	0.00%	\$593		\$59,840				
19	Evans	Erin			23	\$649	1.00%	\$0	0.00%	\$0	0.00%	\$649		\$65,501				
20	Evans	Francis			5	\$917	1.00%	\$0	0.00%	\$0	0.00%	\$917		\$92,536				
21	Farnsworth	Fred			24	\$460	1.00%	\$0	0.00%	\$0	0.00%	\$460		\$46,414				
22	Fites	George			17	\$892	1.00%	\$0	0.00%	\$0	0.00%	\$892		\$90,057				
23	Gonzalez	Helen			6	\$926	1.00%	\$0	0.00%	\$0	0.00%	\$926		\$93,491				
24	Grimes	Garth			25	\$316	1.00%	\$0	0.00%	\$0	0.00%	\$316		\$31,882				
25	Hansen	Ike			18	\$720	1.00%	\$0	0.00%	\$0	0.00%	\$720		\$72,648				
26	Iverson	John			7	\$1,316	1.00%	\$0	0.00%	\$0	0.00%	\$1,316		\$132,839				
27	Jerris	Jane			28	\$954	0.99%	\$0	0.00%	\$0	0.00%	\$954		\$96,958				
28	Lawrence	Lance			30	\$685	1.00%	\$0	0.00%	\$0	0.00%	\$685		\$69,133				
29	Martinez	Mary			31	\$885	1.00%	\$0	0.00%	\$0	0.00%	\$885		\$89,349				
30	Michelson	Nancy			1472	\$1,054		\$1,054	1.00%	\$0	0.00%	\$0		\$105,331				
31	Nance	Nolan			32	\$671	1.00%	\$0	0.00%	\$0	0.00%	\$671		\$67,706				

Data Tab: CRI and Control Points

	A	B	C	D	E	CI	CJ	CK	CL	CM	CN	CO	CP	CQ	CR	CS	CT	CU	CV	CW	CX
1	Return to Main Menu		Edit Parameters			Set CRI 2.40%		Total CRI	G carry-over= \$1,054.00												
2							Default=	\$66,880	CRI Budget =	\$66,897.00											
3							Discretionary=	\$0	CRI Set Aside =	\$0.00											
4							Computed =	\$66,880	Alpha1=	0.847837											
5	Goto																	Total New Base Pay =	\$2,845,788		
6	Scores GPI																	Total Approved CRI =	\$56,610		
7	CRI Awards																				
8	Blue arrows indicate fields set to filter the data.					Available Balance=	\$17.00														
9	Last Name	First Name	Middle Initial	Suffix	CAS2Net ID	(Default CRI) Alpha1DeltaY	(PPM Input) Discretionary CRI	Computed CRI \$	Computed CRI %	Computed Base Pay 2017	Max Allowable CRI %	Allow to exceed 20% limit	CY2017 UR Pay	CY2017 LR Pay	Control Point	Allow Over Control Point?	Max Base Pay 2017	Approved CRI \$	New Base Pay 2017	WildCard 5	
10																					
11	Artis	Amy			19	\$4,500	\$0	\$4,500	6.73%	\$71,993	6.00%	0	\$78,681	\$67,024	\$68,000	0	\$68,000	\$507	\$68,000		
12	Babbitt	Chris			15	\$2,912	\$0	\$2,912	3.44%	\$88,289	6.00%	0	\$95,952	\$81,736	0	0	\$90,449	\$2,912	\$88,289		
13	Burns	Barry			1843	\$1,572	\$0	\$1,572	3.90%	\$42,333	6.00%	0	\$46,044	\$39,223	0	0	\$43,182	\$1,572	\$42,333		
14	Butler	Bryce			44	\$0	\$0	\$0	0.00%	\$93,205	6.00%	0	\$99,836	\$85,046	0	0	\$96,958	\$0	\$93,205		
15	Cavasos	Carmen			45	\$3,179	\$0	\$3,179	5.99%	\$56,807	6.00%	0	\$62,008	\$52,822	0	0	\$56,814	\$3,179	\$56,807		
16	Celon	Connie			21	\$0	\$0	\$0	0.00%	\$74,361	0.00%	0	\$80,258	\$68,368	0	0	\$74,361	\$0	\$74,361		
17	Curtiss	Dan			4	\$5,104	\$0	\$5,104	5.15%	\$105,242	6.00%	0	\$114,714	\$97,719	0	0	\$106,087	\$5,104	\$105,242		
18	Emerson	Erica			47	\$0	\$0	\$0	0.00%	\$59,840	6.00%	0	\$64,519	\$54,960	0	0	\$63,395	\$0	\$59,840		
19	Evans	Erin			23	\$1,505	\$0	\$1,505	2.32%	\$67,006	6.00%	0	\$72,677	\$61,910	0	0	\$69,392	\$1,505	\$67,006		
20	Evans	Francis			5	\$0	\$0	\$0	0.00%	\$92,536	6.00%	0	\$99,836	\$85,046	0	0	\$98,033	\$0	\$92,536		
21	Farnsworth	Fred			24	\$0	\$0	\$0	0.00%	\$46,414	6.00%	0	\$49,848	\$42,463	0	0	\$49,171	\$0	\$46,414		
22	Fites	George			17	\$6,762	\$0	\$6,762	7.58%	\$96,819	20.00%	0	\$105,960	\$90,263	0	0	\$95,678	\$5,621	\$95,678		
23	Gonzalez	Helen			6	\$5,530	\$0	\$5,530	5.97%	\$99,021	6.00%	0	\$108,084	\$92,072	0	0	\$99,045	\$5,530	\$99,021		
24	Grimes	Garth			25	\$344	\$0	\$344	1.09%	\$32,226	6.00%	0	\$34,875	\$29,709	0	0	\$33,776	\$344	\$32,226		
25	Hansen	Ike			18	\$3,924	\$0	\$3,924	5.46%	\$76,572	6.00%	0	\$83,507	\$71,136	0	0	\$76,964	\$3,924	\$76,572		
26	Iverson	John			7	\$0	\$0	\$0	0.00%	\$132,839	6.00%	0	\$142,698	\$121,558	0	0	\$134,776	\$0	\$132,839		

Data Tab: Locality Pay

Locality Pay is not affected by AcqDemo, but is computed to be able to include it on the Part I Rating Form and Payout Summary.

	A	B	C	D	E	CY	CZ	DA	DB	DC	DD	DE	DF	
1	Return to Main Menu	Edit Parameters				Locality Pay								
2														
3														
4	Goto													
5	Scores	GPI												
6	CRI Awards													
7	Blue arrows indicate fields set to filter the data.													
8														
	Last Name	First Name	Middle Initial	Suffix	CAS2Net ID	Locality Code	Locality Rate	Initial Locality Amount	New Base Pay + Locality	Hit EXIV Cap?	Final Base Pay + Locality	Coming off Retained Pay?		
9														
10														
11	Artis	Amy			19	LA	27.65%	\$18,802	\$86,802	No	\$86,802			
12	Babbitt	Chris			15	ZZ	0.00%	\$0	\$88,289	No	\$88,289			
13	Burns	Barry			1843	LA	27.65%	\$11,705	\$54,038	No	\$54,038			
14	Butler	Bryce			44	LA	27.65%	\$25,771	\$118,976	No	\$118,976			
15	Cavasos	Carmen			45	LA	27.65%	\$15,707	\$72,514	No	\$72,514			
16	Celon	Connie			21	LA	27.65%	\$20,561	\$94,922	No	\$94,922			
17	Curtiss	Dan			4	LA	27.65%	\$29,099	\$134,341	No	\$134,341			
18	Emerson	Erica			47	LA	27.65%	\$16,546	\$76,386	No	\$76,386			
19	Evans	Erin			23	LA	27.65%	\$18,527	\$85,533	No	\$85,533			
20	Evans	Francis			5	LA	27.65%	\$25,586	\$118,122	No	\$118,122			
21	Farnsworth	Fred			24	LA	27.65%	\$12,833	\$59,247	No	\$59,247			
22	Fites	George			17	LA	27.65%	\$26,455	\$122,133	No	\$122,133			
23	Gonzalez	Helen			6	LA	27.65%	\$27,379	\$126,400	No	\$126,400			
24	Grimes	Garth			25	LA	27.65%	\$8,910	\$41,136	No	\$41,136			
25	Hansen	Ike			18	LA	27.65%	\$21,172	\$97,744	No	\$97,744			
26	Iverson	John			7	LA	27.65%	\$36,730	\$169,569	Yes	\$161,900			
27	Jerris	Jane			28	LA	27.65%	\$26,809	\$123,767	No	\$123,767			
28	Lawrence	Lance			30	LA	27.65%	\$19,115	\$88,248	No	\$88,248			
29	Martinez	Mary			31	LA	27.65%	\$25,001	\$115,422	No	\$115,422			

