

CAS2Net and CCAS Open Forum

Thursday
12 September 2024
1:00 PM Eastern Time

Topic: Transfer/Archive and Post Cycle Activities

(Note: Sub-Panel Meeting Spreadsheet and CMS (CAS2Net and Macro-enabled) will be presented 26 Sep 2024)

[TEAMS Meeting Link](#)

[Meeting ID:](#) 262 622 539 152

[Passcode:](#) K5GtNP

Meeting Call in Information

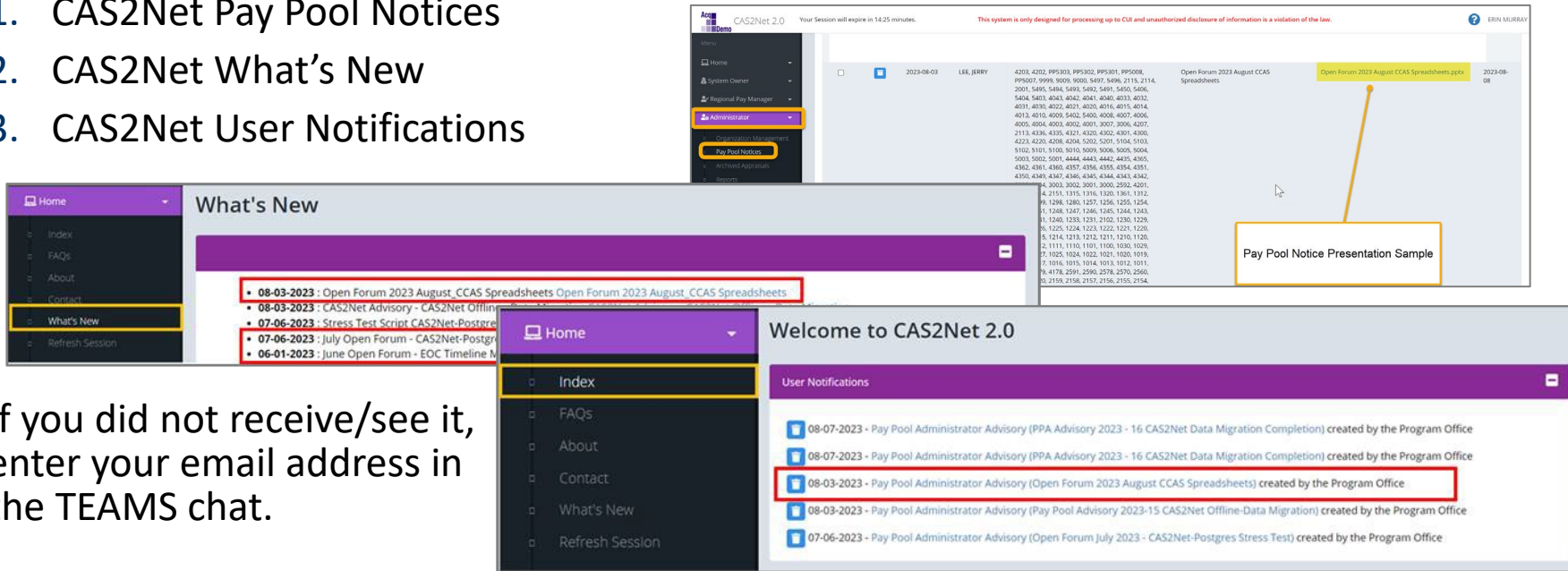
+1 571-403-9146

[Phone Conference ID:](#) 657 603 978#

Housekeeping Items

Open Forum slides are sent in advance through

1. CAS2Net Pay Pool Notices
2. CAS2Net What's New
3. CAS2Net User Notifications



If you did not receive/see it, enter your email address in the TEAMS chat.

Please remember to “Mute” your phone to prevent any background noise and additional feedback.

All Open Forum Sessions will be recorded.

Each recorded session will be posted to the AcqDemo website (including presentation slides) at <https://acqdemo.hci.mil/training.html#cas2netOpenForums>.

Today's Topics

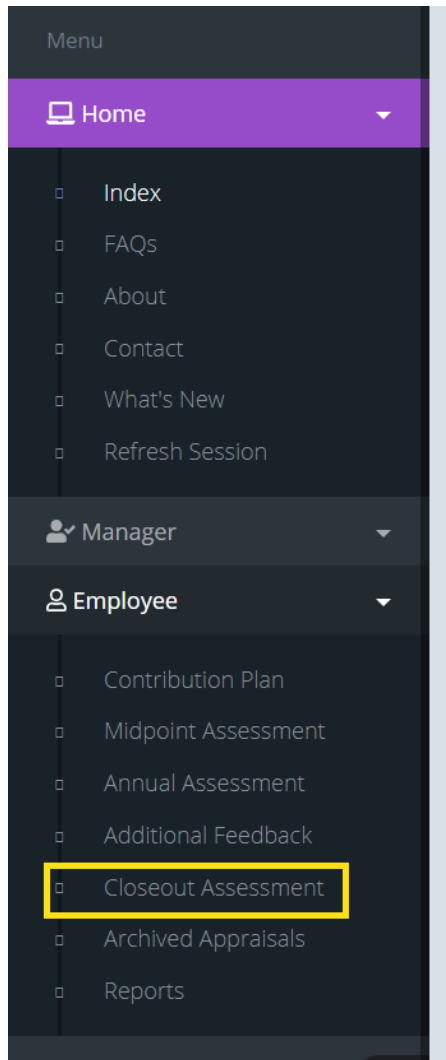
- Transfer Employees
- Archive Employees
- Archived/Transfer Employees
- Post Cycle Activities

Transferring Employees – Losing Pay Pool

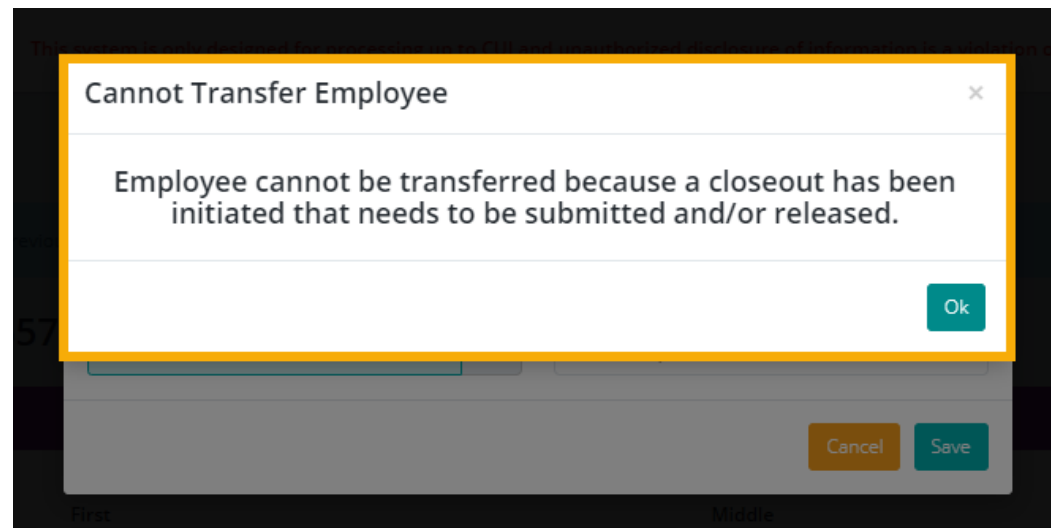
- The Transfer module serves as an interim user records storage for employees moving from one Pay Pool to another.
- To transfer an employee, go to: **Menu > Administrator > User Management > Assigned > Transfer User:**
 - Enter the End Date (*required*)
 - Enter the Gaining Organization (*if available*)
 - Save once done

