Advanced Features of CMS Spreadsheets for Pay Pool Administrators

DoD Civilian Acquisition Workforce Personnel Demonstration Project (AcqDemo)

Presented by the AcqDemo Program Office

Administration, Expectations, and Parking Lot

- Administration
  - Sign in
  - Course timing
  - Introductions
  - Expectations
  - Parking Lot

- Ground Rules and Logistics
  - Mute computer and/or phone as needed
  - Do not place your phone on hold if receiving training via VTC
  - Breaks

- Questions and Parking Lot review

Course Objectives

At the completion of this course, participants will:

- Understand the options available on the Parameters Tab
- Learn how to use the tools available on the CMS spreadsheet to adjust compensation
  - CA Proration, CRI & CA Overrides, Rollover CRI to CA, Discretionary Pay, Split % to Basic Pay
- Learn to how to deal with common issues that will affect your pay pool results
- Understand some common anomalies to look for in your pay pool results

~Note~
This course goes through many options for the CMS Spreadsheet that your pay pool may or may not be using. Consult your pay pools business rules for proper use of any of these features.

Pay Pool Process

Compensation Management Process

Compensation Management Process

Phase 1 – Recertify Sub Pay Pool Results

This first phase is necessary if the Pay Pool has Sub Pay Pools.
If a Pay Pool has no Sub Pay Pools, you would follow the Sub Pay Pool process to certify the scores. Since this is the first time that all the employees' scores have been brought together, the pay pool needs to certify that contributions are being valued equally across the pay pool. This is done by comparing the value of contributions assigned by scores from various sub pools.
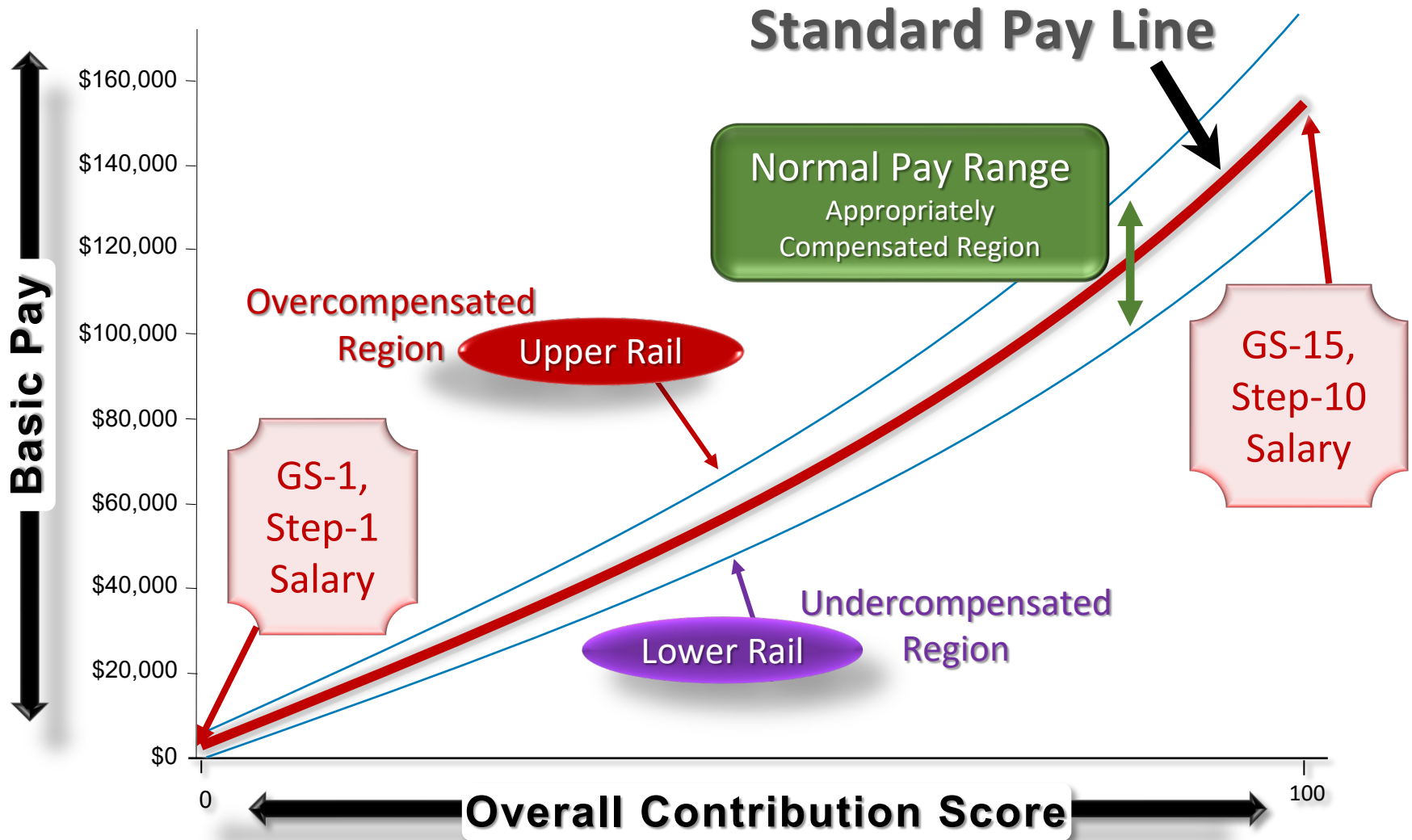
Phase 2 – Make Compensation Adjustments