Data Tab: Awards

	A	B	C	D	E	DG	DH	DI	DJ	DK	DL	DM	DN	DO	DP	DQ						
1	Return to Main Menu		Edit Parameters			Set Award 1.30%	Total Carryover Award = \$10,270		<table border="1"> <tr> <td>Available Award Dollars =</td> <td>\$40,366.00</td> </tr> <tr> <td>Discretionary Set-Aside =</td> <td>\$0</td> </tr> <tr> <td>Alpha2 =</td> <td>0.141074</td> </tr> </table>								Available Award Dollars =	\$40,366.00	Discretionary Set-Aside =	\$0	Alpha2 =	0.141074
Available Award Dollars =	\$40,366.00																					
Discretionary Set-Aside =	\$0																					
Alpha2 =	0.141074																					
2							Total CA Pos Delta Y = \$286,133															
3							Total Default Award = \$40,347															
4	Goto						Total Discretionary Award = \$0															
5	Scores GPI						Total Award = \$50,617															
6	CRI Awards																					
7	Blue arrows indicate fields set to filter the data.							Remainder = \$19.00														
8	Last Name	First Name	Middle Initial	Suffix	CAS2Net ID	Carryover Award	CA Pos Delta Y	Computed Award	(PPM Input) Discretionary Award	Total Award	WildCard 6	Award > \$10K?	Appraisal Rating?	Total New Comp. Base Pay + Awd	WildCard 7							
9																						
10																						
11	Artis	Amy			19	\$3,993	\$11,079	\$1,562	\$0	\$5,555			5	\$73,555								
12	Babbitt	Chris			15	\$0	\$10,472	\$1,477	\$0	\$1,477			5	\$89,766								
13	Burns	Barry			1843	\$0	\$5,232	\$738	\$0	\$738			4	\$43,071								
14	Butler	Bryce			44	\$0	\$6,567	\$926	\$0	\$926			5	\$94,131								
15	Cavasos	Carmen			45	\$0	\$8,298	\$1,170	\$0	\$1,170			5	\$57,977								
16	Celon	Connie			21	\$0	\$0	\$0	\$0	\$0				\$74,361								
17	Curtiss	Dan			4	\$0	\$14,434	\$2,036	\$0	\$2,036			4	\$107,278								
18	Emerson	Erica			47	\$0	\$4,634	\$653	\$0	\$653			5	\$60,493								
19	Evans	Erin			23	\$0	\$7,106	\$1,002	\$0	\$1,002			3	\$68,008								
20	Evans	Francis			5	\$0	\$7,230	\$1,020	\$0	\$1,020			3	\$93,556								
21	Farnsworth	Fred			24	\$0	\$3,401	\$479	\$0	\$479			4	\$46,893								
22	Fites	George			17	\$1,141	\$15,748	\$2,221	\$0	\$3,362			5	\$99,040								
23	Gonzalez	Helen			6	\$0	\$14,451	\$2,038	\$0	\$2,038			3	\$101,059								
24	Grimes	Garth			25	\$0	\$2,965	\$418	\$0	\$418			3	\$32,644								
25	Hansen	Ike			18	\$0	\$10,754	\$1,517	\$0	\$1,517			4	\$78,089								

Data Tab: CIP Triggers and Summary

	A	B	C	D	E	DR	DS	DT	DU	DV	DW	DX	DZ	EA	EB	EC	ED	EE
1	Return to Main Menu	Edit Parameters																
2																		
3																		
4	Goto																	
5	Scores	GPI																
6	CRI Awards																	
7	Blue arrows indicate fields set to filter the data.																	
8						Appraisal Summary						Compensation Summary						
	Last Name	First Name	Middle Initial	Suffix	CAS2Net ID	CY2017 Expected OCS	CIP Trigger	Mandatory CIP	Wildcard 8	2016 Expected OCS	2016 OCS	Delta OCS	CY2016 Base Pay	G\$	Approved CRI	New Base Pay 2017	Total Award	Approved CRI + Approved Award
9																		
10																		
11	Artis	Amy			19	66	14	0		65	69	4	\$66,824	\$669	\$507	\$68,000	\$5,555	\$6,062
12	Babbitt	Chris			15	79	44	0		77	79	2	\$84,531	\$846	\$2,912	\$88,289	\$1,477	\$4,389
13	Burns	Barry			1843	42	14	0		40	42	2	\$40,357	\$404	\$1,572	\$42,333	\$738	\$2,310
14	Butler	Bryce			44	81	44	0		81	81	0	\$92,282	\$923	\$0	\$93,205	\$926	\$926
15	Cavasos	Carmen			45	56	14	0		54	57	3	\$53,097	\$531	\$3,179	\$56,807	\$1,170	\$4,349
16	Celon	Connie			21	70	44	0		70	70	0	\$73,624	\$737	\$0	\$74,361	\$0	\$0
17	Curtiss	Dan			4	88	72	0		85	88	3	\$99,146	\$992	\$5,104	\$105,242	\$2,036	\$7,140
18	Emerson	Erica			47	59	14	0		59	59	0	\$59,247	\$593	\$0	\$59,840	\$653	\$653
19	Evans	Erin			23	65	44	0		64	65	1	\$64,852	\$649	\$1,505	\$67,006	\$1,002	\$2,507
20	Evans	Francis			5	81	72	0		81	81	0	\$91,619	\$917	\$0	\$92,536	\$1,020	\$1,020
21	Farnsworth	Fred			24	46	14	0		46	46	0	\$45,954	\$460	\$0	\$46,414	\$479	\$479
22	Fites	George			17	83	44	0		80	84	4	\$89,165	\$892	\$5,621	\$95,678	\$3,362	\$8,983

Data Tab: Payout Override and Signature

A E					U	V	W	X	Y	Z	AA
Return to Main Menu Edit Parameters Goto Scores GPI CRI Awards Blue arrows indicate fields set to filter the data.					<div style="text-align: right;">Copy to Opt Sig</div>						
Last Name	First Name	Middle Initial	Suffix	CAS2Net ID	CRI Override?	CA Override?	Rollover CRI to CA?	1st Level Sup Name	Sub-Panel Managers Meeting	Pay Pool Manager Name	Part 1: Optional Signature
Artis	Amy			19	0	0	1	Nancy Michelson	Francis Evans	Bob Arnold	
Babbitt	Chris			15	0	0	1	Peter Olson	Helen Gonzalez	Bob Arnold	
Burns	Barry			1843	0	0	1	Peter Olson	Helen Gonzalez	Bob Arnold	
Butler	Bryce			44	0	0	1	Vincent Udell	John Iverson	Bob Arnold	
Cavasos	Carmen			45	0	0	1	Vincent Udell	John Iverson	Bob Arnold	
Celon	Connie			21	0	0	1	Nancy Michelson	Francis Evans	Bob Arnold	
Curtiss	Dan			4	0	0	1	Peter Olson	Helen Gonzalez	Bob Arnold	
Emerson	Erica			47	0	0	1	Vincent Udell	John Iverson	Bob Arnold	
Evans	Erin			23	0	0	1	Nancy Michelson	Francis Evans	Bob Arnold	

Pay Pool Meeting: Check Delta Stats Scores

[Return to Main Menu](#)
[View Delta OCS Distribution](#)

Delta Plot Grouping

Supervisor

Office Symbol

Wildcard Col #

Summary Statistics of Delta OCS Score

	Average Delta OCS Score	Standard Deviation	
Overall	0.79	5.80	
NH	1.35	6.21	
NJ	-2.00	7.81	
NK	0.50	1.29	
<hr/>			
NH			Total
Barry Burns	4.75	7.54	4
Bob Arnold	7.00	11.31	2
Dan CURTISS	-1.50	2.12	2
Erin Evans	0.00	N/A	1
Helena Gonzalez	-2.50	7.78	2
Jane Jerris	0.75	1.26	4
Mary Martinez	-2.50	7.78	2
NJ			
Jane Jerris	2.00	N/A	1
Mary Martinez	-4.00	9.90	2
NK			
Barry Burns	1.00	N/A	1
Dan CURTISS	-1.00	N/A	1
Erin Evans	1.00	1.41	2
Overall			
Barry Burns	4.00	6.75	5
Bob Arnold	7.00	11.31	2
Dan CURTISS	-1.33	1.53	3
Erin Evans	0.67	1.15	3
Helena Gonzalez	-2.50	7.78	2
Jane Jerris	1.00	1.22	5
Mary Martinez	-3.25	7.32	4

Look for extreme or unusual average delta OCS values by supervisor

Pay Pool Meeting: Check Rank Ordered Data

Return to Main Menu
Return to Data

Factor Matrix
All NH NJ NK

Each list gives the name and integer score on the factor. Use the buttons to rank order the lists by integer score.

Rank Order Lowest to Highest

Rank Order Highest to Lowest

Rank Order Lowest to Highest by Broadband

Rank Order Highest to Lowest by Broadband

All Career Paths

2014 OCS				
NH Olson Peter	4	100		
NH Stewart Tammy	4	99		
NH Quarles Richard	4	96		
NH Gonzalez Helena	4	94		
NH CURTISS Dan	4	90		
NH Jerris Jane	4	90		
NH O'Connor Olive	4	89		
NH Nance Nolan	3	79		
NH Martinez Mary	3	78		
NH Garfield George	3	74		
NH Udell Vincent	3	74		
NH Burns Barry	3	74		
NH Evans Erin	3	74		
NH Grimes Garth	3	74		
NH Harris Henry	2	74		
NJ Yates Zane	4	70		
NH Lawrence Lance	3	70		
NJ Rhone Ronald	3	65		
NJ Parsons Patricia	3	62		
NH Freeman Francis	2	61		
NK Irinski Ivan	3	59		
NK Donaldson Dennis	2	47		
NK Artis Amy	2	44		
NK Karnes Keith	2	44		