The screenshot displays the CAS2Net 2.0 Training interface. At the top, it shows 'CAS2Net 2.0 Training' and a session expiration notice. A red warning banner states: 'This system is only designed for processing up to CUI and unauthorized disclosure of information is a violation of the law.' The user profile for 'CARTER, BEYONCE GK (ID #260601)' is visible, with fields for EDIPI, Prefix, First, Phone Number, Phone Ext, and Email. Below these are various permission checkboxes such as 'Can Access CAS2Net 2.0', 'Is Demo Employee', 'Can Be Team Lead', etc. A 'Transfer User' dialog box is overlaid on the profile, containing the text: 'Please select an end date and the Gaining Organization (if applicable) for the employee that is being transferred.' The dialog has fields for 'End Date' and 'Gaining Organization' (a dropdown menu), and 'Cancel' and 'Save' buttons. A yellow arrow points from the 'Transfer User' button in the bottom navigation bar to the dialog box.

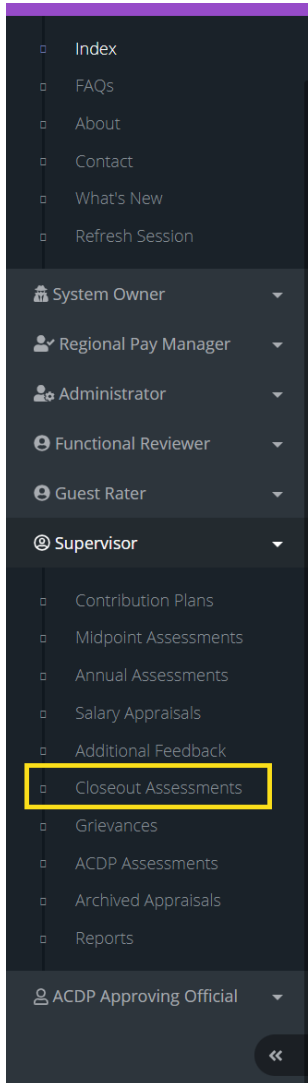
Transferring Employees – Losing Pay Pool



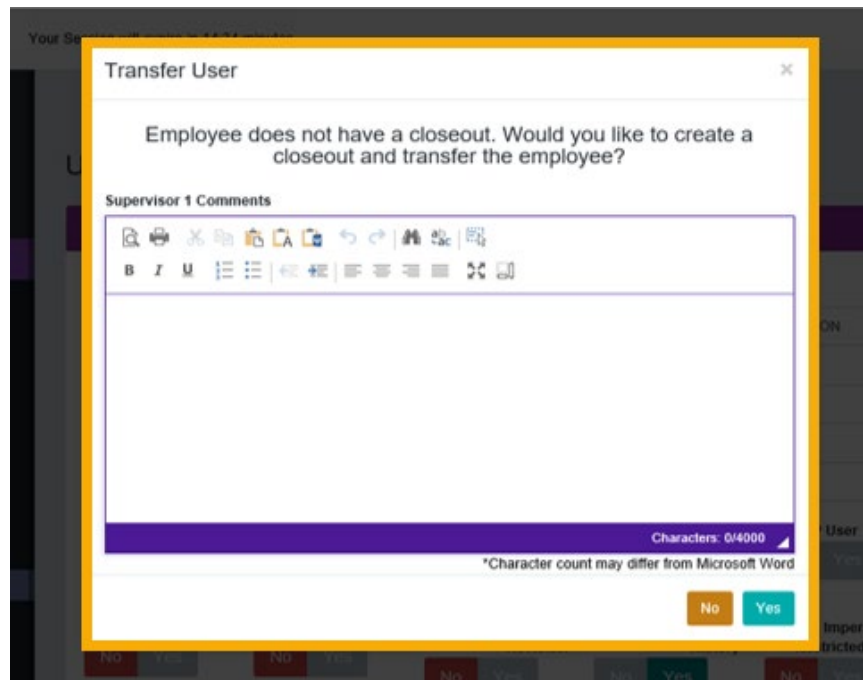
- Employees may enter the Closeout Assessment by navigating to: Menu > Employee > Closeout Assessment
- An employee should have a closeout assessment completed by their supervisor **before** the employee is transferred.
- If a closeout assessment has been initiated and is pending supervisor action, a dialog box will populate notifying the administrator the transfer cannot be processed until the pending closeout assessment is released.
 - Contact the supervisor 1 to ensure the closeout assessment is completed in order to proceed with the employee transfer



Transferring Employees – Losing Pay Pool

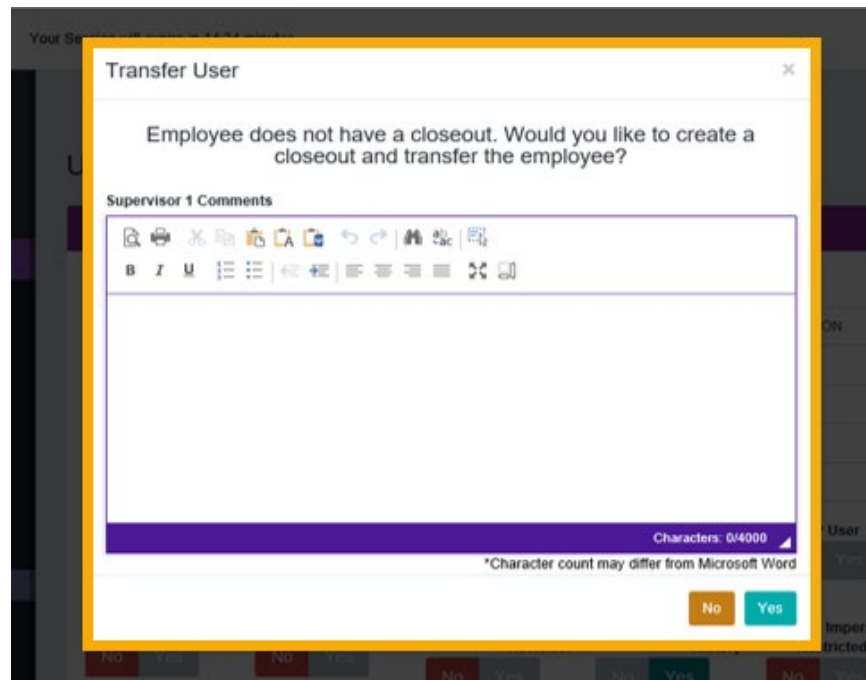


- To approve employee Closeout Assessment, go to: . Menu > Supervisor > Closeout Assessments
- You can either (1) discuss the closeout narrative with the supervisor and enter the narrative yourself using the dialog box or (2) contact the supervisor to complete it via the Closeout Assessment module