Once the scores have been certified, we then look at the payout results. The Pay Pool must now consider their compensation strategy when making decisions for individual compensation. Is an employee rising too fast through their salary range? Should some of the employee's CRI be forcibly rolled over to CA? Is the compensation enough to retain and motivate the employee? If used, do Cash Differentials need to be adjusted?

It is important to know what compensation options are available in your business rules and compensation strategy.
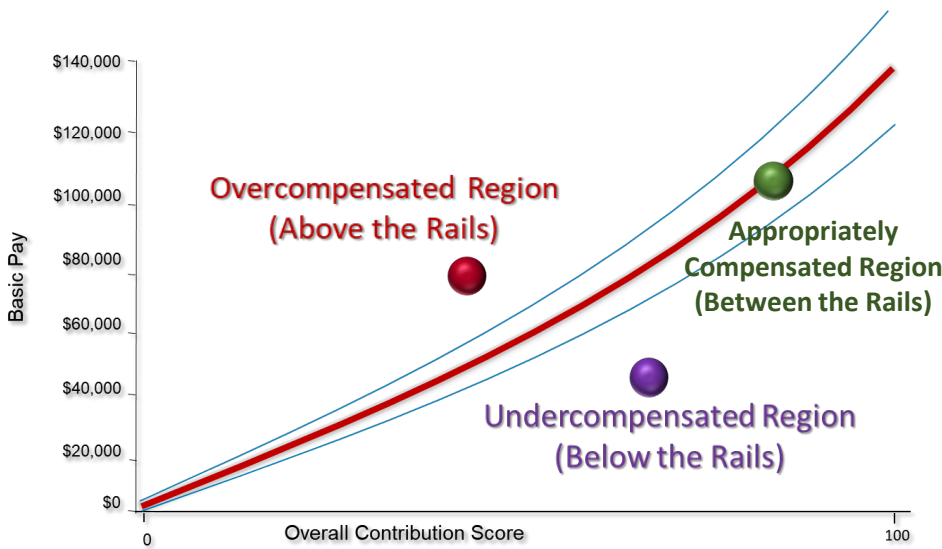
The Integrated Pay Schedule – The "Rails"

Standard Pay Line

Basic Pay (vertical axis)