NH Career Path

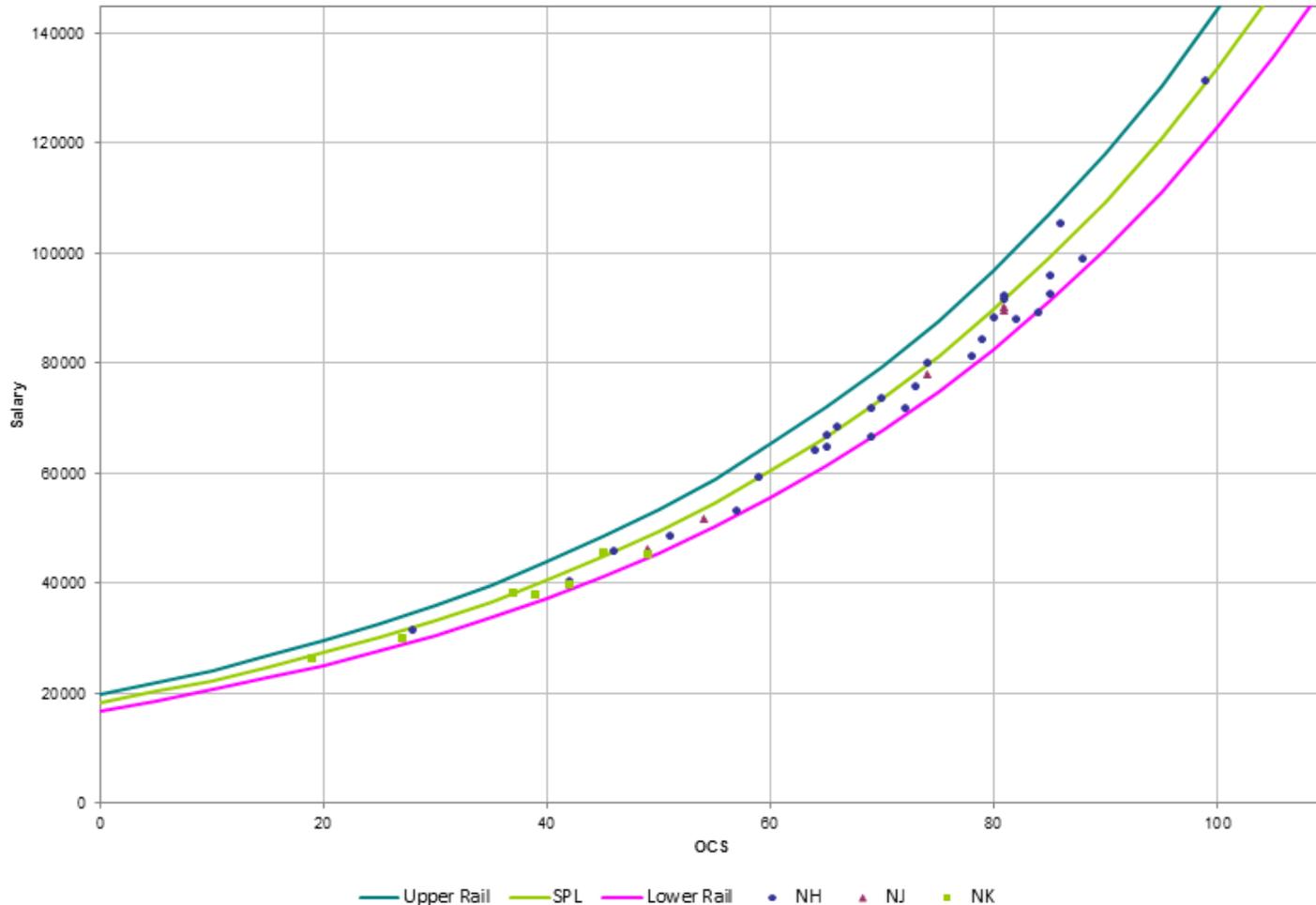
prb solving		team wk	
Lawrence Lance	3	Lawrence Lance	3
Olson Peter	4	100 Stewart Tammy	4
Stewart Tammy	4	96 Olson Peter	4
Quarles Richard	4	95 Quarles Richard	4
Gonzalez Helena	4	92 Gonzalez Helena	4
CURTISS Dan	4	90 CURTISS Dan	4
Jerris Jane	4	90 Jerris Jane	4
O'Connor Olive	4	89 O'Connor Olive	4
Martinez Mary	3	80 Nance Nolan	3
Garfield George	3	79 Martinez Mary	3
Udell Vincent	3	79 Garfield George	3
Burns Barry	3	79 Udell Vincent	3
Evans Erin	3	79 Burns Barry	3
Grimes Garth	3	79 Evans Erin	3
Harris Henry	2	79 Grimes Garth	3
Nance Nolan	3	79 Harris Henry	2
Freeman Francis	2	61 Freeman Francis	2

Contents Parameters Data **Matrix** Rails Delta Stats Delta Plot Cur OCS New OCS Summ

In the Matrix worksheet, check scores by career path and factor

Pay Pool Meeting: Check Current OCS Results

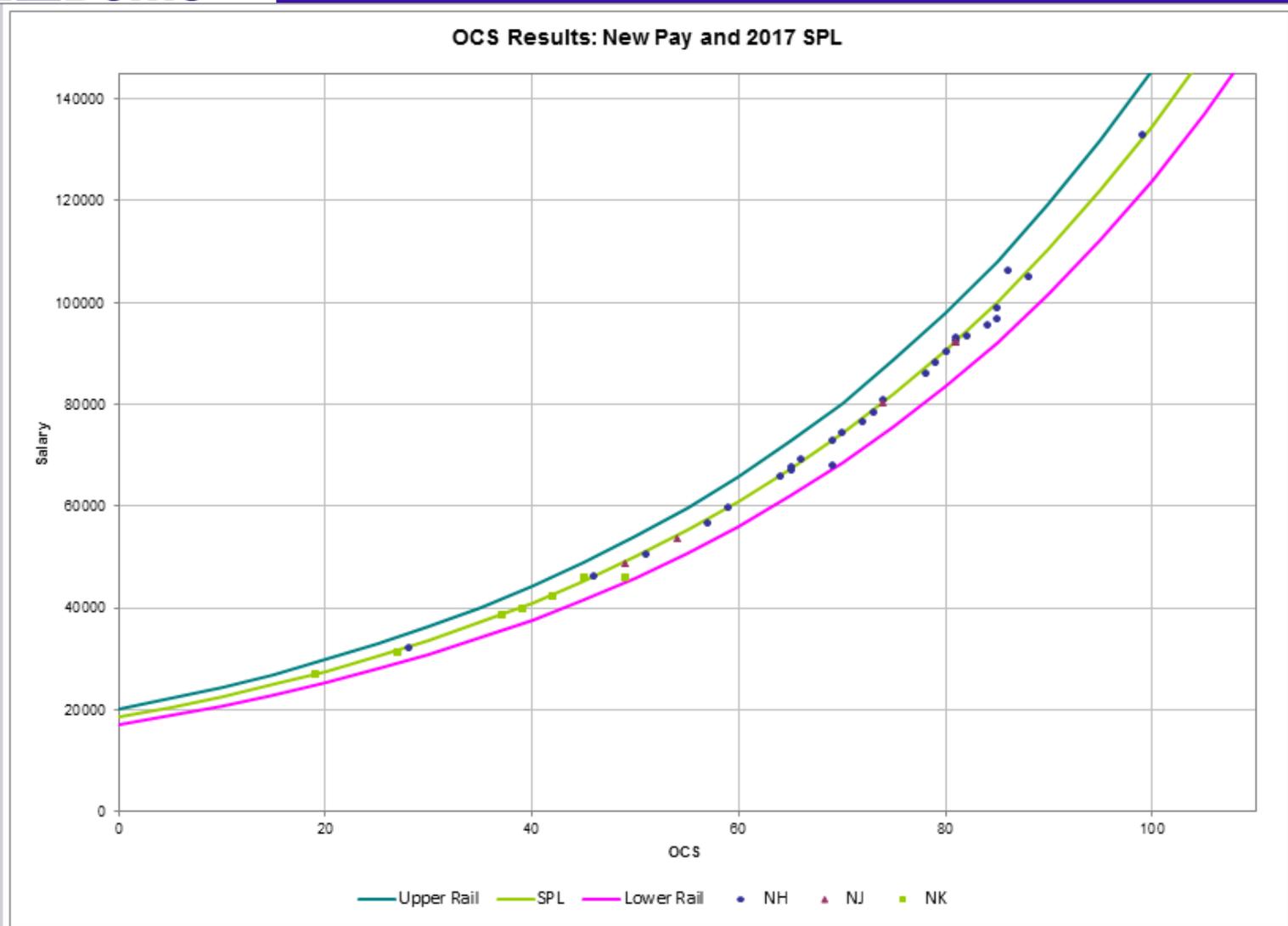
OCS Results: Current Pay and 2016 SPL



Check where overall contribution scores for current pay plot against new upper rail, lower rail and SPL

If there are fewer than 255 employees in the pay pool, hovering the mouse over the dot will display the employee's name

Plot with New Pay and Current Score



Pay Pool Meeting: Change Scores

	AC	AD	AE	AF	AG	AH	AI	AJ	AK	AL	AM	AN	AO
Set Scores	Categorical Scores						Final Scores						
	prb solving	team wk	cust rftns	leadership	comm	rsrc mgmt	prb solving	team wk	cust rftns	leadership	comm	rsrc mgmt	
	<input type="text"/>												
	2MH	2MH	2MH	2MH	2MH	2MH	61	61	61	61	61	61	61
	3H	3M	3M	3M	3M	3M	79	73	73	73	73	73	73
	4M	4M	4M	4M	4M	4M	90	90	90	90	90	90	90
	4M	4M	4H	4H	4M	4M	92	92	99	99	92	92	92
	4H	4H	4H	4H	4H	4H	100	100	100	100	100	100	100
	4M	4H	4M	4H	4M	4M	95	98	95	100	95	95	95

- Change scores directly on the Data worksheet
- If Categorical Scores are used, change them first and then use the drop down list to change the numerical score

- Open CMS and import file
- Have them review all tabs spreadsheet
- Have them set up the parameters tab
- Have them check results
- Have them use discretionary GPI
- Have them hold several people out of both payout algorithms
- Have them look at all of the tabs

Uploading Data Back to CAS2Net

Compensation Management Spreadsheet

Cycle: 2015 Version: PR 02

The purpose of this spreadsheet is to record appraisal scores and set basic pay rates and contribution-based financial awards.