Transferring Employees – Losing Pay Pool

- If neither the employee or supervisor 1 have initiated a closeout, a Transfer User dialog box will populate allowing the administrator to submit the supervisor's closeout narrative.
 - You can either (1) discuss the closeout narrative with the supervisor and enter the narrative yourself using the dialog box or (2) contact the supervisor to complete it via the Closeout Assessment module



Transferring Employees – Gaining Pay Pool

The screenshot shows the Administrator menu with the following items:

- Administrator
- Appraisal Status
- Offline Interface
- Previous Cycle Data
- Sub-Panel Meeting
- CMS Online
- Macro-Free CMS/Subpanel Interface
- Organization Management
- Pay Pool Notices
- Archived Appraisals
- Reports
- Trusted Agent
- CCAS Management
- User Management**
 - Assigned
 - Archived/Transfer**
 - Replace Supervisor 1
 - Replace Supervisor 2
 - Replace Functional Reviewer
 - Bulk Add
 - Bulk Update
 - Email Users
- Functional Reviewer

- To retrieve user record, go to: Menu > Administrator > User Management > Archived/Transfer
- You can retrieve user record for employee(s) transferring from another organization into your managed organization through the Archived/Transfer page
- From checkboxes in the Select column of table with archived and transferred users, select checkboxes for user(s) to transfer

The screenshot shows the 'Select Employees' page with the following details:

- Header: Select Employees (Reset Data Table)
- Show: 100 entries
- Search: [Search Box]
- Table Headers: Select, Status, Name, EDIPI, Email
- Table Row 1: Transfer, ARCHIVE, TEST A, xxxxxxxxxxxx
- Footer: Showing 1 to 2 of 2 entries (filtered from 45,809 total entries) | Previous 1 Next

Transferring Employees – Gaining Pay Pool

- Click Continue
 - You will be redirected to the Assigned User page

Select Employees Reset Data Table

Show 100 entries Search:

Select	Status	Name	EDIPI	Email
<input checked="" type="checkbox"/>	Transfer	ARCHIVE, TEST A	XXXXXXXXXX	

Showing 1 to 2 of 2 entries (filtered from 45,809 total entries) Previous 1 Next

Selected Users +

Select	Status	Name	EDIPI	Email
<input checked="" type="checkbox"/>	Transfer	ARCHIVE, TEST A	XXXXXXXXXX	

Showing 1 to 1 of 1 entries

Cancel
Archive
Continue

Transferring Employees – Gaining Pay Pool

- In the Assigned User page, use Start Date in Organization dropdown to pick transferring user's start date
- Switch Is Demo Employee toggle button to Yes if user is a Demo Employee
- From Organization(Pay Pool /Sub Panel) drop-down, select desired organization level for user
- From Supervisor 1 and Supervisor 2 (if applicable) select drop-down for appropriate supervisor
- From Locality dropdown, select newly transferring user's locality
- Click Save

Assign Users

Employee List

Name	EDIPI	Email
ARCHIVE, TEST	XXXXXXXXXX	

Showing 1 to 1 of 1 entries

Bulk Change Fields

Start Date in Organization: 09-10-2024

Is Demo Employee: Yes

Organization (Pay Pool/Sub-Panel): Select Option

Locality: Select Option

Cancel Save

Transferring Employees – Gaining Pay Pool

- On save, user record moves from the Assigned/Transfer page to Menu > Administrator > User Management > Assigned page

The screenshot displays the 'List Assigned Users' page in a web application. On the left is a dark sidebar menu with 'Administrator' selected, and 'User Management' > 'Assigned' highlighted. The main content area is titled 'List Assigned Users' and contains a table of 'Assigned Employees'. The table has columns for 'Impersonate', 'Select', 'Name', 'Email', 'Pay Pool', 'Pay Pool Manager', 'Organization Level / Sub-Panel', and 'Supervisor 1'. The first row is highlighted in yellow and shows 'ARCHIVE, TEST A' assigned to the '9009 - 9009 Pay Pool' with 'ERIN MURRAY' as the supervisor. Search filters are visible above the table, and a 'Show 25 entries' dropdown is present.

Impersonate	Select	Name	Email	Pay Pool	Pay Pool Manager	Organization Level / Sub-Panel	Supervisor 1
	<input type="checkbox"/>	ARCHIVE, TEST A	ERIN.MURRAY@DAU.EDU	9009 - 9009 Pay Pool	PAY POOL MANAGER	9009 - 9009 Pay Pool	ERIN MURRAY
	<input type="checkbox"/>	[blurred]	[blurred]	[blurred]	[blurred]	[blurred]	[blurred]
	<input type="checkbox"/>	[blurred]	[blurred]	[blurred]	[blurred]	[blurred]	[blurred]
	<input type="checkbox"/>	[blurred]	[blurred]	[blurred]	[blurred]	[blurred]	[blurred]
	<input type="checkbox"/>	[blurred]	[blurred]	[blurred]	[blurred]	[blurred]	[blurred]
	<input type="checkbox"/>	[blurred]	[blurred]	[blurred]	[blurred]	[blurred]	[blurred]
	<input type="checkbox"/>	[blurred]	[blurred]	[blurred]	[blurred]	[blurred]	[blurred]

Archived Employees

Archive Employees

- If an employee is leaving AcqDemo the administrator must archive their profile in CAS2Net.
 - Once archived the employee is removed from the list of active users while also archiving any associated records in the event the employee returns to AcqDemo in the future
- **To archive an employee, go to Menu > Administrator > User Management > Assigned > Archive:**
 - Enter the Loss Date (*required*)
 - Enter in the Loss Reason (*required*)
 - Save once done

The screenshot displays the 'User Profile - GRACKLE, COMMON (ID #236535)' page. The left sidebar shows the navigation menu with 'User Management > Assigned' selected. The main content area is divided into sections: 'General User Information', 'Organization Information', and 'User Profile'. The 'User Profile' section contains various fields for dates and status. A yellow box highlights the 'Archive User' dialog box, which is open over the 'Loss Date' and 'Loss Reason' fields. The dialog box has 'Cancel' and 'Save' buttons. At the bottom of the page, the 'Archive' button is highlighted in red.

Transfer Users

Transfer – On or Before 30 Sept 2024

- Transfers are defined as existing employees moving from one AcqDemo pay pool to another AcqDemo pay pool.
- If an employee is transferred on or before 30 Sept :
 - The **losing pay pool** must place the User Profile into transfer for the gaining pay pool.
 - The **gaining pay pool** then goes to Archived/Transfer to pull the User profile update data fields as needed, including HRSO and locality code.
- If an employee is transferred on or before 30 Sept **BUT the Administrator makes the action after 30 Sept:**
 - The **losing pay pool** must place User Profile into transfer for the gaining pay pool.
 - If there is a Previous Cycle Data record, the losing pay pool should confirm the Previous Cycle Data Record was deleted.
 - The **gaining pay pool** then goes to Archived/Transfer to pull the User Profile and update data fields as needed, including HRSO and locality code.
 - Must add to the Previous Cycle Data.