- $160,000
- $140,000
- $120,000
- $100,000
- $80,000
- $60,000
- $40,000
- $20,000
- $0

Normal Pay Range Appropriately Compensated Region

Overcompensated Region — Upper Rail

GS-1, Step-1 Salary

GS-15, Step-10 Salary

Undercompensated Region — Lower Rail

Overall Contribution Score

0 — 100

CCAS Payout Criteria

Compensation Category	General Pay Increase	Contribution Rating Increase	Contribution Award	Locality Pay
Overcompensated	Can be given in full, reduced or denied	No	No	Yes
Undercompensated	Yes	Yes – up to 20%	Yes	Yes
Appropriately Compensated	Yes	Yes – up to 6%	Yes	Yes

Overcompensated Region (Above the Rails)

Appropriately Compensated Region (Between the Rails)

Undercompensated Region (Below the Rails)

Basic Pay — Overall Contribution Score

Payout Considerations
- Available funding guides pay decisions
- Total Adjusted Pay may not exceed Executive Level IV
- CRI increases may not exceed max pay for current broadband
- CRI increases > 20% and CAs > $10,000 require local commander's approval
- Intent of AcqDemo is to appropriately compensate all employees

Example of Delta OCS and Delta Pay

2023 Performance Details	PAQL
Factors Job Achievement and/or Innovation	5
Communication and/or Teamwork	3
Mission Support	3
Average Raw Score	3.7
Performance Rating of Record	3

2023 Contribution Details	Cat Score	Num Score
Factors Job Achievement and/or Innovation	3H	79
Communication and/or Teamwork	3M	76
Mission Support	3M	77
Overall Contribution Score		**77**
Expected Contribution Score		75
Expected Contribution Range		72-79

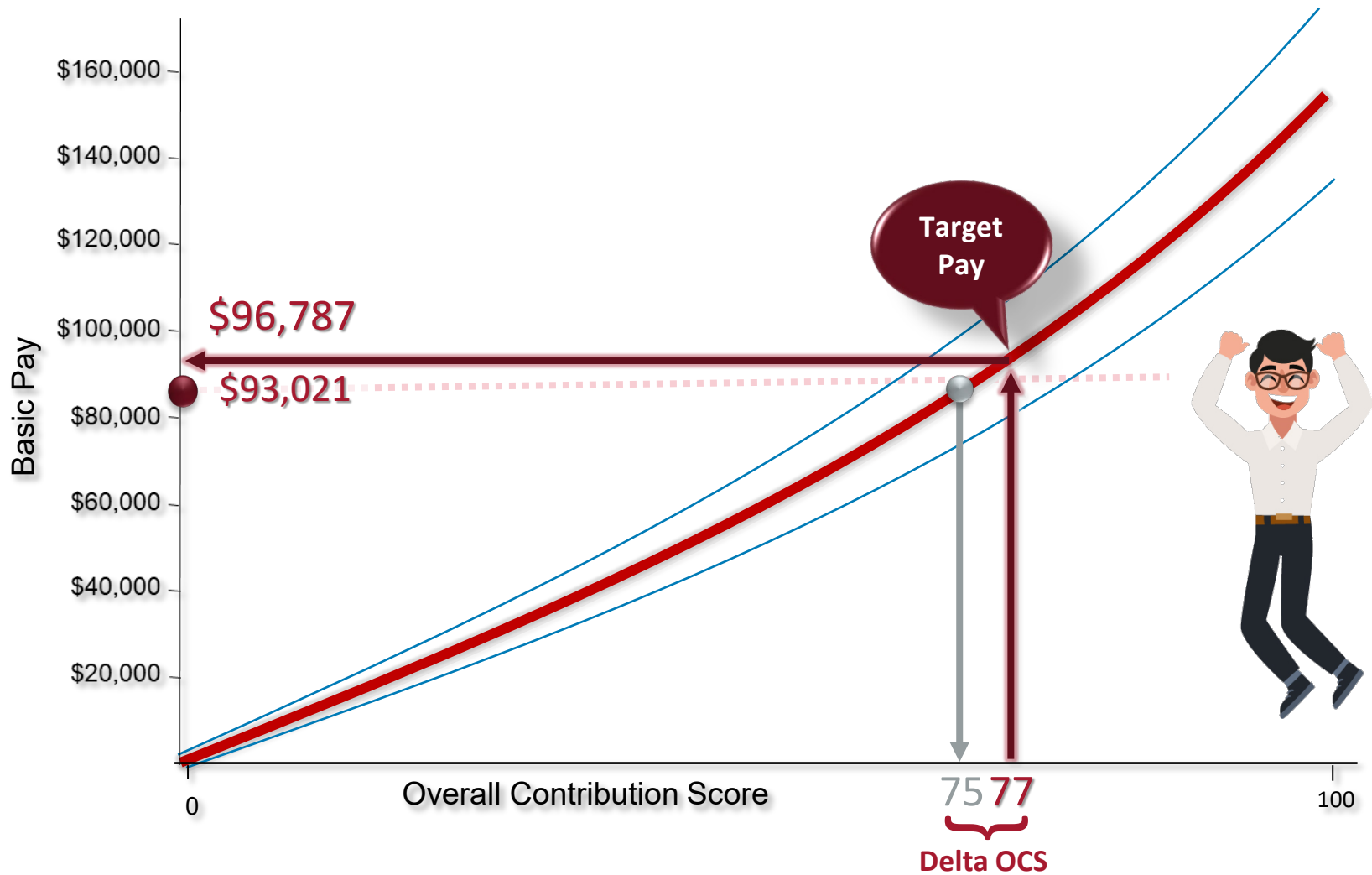| Employee Name	Expected OCS	Approved OCS	Delta OCS	Current Basic Pay	CRI Target Pay	CRI *Positive* Delta Pay
Contributor, Joe	75	77	2	$93,021	$96,787	$3,766