Data/Spreadsheet Download -- Download the data file from the CAS²Net, then click on Import to load the file into this spreadsheet.

Appraisal Score Entry -- Once the file has been loaded, assign categorical and final scores for each factor, and view reports and graphs.

Score Normalization -- Compare score distributions to look for anomalies and scale differences. Run preliminary pay adjustment scenarios. Set CRI and CA parameters and assign pay outs to employees.

Data Maintenance -- All additions, deletions, and modifications must be done in the central database. All columns except for data entry and "wild-card" are locked. To preserve your work, export the data from this spreadsheet and upload to CAS²Net before changing any information in CAS²Net.

Final "G" Setting -- This spreadsheet comes with a best estimate of "G." Once you have been notified that "G" is set, make a final round trip to CAS²Net. The final "G" value and related parameters will be included in the download of your paypool data.

Final Compensation Setting -- After the final round trip to update "G", finalize the pay adjustments and awards for your pay pool.

Data Upload -- Use Export to create a file for uploading the results from your pay pool to CAS²Net.

Generate Part 1's -- First use the filters to select employees; sort data by preferred order; then click on the Generate Part I to generate Part I of the Appraisal Form for each selected employee.

Pay Pool Data
[Import](#) [View](#) [Export](#) Last Import: 8/19/2015 (2:16:59 PM)(CDT)
 Last Export:
 Last Modified:

Parameters
[Set CRI and CA Parameters](#)

Summary Reports
[Rails Report](#)
[Career Path Factor Matrices ranked by Final Score](#)
[Summary Statistics of Delta OCS](#)
[Distribution of Delta OCS](#)
[Customizable Summary](#)

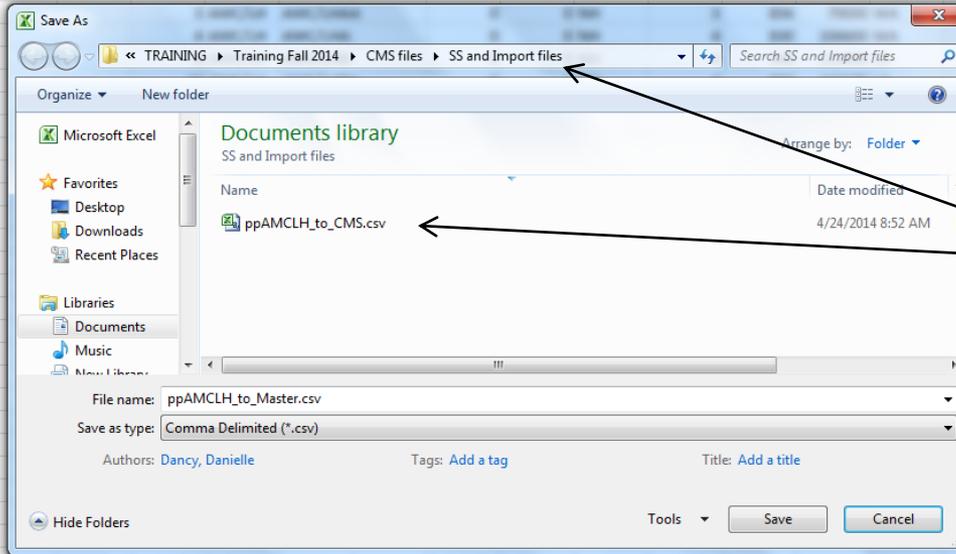
Scatter-plots of OCS Score by Salary
[Current Pay & 2015 SPL](#) [New Pay & 2016 SPL](#)

Part 1 of Appraisal Forms
[Open Existing Evaluation](#)
Validate Data, then use the filters to select individuals and use sort to put the data in preferred order.
[Generate Part 1 of Appraisal Forms](#)

Contents Parameters Data Matrix Rails Delta Stats Delta Plot Cur OCS New OCS Summary

From the Contents worksheet, click on the Export button to create an export CSV file

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	
GPI (G)%	GS-1/step	GS-1/step	CRI%	CRI Set-As	Award%	Award Set	Beta 1 (CR	Beta 2 (Av	Minimum	Minimum	Minimum	GPI (G) Ca	CRI Remai	Award Re	Alpha 1	Alpha 2	
1	17981	17803	2	0	1	2	1	1	0	0	0	0	70	-52	0.195777	0.1075	
Last Name	First Name	Middle Ini	Suffix	CAS2Net I	Pay Pool	Office Syn	Wildcard	Presumpt	Retained	Career Pa	Broadban	Occ Series	CY2014 Ba	Locality C	Locality R	CY2014	
Freeman	Francis			2	AMC/LH	AMC/LH		0	0	NH	2	318	58000	WA		0.2422	580
Garfield	George															0.2422	790
CURTISS	Dan															0.2422	1060
Gonzalez	Helena															0.2716	1114
Olson	Peter															0.2716	1300
Quarles	Richard															0.1416	1180
Stewart	Tammy															0.2419	1200
Udell	Vincent															0.2716	895
Burns	Barry															0.2716	825
Evans	Erin															0.2716	780
Grimes	Garth															0.2716	558
Harris	Henry															0.2716	577
Jerris	Jane															0.2409	1250
Lawrence	Lance															0.2716	720
Martinez	Mary															0.2716	790
Nance	Nolan															0.2716	845
O'Connor	Olive															0.2872	1010
Yates	Zane															0.2716	880
Parsons	Patricia															0.2422	585
Rhone	Ronald															0.2716	610
Artis	Amy															0.2422	435
Donaldson	Dennis															0.2716	440
Irinski	Ivan															0.2716	550
Karnes	Keith															0.2716	430



- Save the CSV file in a protected folder

Note: CMS Spreadsheet applies built-in naming convention functionality to generate filename

Civilian Acquisition Workforce Personnel Demonstration Project, Department of Defense (DOD)

Acq Demo

Employee Menu

- Contribution Planning
- Mid-Point Review Self-Assessment
- Annual Appraisal Self-Assessment
- Closeout Self-Assessment
- Reports

Full Access User Menu

- Welcome
- Reports
- Data Maintenance
- Session Maintenance
- Offline Interface**
- Paypool Notices
- Demo Reset
- RT Database Maintenance

Offline Interface

Offline Interface Menu

Pay Pool: AMC/LH

Download: Download Employee Data
Last completed download: None

Upload: Upload Employee Data
Last completed upload: None

Civilian Acquisition Workforce Personnel
Demonstration Project, Department of Defense (DOD)

Acq Demo

Employee Menu

- Contribution Planning
- Mid-Point Review Self-Assessment
- Annual Appraisal Self-Assessment
- Closeout Self-Assessment
- Reports

Full Access User Menu

- Welcome
- Reports
- Data Maintenance
- Session Maintenance
- Offline Interface**
- Paypool Notices
- Demo Reset
- RT Database Maintenance

Offline Interface - Upload Employee Data

Upload Form

Specify AMC/LH upload file: **Browse...**

Command:

[Return to Offline Interface Main Menu](#)

Select saved CSV file and Upload to complete the process

Make sure you organize the records in the data tab in the order you want them printed

Compensation Management Spreadsheet

Cycle: 2015 Version: PR 02

The purpose of this spreadsheet is to record appraisal scores and set basic pay rates and contribution-based financial awards.

Data/Spreadsheet Download -- Download the data file from the CAS²Net, then click on Import to load the file into this spreadsheet.

Appraisal Score Entry -- Once the file has been loaded, assign categorical and final scores for each factor, and view reports and graphs.

Score Normalization -- Compare score distributions to look for anomalies and scale differences. Run preliminary pay adjustment scenarios. Set CRI and CA parameters and assign pay outs to employees.

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Generate Part 1's -- First use the filters to select employees; sort data by preferred order; then click on the Generate Part I to generate Part I of the Appraisal Form for each selected employee.

Pay Pool Data

[Import](#) [View](#) [Export](#)

Last Import: 8/19/2015 (2:16:59 PM)(CDT)

Last Export:

Last Modified:

Parameters

[Set CRI and CA Parameters](#)

Summary Reports

[Rails Report](#)

[Career Path Factor Matrices ranked by Final Score](#)

[Summary Statistics of Delta OCS](#)

[Distribution of Delta OCS](#)

[Customizable Summary](#)

Scatter-plots of OCS Score by Salary

[Current Pay & 2015 SPL](#) [New Pay & 2016 SPL](#)

Part 1 of Appraisal Forms

[Open Existing Evaluation](#)

Validate Data, then use the filters to select individuals and use sort to put the data in preferred order.

[Generate Part 1 of Appraisal Forms](#)

Pay Pool Analysis Tool (PAT)

Create Import File for PAT (CMS Export File)

The export file from the CMS is also the import file for the PAT. Create the file by clicking on the Export link in the CMS and save it in the same folder as the PAT.

Compensation Management Spreadsheet

Cycle: 2016

Version: Dev 4

The purpose of this spreadsheet is to record appraisal scores and set basic pay rates and contribution-based financial awards.

Data/Spreadsheet Download -- Download the data file from the CAS²Net, then click on Import to load the file into this spreadsheet.