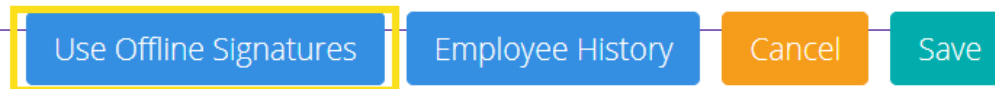
Transfer - After 30 Sept 2024

- AcqDemo employees transferring from one AcqDemo pay pool to another AcqDemo pay pool after 30 Sept:
 - The **losing pay pool** must place the User Profile into transfer for the gaining pay pool.
 - The losing organization must retain the Previous Cycle Data Record. This is because the employee was coded to the losing organization through the end of the previous cycle.
 - The **gaining pay pool** must go to Archived/Transfer to pull the User Profile if required then update the data fields as needed, including HRSO and locality code.
 - **Do not add** this post-cycle transfer to your Previous Cycle Data.

Archive User Profile

Archive User Profile

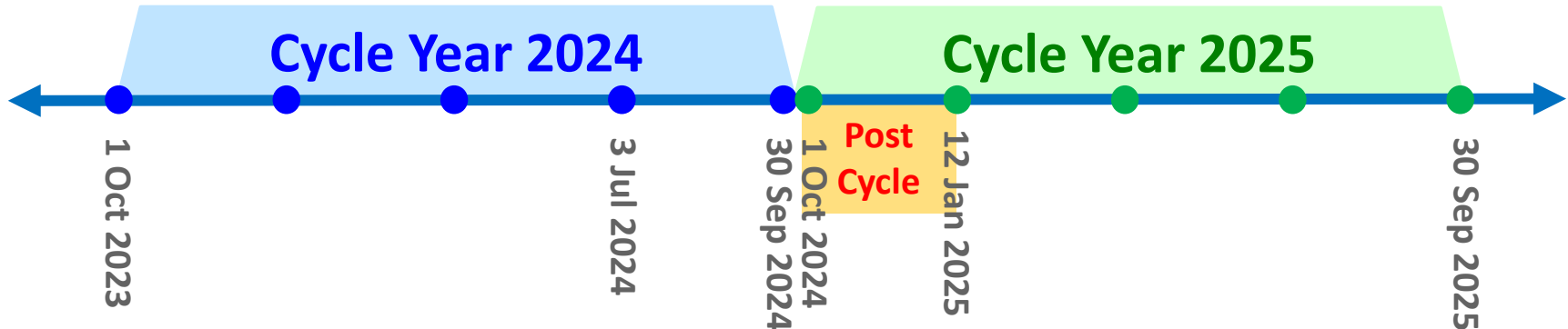
- Employees who leave AcqDemo must be archived. This includes archiving AcqDemo employee due to retirement, separation, death, reassignment/promotion out of AcqDemo.
 - Before 30 Sep...The archived employee will not have a Previous Cycle Data record.
 - On 30 Sep...The archived employee will have a Previous Cycle Data record and included in the pay pool.
 - 1 Oct or later...The archived employee **will** have a Previous Cycle Data record and will be included in the pay pool.
- If the Salary Appraisal Form was not signed and the employee is no longer available to sign, go to CCAS Management > Annual Assessments > Select the employee > click Use Offline Signature



Post Cycle Activities

Post Cycle Activities

- Post Cycle is the time period after the end of the rating period, e.g., the 2024 rating period will end on 30 Sep 2024. The post cycle for the 2024 rating cycle is 1 Oct 2024 to 12 Jan 2025.
- Post-Cycle Activity is to document a personnel action in CAS2Net, i.e., permanent promotion, temporary promotion, change to lower band level, death, LWOP, and ACDP basic pay increase that took place between 1 Oct and the **beginning of the first full period in January**. That date for 2025 is 12 January 2025.



Adding a Post Cycle Activity

- A Post Cycle Activity can be added by accessing employee's the User Profile
- Select the "Post Cycle Activity" button on the floating toolbar.

Info! Cannot add to previous cycle date because user contains a previous cycle record.

User Profile - BIRD, BLU (ID #232657)

General User Information Add to Previous Cycle Data Impersonate User

EDIPI: 9999999009 Prefix: First: BLU Middle: Last: BIRD Suffix:

Phone Number: Phone Ext: DSN:

Email: JEROLD.LEE@HCI.MIL Title: PROGRAM ANALYST

Can Access CAS2Net 2.0: No Yes Is Demo Employee: No Yes

History Post-Cycle Activity Archive Cancel Save

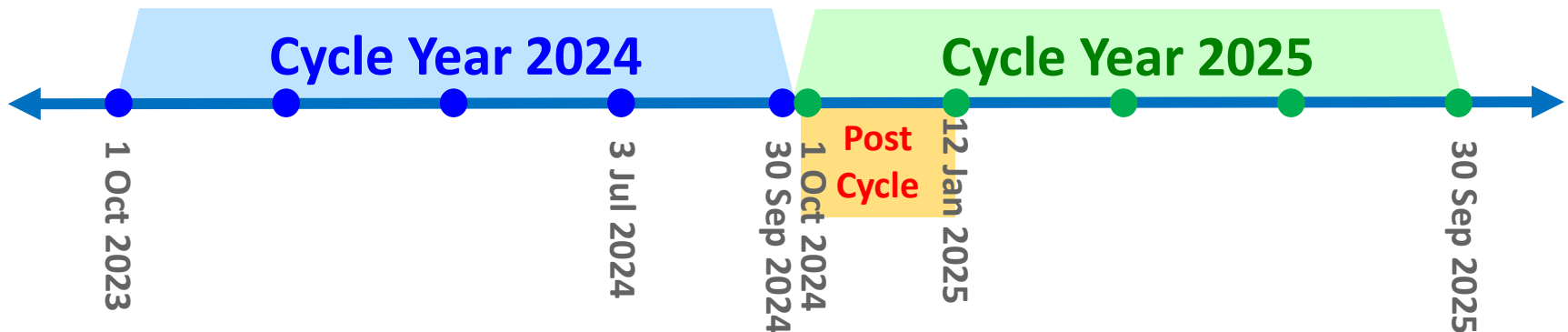
Post-Cycle Activity

Select Post Cycle Activity

- Promotion
- Temporary Promotion
- Change to Lower Band Level
- ACDP Basic Pay Increase
- Retirement
- Separation
- Death of Employee
- LWOP