➤ Delta Pay is the difference between the current basic pay and the basic pay that corresponds with the approved Overall Contribution Score (OCS)

How much of the $3,766 will the employee actually get?
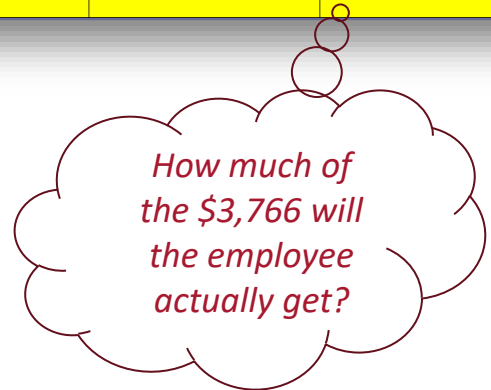
An increase of $3,766 would match compensation to contribution.

Delta OCS and Delta Salary

Basic Pay (y-axis): $20,000 / $40,000 / $60,000 / $80,000 / $100,000 / $120,000 / $140,000 / $160,000

Overall Contribution Score (x-axis): 0 ... 75 77 ... 100

$96,787

$93,021

Target Pay

Delta OCS

An increase of $3,766 would match compensation to contribution.

Pay Pool Funding

Contribution Rating Increase (CRI)

· Intended to be consistent with funds historically spent in GS on within-grade increases, quality-step increases and promotions between grades that are now banded

· Minimum not less than 2% of activity's basic pay – maximum set by DoD Program Manager annually

General Pay Increase (GPI)

· The across-the-board basic pay increase authorized by law or the President for the GS pay system. Funds allocated for the GPI that are not awarded will be transferred to the CRI Fund.

Contribution Awards (CA)

· Intended to be consistent with funds historically spent in GS on performance awards

· Minimum not less than 1% of activity's total adjusted pay – maximum set by DoD Program Manager annually

· 10% of organization's total awards budget is automatically withheld for Special Act and On-the-Spot awards distribution throughout the appraisal cycle.