Appraisal Score Entry -- Once the file has been loaded, assign categorical and final scores for each factor, and view reports and graphs.

Score Normalization -- Compare score distributions to look for anomalies and scale differences. Run preliminary pay adjustment scenarios. Set CRI and CA parameters and assign pay outs to employees.

Data Maintenance -- All additions, deletions, and modifications must be done in the central database. All columns except for data entry and "wild-card" are locked. To preserve your work, export the data from this spreadsheet and upload to CAS²Net before changing any information in CAS²Net.

Final "G" Setting -- This spreadsheet comes with a best estimate of "G." Once you have been notified that "G" is set, make a final round trip to CAS²Net. The final "G" value and related parameters will be included in the download of your paypool data.

Final Compensation Setting -- After the final round trip to update "G", finalize the pay adjustments and awards for your pay pool.

Data Upload -- Use Export to create a file for uploading the results from your pay pool to CAS²Net.

Generate Part 1's -- First use the filters to select employees; sort data by preferred order; then click on the Generate Part I to generate Part I of the Appraisal Form for each selected employee.

Pay Pool Data

[Import](#) [View](#) [Export](#)

Last Import: 8/3/2016 (3:08:29 PM)(CDT)

Last Export:

Last Modified:

Parameters

[Set CRI and CA Parameters](#)

Summary Reports

[Rails Report](#)

[Career Path Factor Matrices ranked by Final Score](#)

[Summary Statistics of Delta OCS](#)

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[Current Pay & 2016 SPL](#) [New Pay & 2017 SPL](#)

Part 1 of Appraisal Forms

[Open Existing Evaluation](#)

Validate Data, then use the filters to select individuals and use sort to put the data in preferred order.

[Generate Part 1 of Appraisal Forms](#)

Contents Page for PAT

Pay Pool Analysis Tool (PAT)

2015 v2

For Official Use Only
Personal Data - Privacy Act of 1974

This tool combines one or more export files from the Compensation Management Spreadsheet (CMS) and provides analysis of the pay pool(s) results including OCS, CRI, CA and funding.

How to use this spreadsheet:

[Import](#) one or more export files from Compensation Management Spreadsheet (CMS)

Table of Contents

Data	Pay Pool Data from CMS
Statistics	Average OCS and Delta OCS by Rating Official, Sub-panel Mgr, Pay Pool, and Wildcard
Rating Statistics	Average OCS and Delta OCS by Career Path and Band
Distributions by Group	Zone Distributions by Number and Percent for various groups
Zone Distribution by Group	Zone Distribution Charts by Pay Pool and Wildcard
Payout Statistics	Statistics on Salary Increase and Award (\$ and %) by Pay Pool
Payout Charts	Above Statistics in Chart Form
Payout Stats by Group	Statistics on Salary Increase and Award (\$ and %) by various groups and wildcard
Payout Charts by Group	Above Statistics in Chart Form
Payout Charts by Wildcard	Above Wildcard Statistics in Chart Form
Funding Statistics	Statistics on Funding Amounts Budgeted and Allocated by Pay Pool
Funding Charts	Above Statistics in Chart Form
Net Draw Analysis	Summary of Net Draw Statistics by Career Path, Band, and Wildcard
Net Draw Charts	Above Statistics in Chart Form
CP-B Counts	Counts by Career Path and Band Combinations
Salary	Average Salary by Career Path and Band Combinations
Rail Report	Report of Rail Zone and OCS Chart for Aggregate Report

Example of Statistical Tables

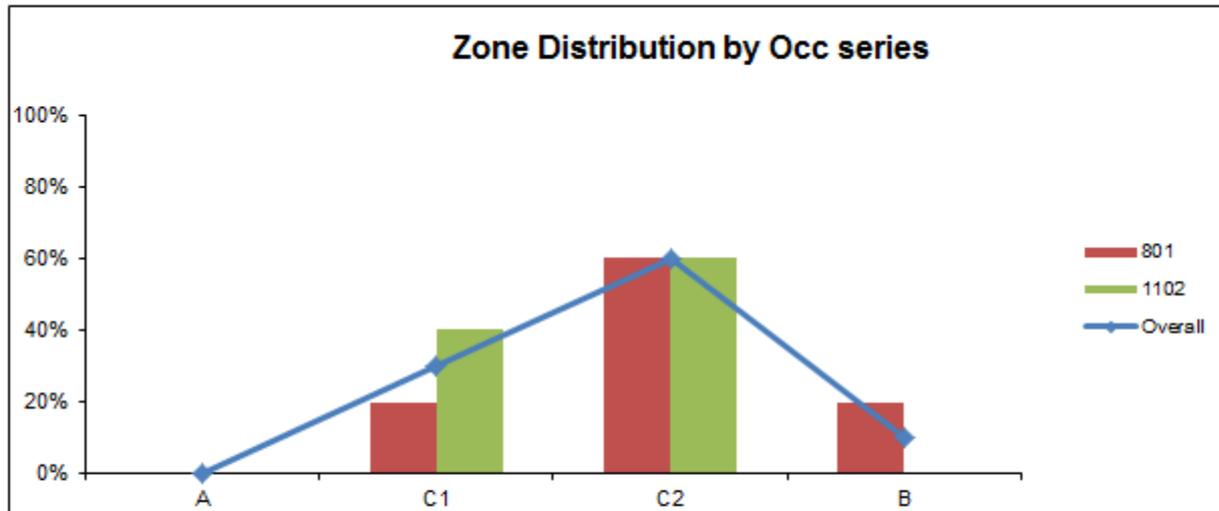
Rating Statistics

Analyzed Population does not include Presumptives Due to Time

	Overall	Test Pay Pool
Analyzed Population	10	10
Average Rating of Record	84.0	84.0
NH-1		
NH-2	70.0	70.0
NH-3	80.5	80.5
NH-4	95.7	95.7
NJ-1		
NJ-2		
NJ-3		
NJ-4		
NK-1		
NK-2		
NK-3		
Average Delta OCS	1.6	1.6
NH-1		
NH-2	4.0	4.0
NH-3	1.2	1.2
NH-4	1.7	1.7
NJ-1		
NJ-2		
NJ-3		
NJ-4		
NK-1		
NK-2		
NK-3		

Sample Chart

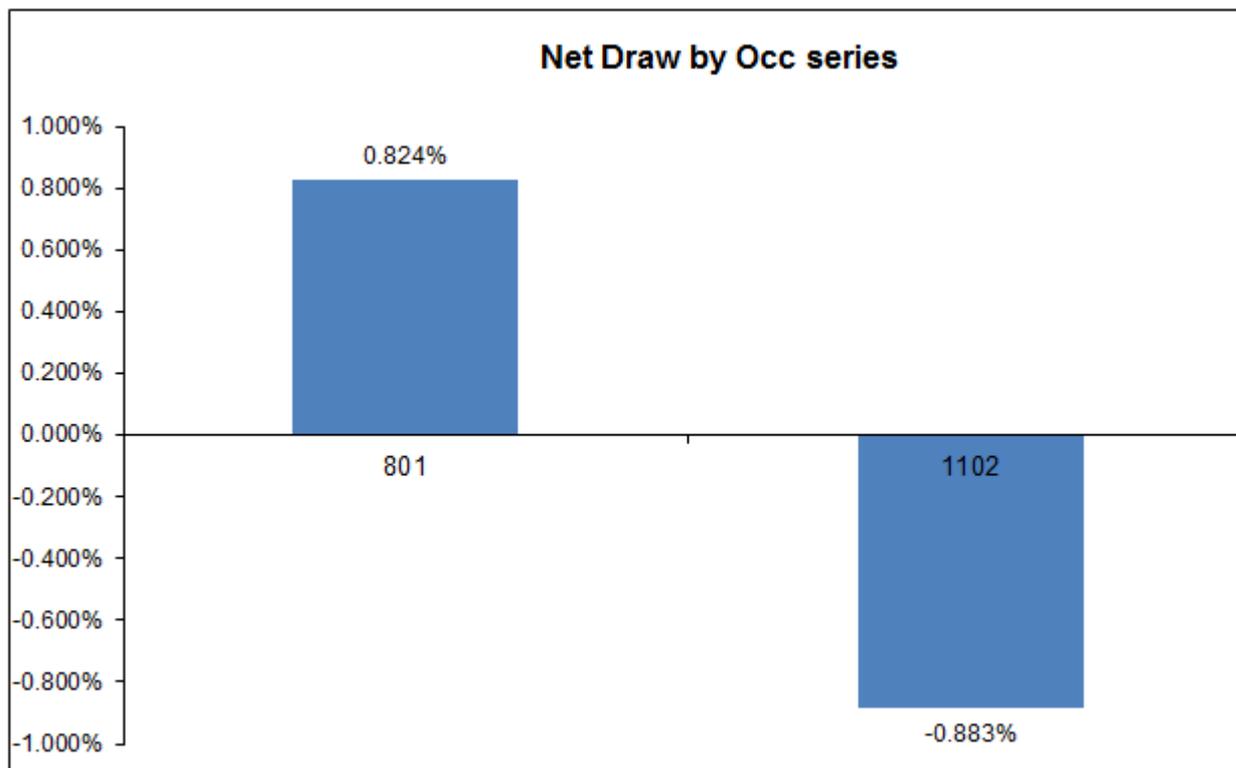
Zone Distribution by Occ series



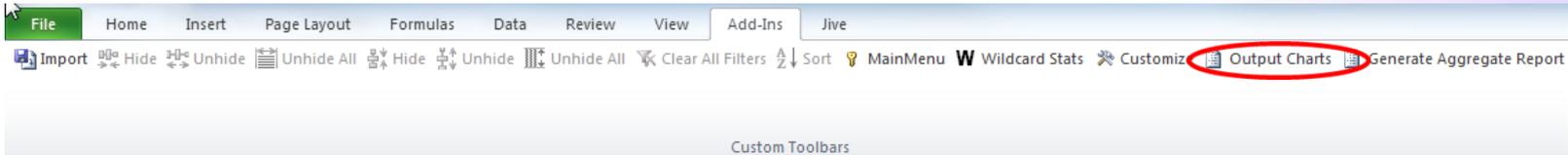
	Employees Rated	A	C1	C2	B
	10	0.0%	30.0%	60.0%	10.0%
801	5	0.0%	20.0%	60.0%	20.0%
1102	5	0.0%	40.0%	60.0%	0.0%

Net Draw

Net draw the funding drawn from CRI and CA funding pots by a group minus the funding contributed to CRI and CA funding pots for the group. It is a good measure to compare payouts between groups.