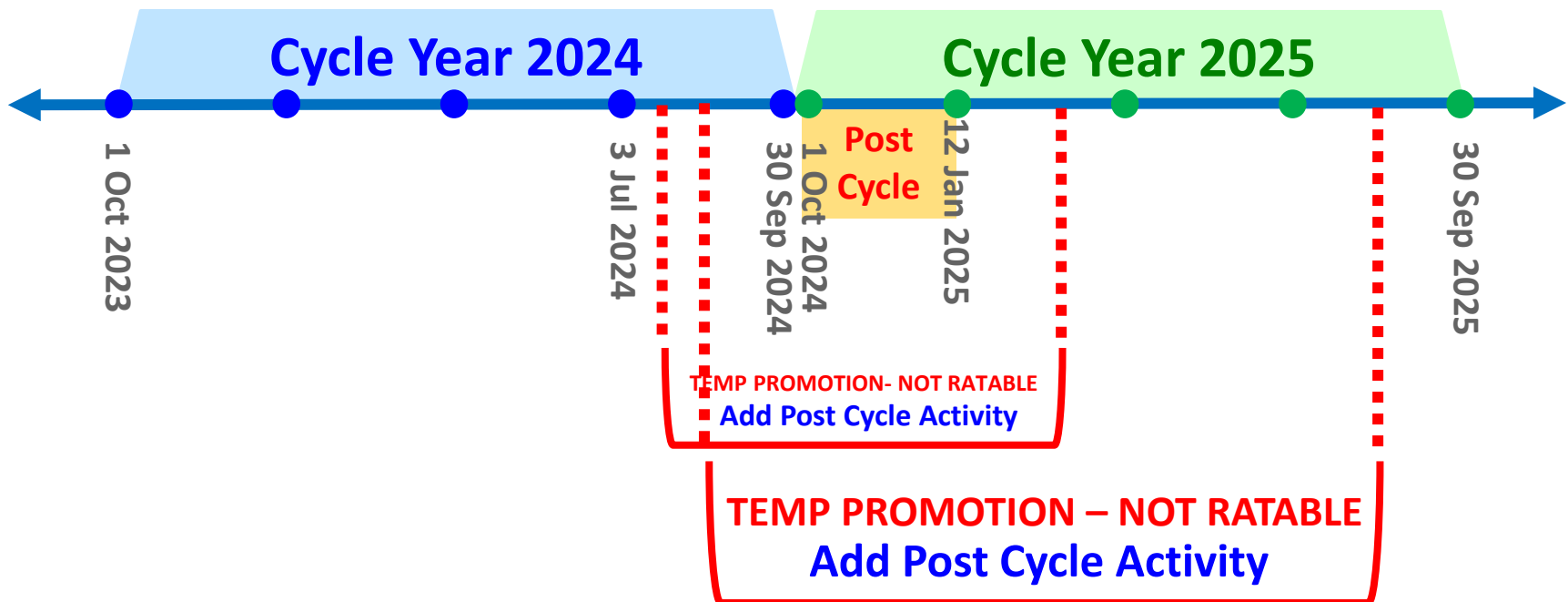
Post Cycle Activities - Permanent Promotions

- Permanent Promotions on or before 30 Sep 2024:
 - No post-cycle activity
 - Previous Cycle Data should match User Profile new pay and broadband level
- Permanent Promotions after 30 Sep 24:
 - In the User Profile, add a Post Cycle Activity - Promotion
 - User Profile should reflect new promotion data
 - Previous Cycle Data should reflect 30 Sep data (before the promotion)



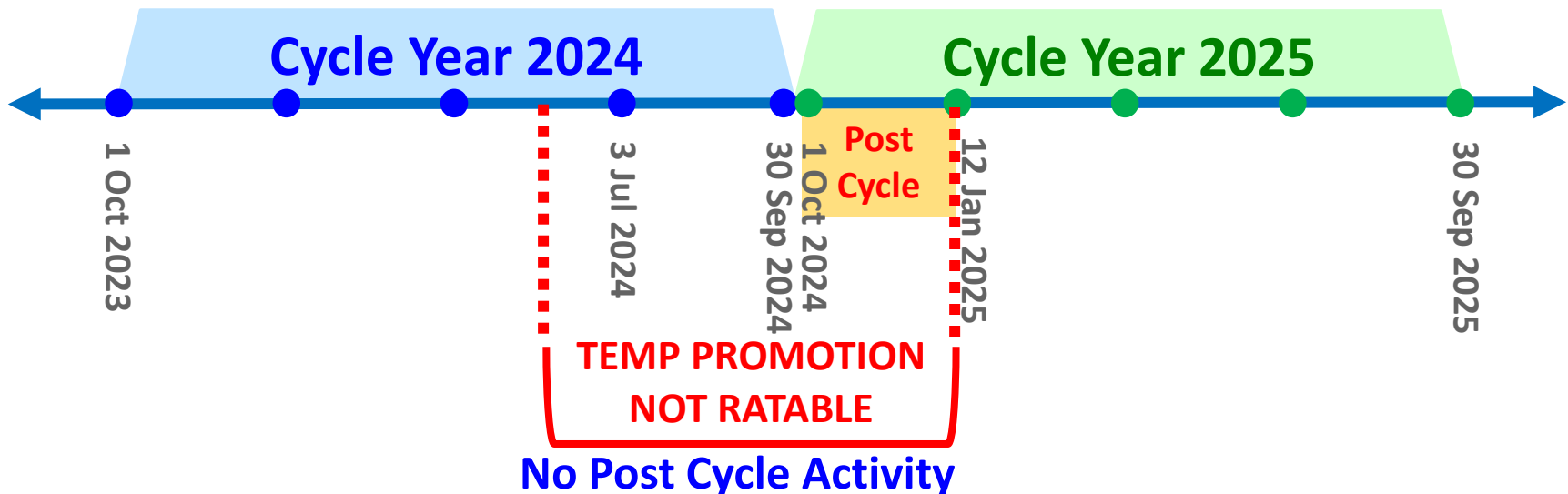
Post Cycle Activities - Temporary Promotions

- Temporary Promotions that started after 3 Jul 2024 and extending beyond 12 Jan 2025:
 - In the User Profile, add a Post Cycle Activity - Temporary Promotion
 - User Profile should reflect the permanent 30 Sep 2024 data
 - Previous Cycle Data record should reflect the permanent 30 Sep 2024 data
 - Previous Cycle Data must match User Profile data



Post Cycle Activities - Temporary Promotions

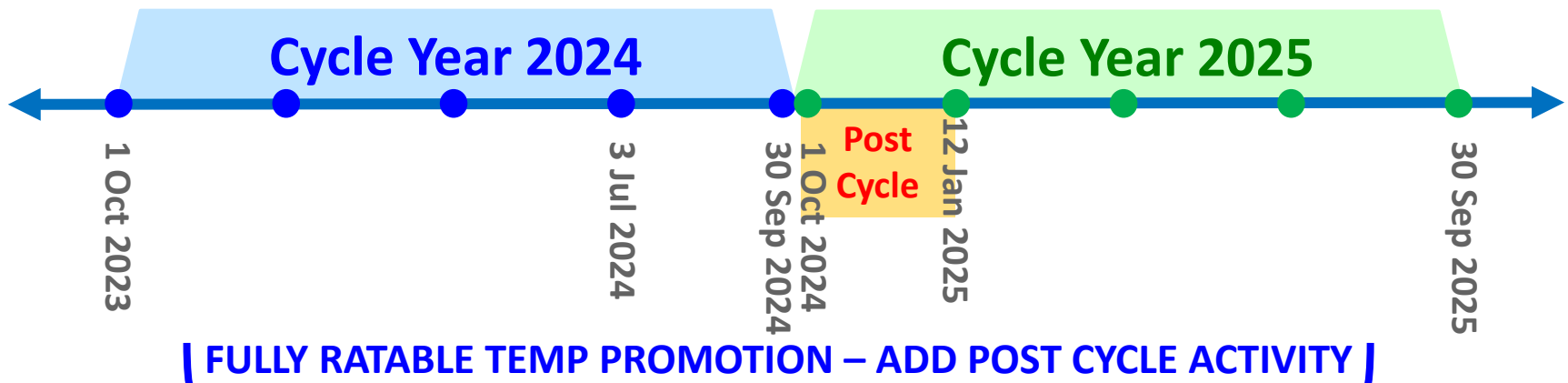
- Temporary Promotions starting on or before 3 Jul 2024 and ending before 12 Jan 2025:
 - Post-Cycle Activity NOT required
 - No promotion should be entered in CAS2Net
 - Previous Cycle Data should reflect 30 Sep information (permanent position)
 - Previous Cycle Data must match User Profile data