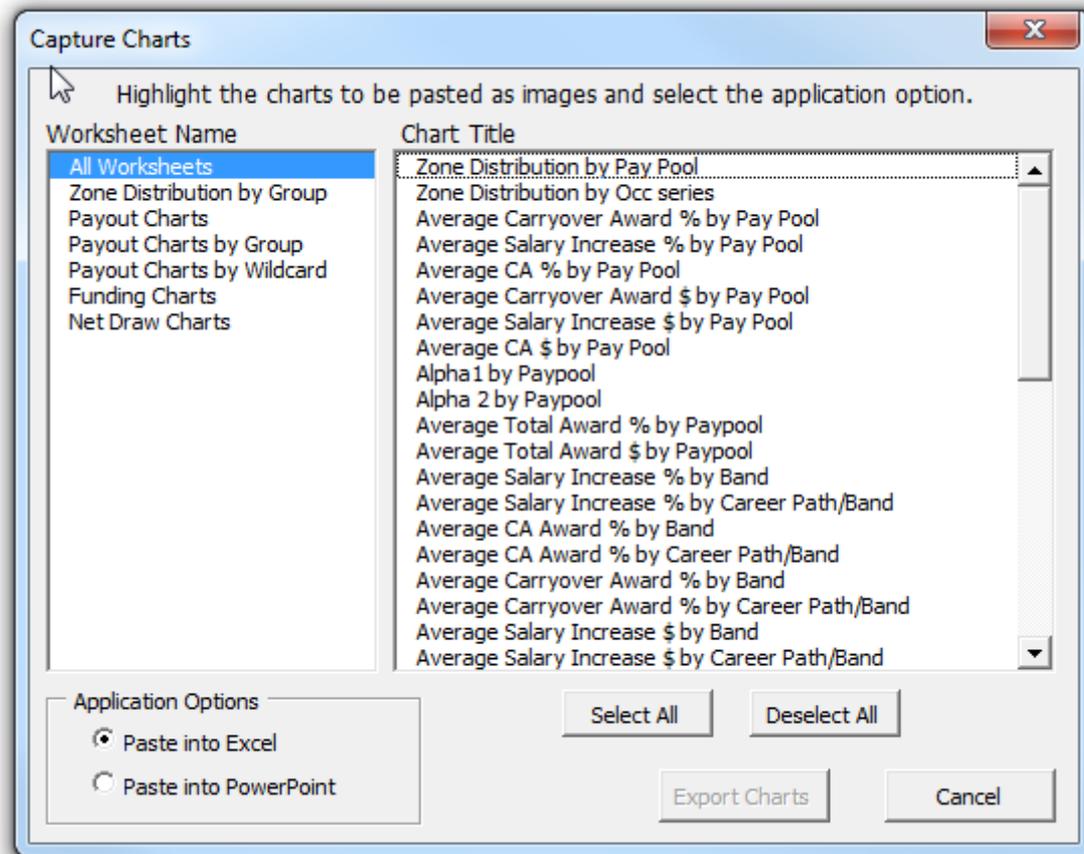


Creating a Briefing

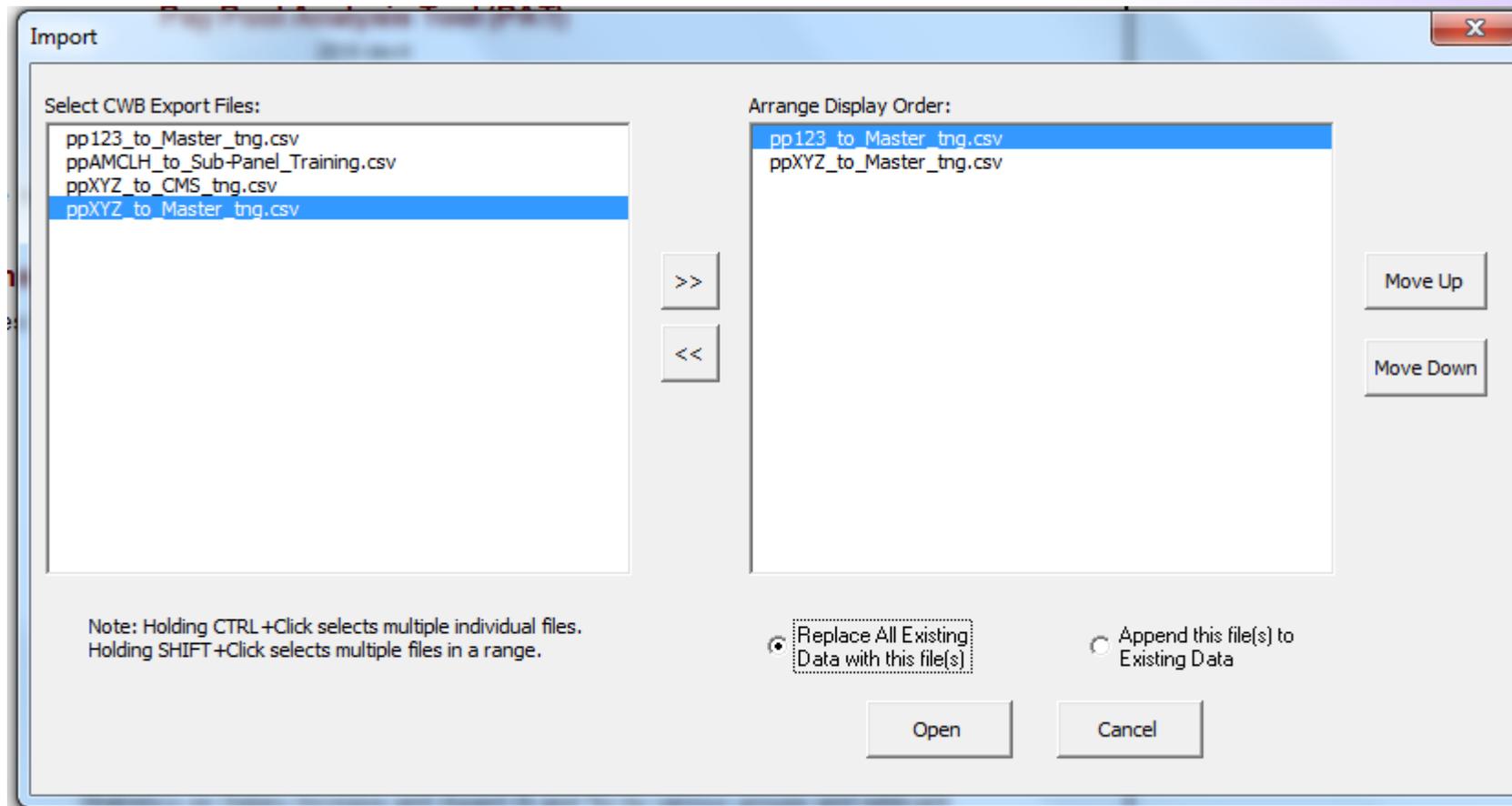


The PAT allows the organization to generate a briefing of results. Note that the PAT ensures that only pictures are captured for the briefing (and not the full underlying spreadsheet which would make PII available in the briefing).

Select List for Results Briefing



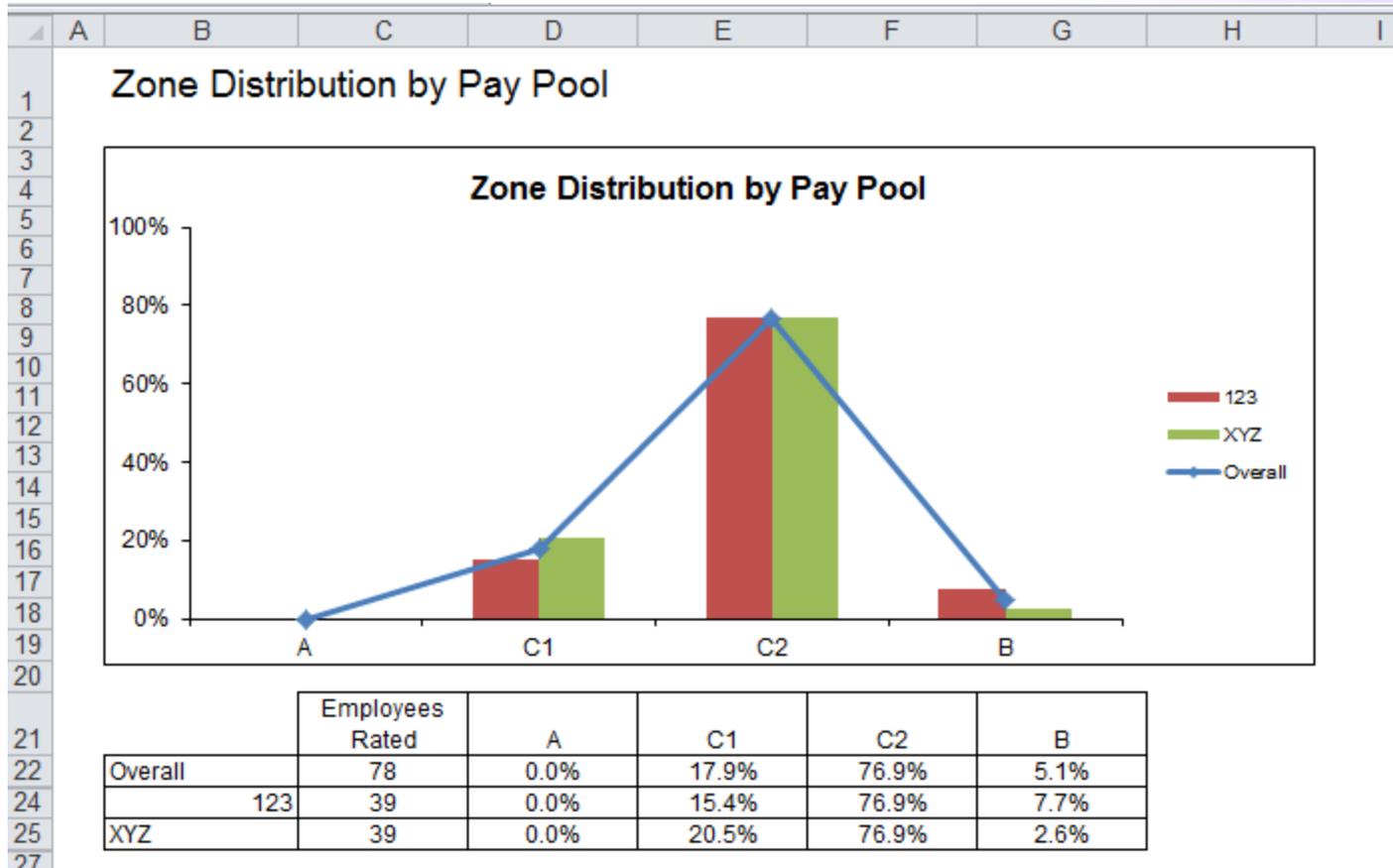
Import Data from Two Pay Pools



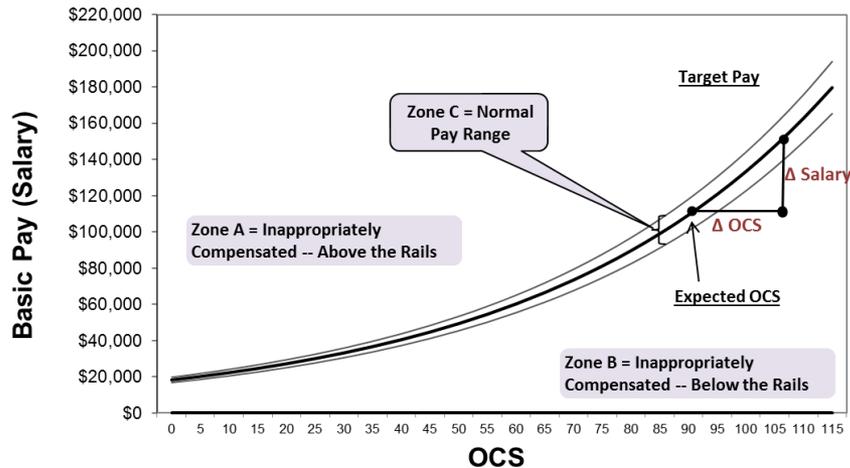
PAT with Two Pay Pools - 1

	A	B	C	D	F	G	I	J
1		Rating Statistics						
2		Analyzed Population does not include Presumptives Due to Time						
3				Overall	123	XYZ		
4		Analyzed Population		78	39	39		
5		Average Rating of Record		66.0	67.7	64.2		
6		NH-1						
7		NH-2		50.6	51.0	50.3		
8		NH-3		74.6	74.7	74.5		
9		NH-4		91.4	94.0	87.8		
10		NJ-1						
11		NJ-2						
12		NJ-3		52.8	54.0	51.5		
13		NJ-4		78.7	78.7	78.7		
14		NK-1		19.0	19.0	19.0		
15		NK-2		38.8	38.0	39.4		
16		NK-3		42.0	42.0	42.0		
17		Average Delta OCS		1.6	1.8	1.4		
18		NH-1						
19		NH-2		1.8	2.0	1.7		
20		NH-3		1.5	1.7	1.4		
21		NH-4		1.2	1.4	0.8		
22		NJ-1						
23		NJ-2						
24		NJ-3		3.3	4.5	2.0		

PAT with Two Pat Pools - 2



- Generate Export File from the CMS and store in the same folder as the PAT
- Import the file to the PAT
- Review several tables and charts
- Use a wild card column
- Review additional tables and charts
- Generate a briefing
- Import file from second pay pool
- Repeat above



The middle line is the SPL

The AcqDemo Federal Register specifies that the SPL should produce the GS-1 Step 1 pay when Overall Contribution Score (OCS) is 0 and the GS-15 Step 10 pay when OCS is 100. For 2016 the formula for the SPL is

$$\text{Salary} = \$18,343 * (1.0200425) ** \text{OCS}$$

where * indicates "multiplication" and ** indicates "to the power of"

Question 1: How much of a pay increase is each OCS point worth ?

- a) About \$2
- b) About \$18,000
- c) About 2%

Question 2: Is the calculation of the increase in

- a) dollars
- b) %

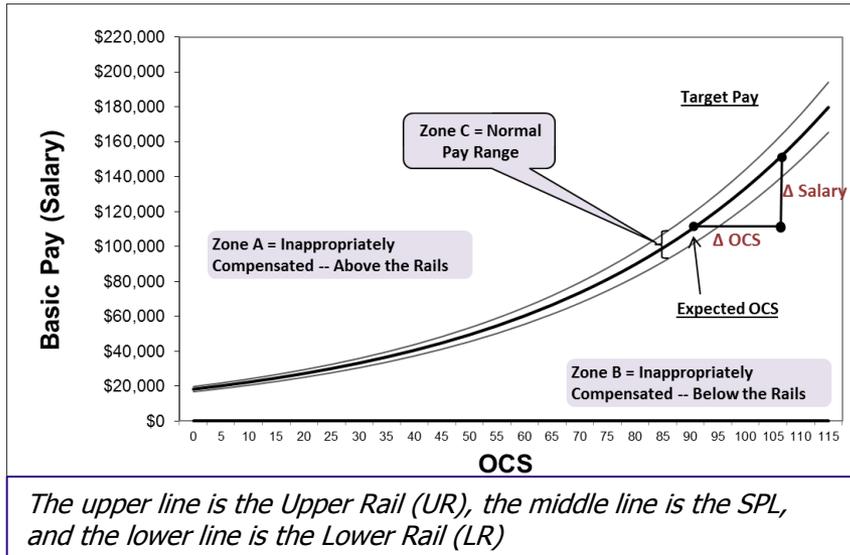
Question 3: If Employee A has a basic pay of \$50,000 and Employee B has a basic pay \$100,000, both are in the same pay pool, and both have the same Delta OCS: How does Delta Salary compare between Employee A and B?

- a) It is the same percentage of their salaries
- b) Employee B's dollar amount is twice that of employee A
- c) Both a) and b)
- d) Neither a) nor b)

The "so what":

If you peanut butter spread delta OCS so that everyone receives about the same percentage pay increase, you have wasted the power of AcqDemo

A delta OCS of 5 would yield a 10% increase in pay



The "so what":

The goal is to have everyone in the Normal Pay Range (Zone C)

- CRI moves employees in Zone B toward Zone C.
- Withholding GPI from those in Zone A, eventually allows Zone C to catch up to them.

Assume that the Target for Base Pay is the SPL.

Question 1: How do you find the expected OCS for a person whose basic pay is \$60,000?

- Draw a horizontal line from \$60,000 on the vertical axis to the right until it hits the UR and then a vertical line down to the OCS or horizontal axis.
- Draw a horizontal line from \$60,000 on the vertical axis to the right until it hits the SPL and then a vertical line down to the OCS or horizontal axis.
- Draw a horizontal line from \$60,000 on the vertical axis to the right until it hits the LR and then a vertical line down to the OCS or horizontal axis.

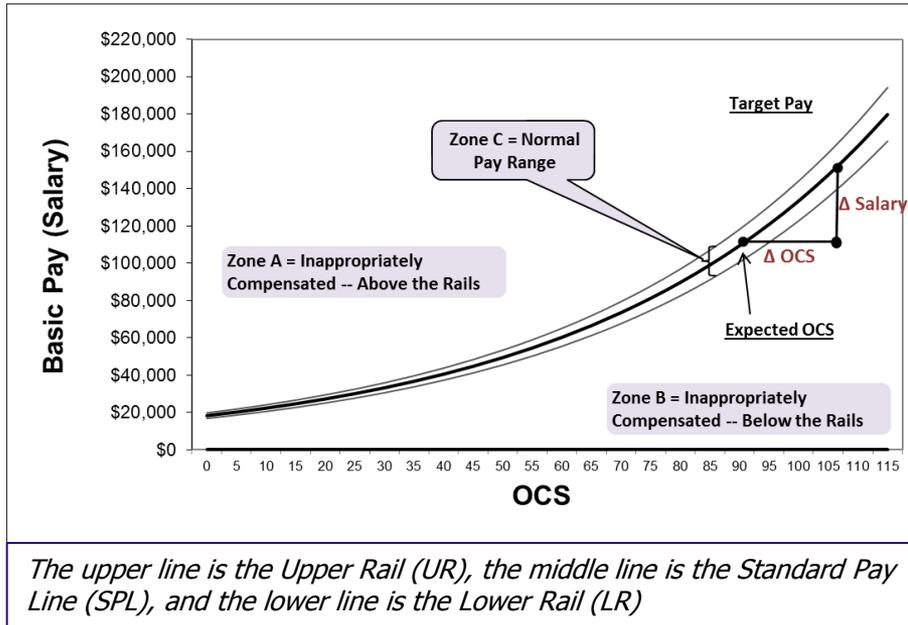
Question 2: How do you find the pay a person should be receiving if their OCS is 70?