Post Cycle Activities

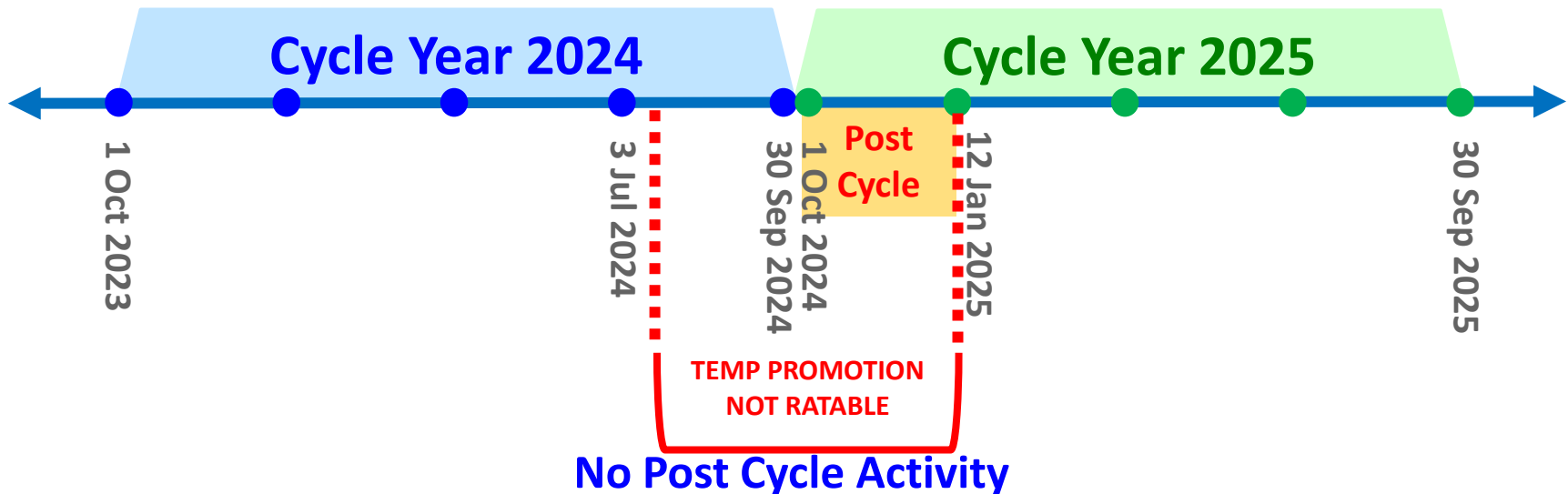
- Fully Ratable Temporary Promotions

- Fully Ratable Temporary Promotions that started on or before 3 Jul 2024 and extending beyond 12 Jan 2025:
 - In the User Profiles, the DCPDS CAS2Net discrepancy process will automatically create a Post Cycle Activity for Fully Ratable Temporary Promotions
 - Validate and update as necessary.
 - User Profile should reflect the fully ratable temporary promotion data
 - Previous Cycle Data record should reflect the fully ratable temporary promotion information



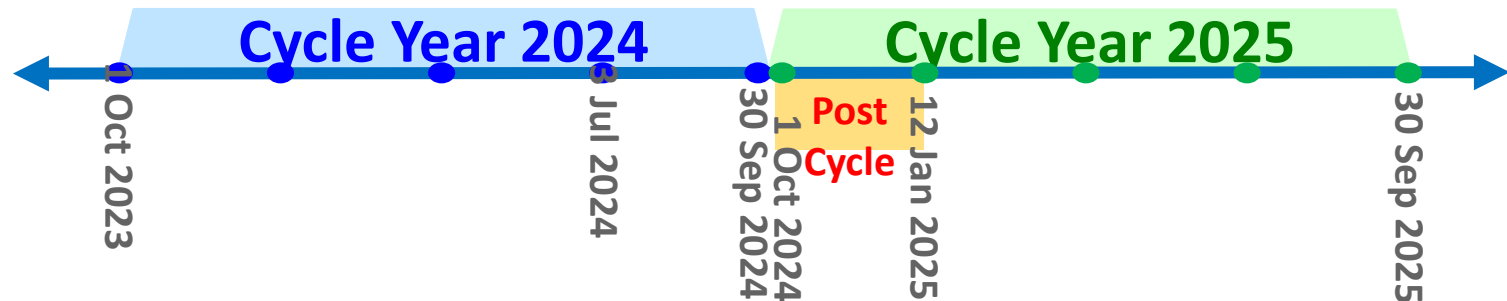
Post Cycle Activities - Non Ratable Temporary Promotions

- Non Ratable Temporary Promotions that started after 3 Jul 2024 but ending on or before 12 Jan 2025:
 - Post-Cycle Activity **NOT** required
 - User Profile should reflect the permanent 30 Sep data
 - Previous Cycle Data record should reflect the permanent 30 Sep data
 - Previous Cycle Data must match User Profile data



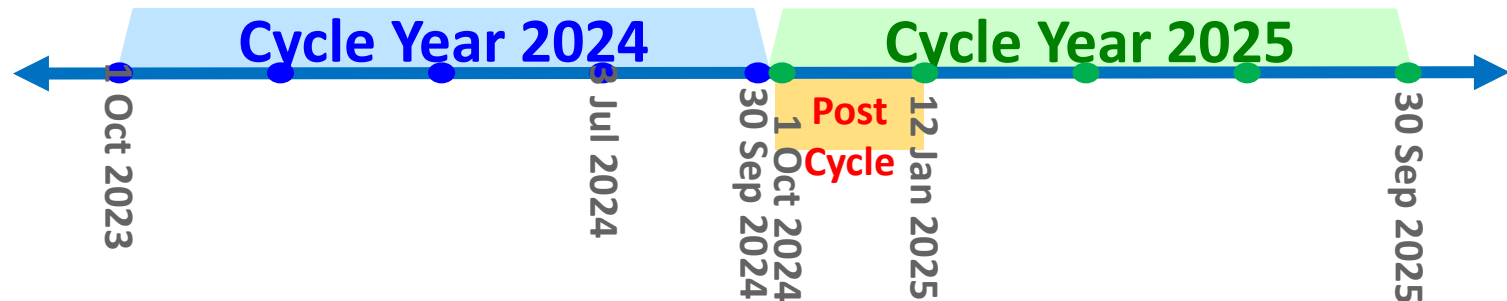
Post Cycle Activities – Change to Lower Broadband

- Change to Lower Broadband level on or before to 30 Sep 2024:
 - No post-cycle activity
 - Previous Cycle Data should match User Profile
- Change to Lower Broadband level after 30 Sep 2024:
 - In the User Profile, add a Post Cycle Activity
 - Previous Cycle Data record should reflect 30 Sept information



Post Cycle Activities – Change to Lower Broadband

- Change to Lower Broadband level on or before to 30 Sep 2024:
 - No post-cycle activity
 - Previous Cycle Data should match User Profile
- Change to Lower Broadband level after 30 Sep 2024:
 - In the User Profile, add a Post Cycle Activity
 - Previous Cycle Data record should reflect 30 Sept information



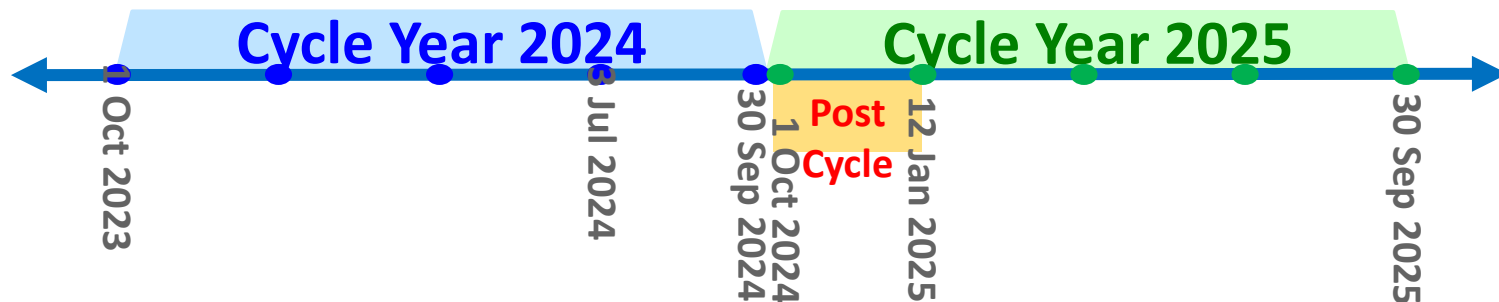
Post Cycle Activities – ACDP and CMS

- 30 Sep 2024 – Basic Pay is \$60,000
- Effective 3 Nov 2024
 - Basic Pay with 10% ACDP increase = \$66,000
 - DCPDS basic pay = \$66,000
 - CAS2Net User Profile MUST HAVE a Post Cycle Activity
- CMS basic pay has \$60,000
- Computed CRI \$2,500
- Computed CA \$3,000
- Options on Computed CRI (IAW component/command/pay pool business rules)
 1. No action, **allow Computed CRI as Approved CRI**
 2. CMS Data Column Roll CRI to CA? - **Override CRI and rollover as a Carryover Award** (Carryover Award \$2,500 and CA \$3,000)
 3. CMS Data Column CRI Override? - **Cancel CRI**

If Option 1, DoD PMO for the January pay transaction will add the Approved CRI to the 3 Nov 2024 ACDP ... **Basic Pay** \$66,000 plus **\$990 (1.5% GPI)** plus **\$2,500 (Approved CRI)** = \$69,490 effective 12 Jan 2025

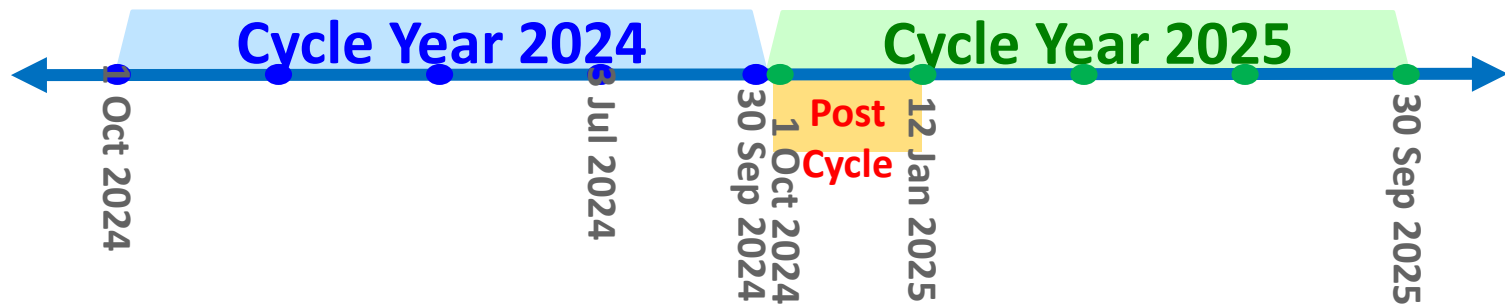
Post Cycle Activities – Retirement

- Retirement before 30 Sep 2024:
 - No post-cycle activity
 - Archive user profile
 - No Previous Cycle Data
- Retirement on 30 Sep 2024 (still on the rolls as of 11:59 PM 30 Sep):
 - No post-cycle activity
 - Previous Cycle Data record should reflect 30 Sep information
 - Archive user profile
- Retirement after 30 Sep 2024:
 - In the User Profile, add a Post Cycle Activity – Retirement with effective date of retirement
 - Previous Cycle Data record should reflect 30 Sep information
 - Archive user profile



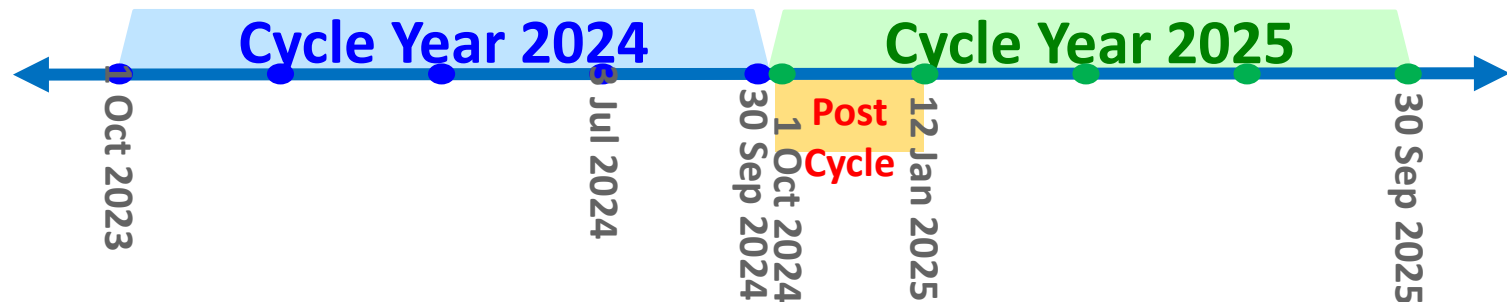
Post Cycle Activities – Separation

- Separation before 30 Sep 2024:
 - No post-cycle activity
 - Archive user profile
 - No Previous Cycle Data
- Separation on 30 Sep 2024 (still on the rolls as of 11:59 PM 30 Sep):
 - No post-cycle activity
 - Previous Cycle Data record should reflect 30 Sep information
 - Archive user profile
- Separation after 30 Sep 2024:
 - In the User Profile, add a Post Cycle Activity – Separation/Reassignment out of AcqDemo with effective date of action
 - Previous Cycle Data record should reflect 30 Sep information
 - Archive user profile