(discuss and summarize response to share with class)

Question 3: If the expected score range is Zone C (Normal Pay Range), how do you find the expected score range for an employee with a salary of \$60,000.

Choose the correct answer:

- a) and b) from Question 1
- b) and c) from Question 1
- a) and c) from Question 1



The difference between actual score and expected score, based on current basic pay, is called Delta Overall Contribution Score or Delta OCS.

Question 1: If we assume that the target for basic pay is the Standard Pay Line, how do you translate Delta OCS into Delta Salary?

- a) It is Delta OCS on the graph
- b) Starting at the basic pay of the employee on the vertical axis draw a horizontal line to the right to where it would intersect a vertical line drawn up from the OCS axis at the OCS for the employee. The distance from that intersection to where the vertical line intersects the target line is Delta Salary.
- c) It is not shown on the graph

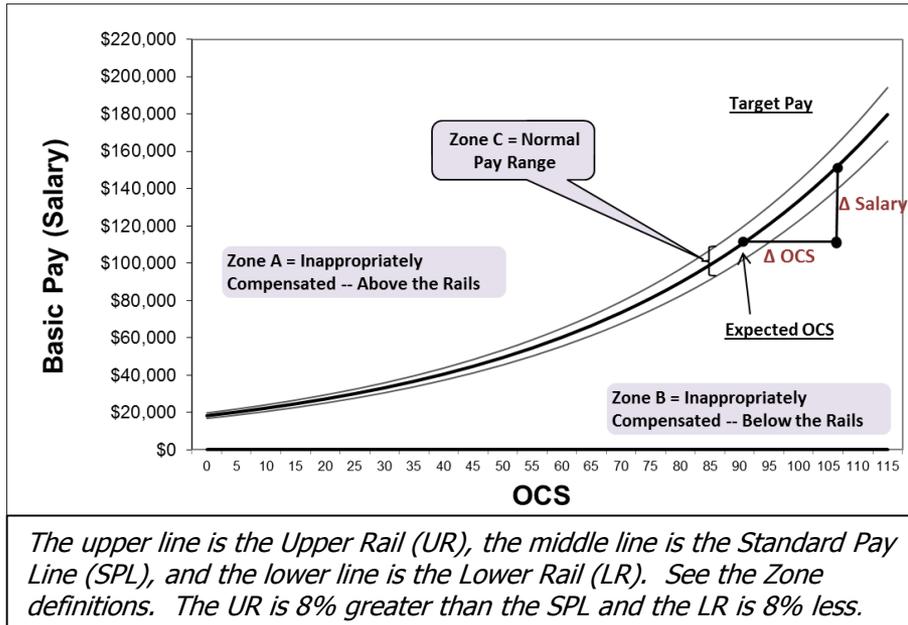
Question 2: Can Delta Salary be negative?

- a) Yes
- b) No

Question 3: If the target for CRI is the upper rail rather than the SPL?

- a) Delta Salary is smaller
- b) Delta Salary is the same
- c) Delta Salary is larger

The "so what":
Receiving GPI does not move the employee closer to the target (i.e. SPL) because the target moves with the GPI



The "so what":

It's not always the top of the pay band that is the most restrictive cap. Other caps may be lower and if so, the lowest applies

Question 1: The General Pay Increase (GPI) for 2016 was 1% and resulted in an increase in pay in the GS Tables. In AcqDemo:

- Employees whose basic pay and OCS plot in any Zone from the graph must receive GPI
- Employees whose basic pay and OCS plot in Zone A can have GPI withheld
- Any employee can have GPI withheld, regardless of Zone

Question 2: One of the pay caps is that the pay increase for an employee who plots in Zone B take their salary more than 6% above the lower rail. What is the purpose of this pay cap?

- To make the computation more difficult
- To keep employees who are just below the LR from having new pay above the SPL due to the potential 20% increase in Zone B
- To keep employees from hitting the top pay of their broadband

Question 3: The very high score for NH-IV is 115, where the OCS that produces the top pay for NH employees is 100. Using this as the pattern, how were the very high scores set for NK and NJ?

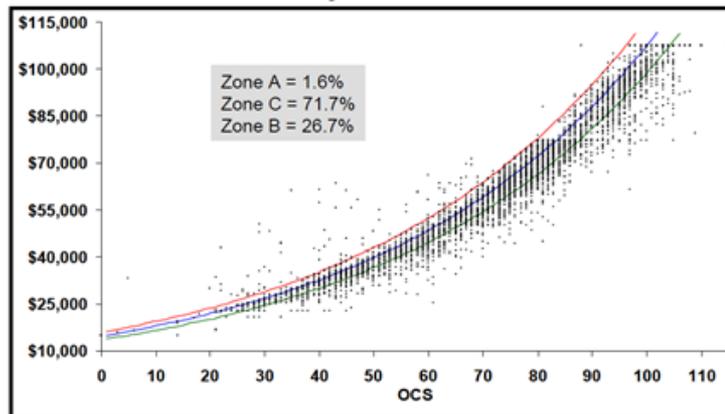
- By throwing darts at a dartboard
- 10% above the OCS that produces the top basic pay for NK and NJ employees
- 15% above the OCS that produces the top pay for NK and NJ employees

Change in Scatter Plot over Time

First years: Shot Gun Pattern due to change from longevity-based system to contribution-based system

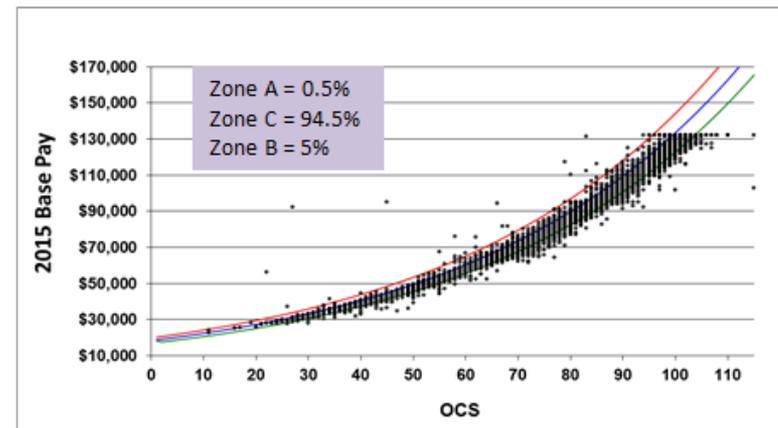
Later years: CRI works to bring those below the target up to the target. Withheld GPI lets the rails catch up to those in Zone A

2002 AcqDemo Scatter Plot



2002

2015 AcqDemo Scatter Plot



2015

BACKUP

- **CRI %** - The pay pool's overall CRI budget, expressed as a percent of total annual base pay in the pay pool as of 30 September 2005. This value must be at least 2.0 percent, which is also the default value. The two cells to the right of the percent show the dollar amount of the resulting CRI budget, and the enhanced CRI budget including unspent GPI money.
-
- **CRI Set-Aside** - The percent of the pay pool's overall CRI budget that is set aside for discretionary allocation by the pay pool manager. The default is 0.0 percent. You have the option of entering this value as a percent or dollar amount. The default algorithm built into the spreadsheet allocates the remaining budget.
-
- **Awd %** - The pay pool's overall CA budget, expressed as a percent of total annual base pay in the pay pool as of 30 September 2005. This value must be at least 1.0 percent, which is also the default value. In accordance with the AcqDemo **Federal Register** announcement, the value specified here is automatically multiplied by .9 to establish the CCAS award budget used in the workbook. The other 10 percent of the award funding is reserved for non-CCAS awards throughout the year. The two cells to the right of the percent show the dollar amount of the resulting CCAS CA budget, and the enhanced CA budget including unspent CRI money.
-
- **Awd Set-Aside** - The percent of the pay pool's overall CA budget that is set aside for discretionary allocation by the pay pool manager. The default is 0.0 percent. You have the option of entering this value as a percent or dollar amount. The default algorithm built into the spreadsheet allocates the remaining budget.
-
- **Beta 1 (CRI)** – Establishes target pay for CRI allocation as follows:
 - 1 = upper rail
 - 0 = SPL (default value)
 - -1 = lower rail
-
- **Beta 2 (CA)** – Establishes target pay for CA allocation as follows:
 - 1 = upper rail
 - 0 = SPL (default value)
 - -1 = lower rail
-
- **Minimum CRI Dollar Amount** – Any calculated CRI amounts below this minimum will be set to zero and the money added to the discretionary CRI remainder for allocation to other employees. The default is \$0.
-
- **Minimum CA Dollar Amount** – Any calculated CA amounts below this minimum will be set to zero and the money added to the discretionary CA remainder for allocation to other employees. The default is \$0.