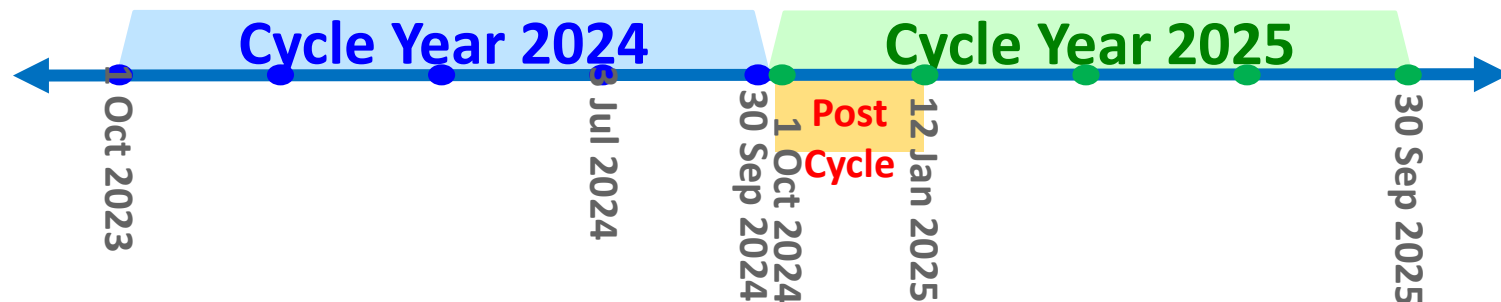
Post Cycle Activities – Death of Employee

- Death of an Employee on or before to 30 Sep 2024:
 - No post-cycle activity
 - Archive User Profile
 - No Previous Cycle Data
- Death of an Employee after 30 Sep 2024:
 - In the User Profile, add a Post Cycle Activity
 - Archive User Profile
 - Previous Cycle Data record should reflect 30 Sept information
 - Employee is eligible for the CCAS annual assessment. Any approved CRI should be rollover to CA for the pay transactions. **Pay transactions on losses will be provided to the regional pay offices.** DFAS will process the approved CA and Carryover to CA for payment to the employee's estate.



Post Cycle Activities – Leave Without Pay (LWOP)

- Leave without pay (LWOP) is a temporary non-pay status and absence from duty
 - Eligible for a CCAS annual assessment.
 - Have a User Profile as long as the employee is in AcqDemo, add a Post Cycle Activity.
 - Have a Previous Cycle Data record as long as the employee is on the rolls in AcqDemo on 30 Sep.
 - If the AcqDemo employee is on the rolls and on LWOP status on the effective date of the CCAS payout, subject to local business rules, any approved CA and Carryover Award will be paid to the employee and the new basic pay/adjusted basic pay will be paid upon return to an AcqDemo pay status.



CAS2Net and CCAS End of Cycle

- **Tuesday 1 October 2024**
 - End of Cycle Modules
 - Appraisal Status
 - Offline Interface
 - Previous Cycle Data
 - Sub-Panel Meeting
 - CMS Online
 - Macro-Free CMS/Subpanel Interface
 - Pay Pool Notices
 - 2024 Sub-Panel Meeting Spreadsheet
 - 2024 Compensation Management Spreadsheet (CMS)
 - 2024 Pay Pool Analysis Tool (PPAT)
 - AcqDemo web site
 - 2024 Sub-Panel Spreadsheet User Guide
 - 2024 CMS User Guide
 - 2024 PAT User Guide

End of Cycle Key Dates

OCT	20	1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19	NOV	22	1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16	DEC	24	1 2 3 4 5 6 7 8 9 10 11 12 13 14	JAN	26	1 2 3 4 5 6 7 8 9 10 11
	21	20 21 22 23 24 25 26 27 28 29 30 31		23	17 18 19 20 21 22 23 24 25 26 27 28 29 30		25	15 16 17 18 19 20 21 22 23 24 25 26 27 28		01	12 13 14 15 16 17 18 19 20 21 22 23 24 25
							26	29 30 31			26 27 28 29 30 31

2024 End of Cycle Timeline			
Day	Date	Event	Action By
Tuesday	1-Oct-24	CAS2Net activates end-of-cycle modules: Appraisal Status, Offline Interface and Previous Cycle Data, Sub-Panel Meeting, CMS Online, Macro-Free Sub-Panel Meeting, Macro-Free CMS	PMO
		Pay Pool Notices with 2024 Macro-Enabled Sub-Panel Meeting Spreadsheet, 2024 Macro-Enabled CMS, and 2024 Macro-Enabled Pay Pool Analysis Tool	PMO
Thursday	21-Nov-24	Pay Pool Notices with Not Final Reports / Data Complete Reports	PMO
Friday	13-Dec-24	Initial Upload **subject to component/command earlier initial upload date**	Pay Pool Administrators
Wednesday	8-Jan-24	Final Upload **subject to component/command earlier initial upload date**	Pay Pool Administrators
Sunday	12-Jan-25	First full pay period in January (12 Jan to 25 Jan)	
Friday	17-Jan-25	Pay Pools completed	PMO
Tuesday	21-Jan-25	Pay transactions posted to regional pay offices	PMO

2024 Open Forum Schedule

- ✓ 04 January, 1pm – 2:30pm ET: CCAS Pay Transactions for Regional Pay Offices
- ✓ 01 February, 1pm – 2:30pm ET: CCAS Grievance and Archive/Transfer
- ✓ 07 March, 1pm – 2:30pm ET: Assigning Mandatory Objectives, Mid-Point Review, Additional Feedback, and Closeout Assessment
- ✓ 04 April, 1pm – 2:30pm ET: Communicating with AcqDemo Program Office on CAS2Net and CCAS Issues
- ✓ 02 May, 1pm – 2:30pm ET: Reports – FY-based Reports & Current Settings Reports
- ✓ 06 June, 1pm – 2:30pm ET: Macro Free Sub Panel Spreadsheet and Compensation Management Spreadsheet (CMS) Introduction
- ✓ 11 July, 1pm – 2:30pm ET: Creating Sub-Organization Levels and Assigning Sub-Panel Managers, and User Role Assignments
- ✓ 01 August, 1pm – 2:30pm ET: CCAS Spreadsheet Test Schedule (Offline Sub-Panel Meeting Spreadsheet, Offline CMS, Macro Free versions, and CAS2Net Online versions)
- ✓ 05 September, 1pm – 2:30pm ET: Post Cycle Modules (Appraisal Status, Offline Interface, Previous Cycle Data, Sub-Panel Meeting and CMS Online)
- ✓ 12 September, 1pm – 2:30pm ET: Transfer, Archive and Post Cycle Activities
 - 19 September, 1pm-2:30pm ET: CAS2Net Sub-Panel Meeting and CMS Online
 - 26 September, 1pm-2:30pm ET: Macro Free Sub Panel Spreadsheet and Macro Free CMS
 - 03 October, 1pm-2:30pm ET: Discrepancy Reports
 - 10 October, 1pm-2:30pm ET: Lock/Unlock Supervisor 1, Sub-Pay Pool and Pay Pool
 - 17 October, 1pm-2:30pm ET: Pay Pool Analysis Tool (PAT)
 - 07 November, 1pm-2:30pm ET: Initial and Final Upload
 - 21 November, 1pm-2:30pm ET: Not Final Reports and Data Complete Reports
 - 05 December, 1pm-2:30pm ET: Grievance/Grievance Window

Open Forum Questions?

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