Payout Calculations

- Determine who is in the Pay Pool as of the end of the rating period on September 30th

Employee	Basic Pay	Adjusted Basic Pay
Contributor, Joe	$93,021	$108,369
Sayers, Rose	$89,401	$104,152
Collins, James	$89,401	$104,152
Blaine, Rick	$77,806	$90,644
Wayne, Bruce	$77,806	$90,644
Munroe, Cora	$73,309	$85,405
	$500,745	**$583,366**

➥Total the Basic Pay column for use in CRI calculations.

➥Total the Adjusted Basic Pay column for use in CA calculations

Note: Adjusted Pay example above reflects RUS locality rate.
Adjusted pay will vary by locality.

Pay Pool Funds

- Calculate pay pool dollars allocated for basic pay increases (CRI) using percentages of Total Basic Pay and awards (CA) using percentages of Total Adjusted Basic Pay.
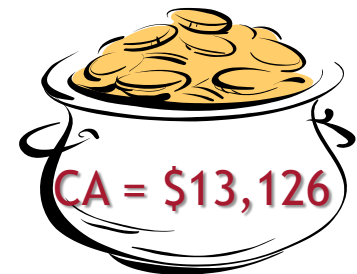 *The minimum funding level for CRI is 2.0% and CA is 1.0%.*
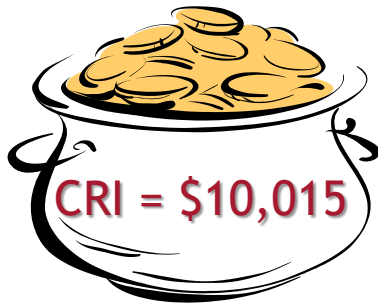
CRI = $10,015

Total Basic Pay x CRI Funding Level = CRI Pot

$500,745 x 2.0% = $10,015

Total Adjusted Basic Pay x CA Funding Level = CA Pot

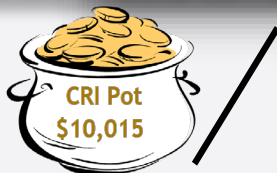**$583,366 x 90% of 2.5% = $13,126**

CA = $13,126

Payout Calculations - CRI

- Enter approved OCS and Target Pay

- Determine the Delta OCS and Delta Pay

- Consult Business Rules for Contribution Award payout eligibility

  - e.g., CRI eligibility is below the Standard Pay Line (SPL)

Employee Name	Expected OCS	Approved OCS	Delta OCS	Current Basic Pay	CRI Target Pay	CRI *Positive* Delta Pay
Contributor, Joe	75	77	2	$93,021	$96,787	$3,766
Sayers, Rose	73	67	-6	$89,401	$79,366	($10,036)
Collins, James	73	73	0	$89,401	$89,401	$0
Blaine, Rick	66	68	2	$77,806	$80,956	$3,150
Wayne, Bruce	66	65	-1	$77,806	$76,277	($1,529)
Munroe, Cora	63	67	4	$73,309	$79,366	$6,056
						$12,973

Available Dollars for CRI ÷ Total Positive Delta Pay = Percent for CRI Payout

CRI Pot $10,015

Total Positive Delta Pay of **$12,973**

$10,015 ÷ $12,973 = 77.1996% of Positive Delta Pay for CRI

~ N o t e ~
For our example we are using the standard Pay Line (SPL) as our payout rail for CRI.

Payout Calculations - CA

- Enter approved OCS and Target Pay
- Determine the Delta OCS and Delta Pay
- Consult Business Rules for Contribution Award payout eligibility

Employee Name	Expected OCS	Approved OCS	Delta OCS	Current Basic Pay	CA Target Pay	CA *Positive* Delta Pay
Contributor, Joe	75	77	2	$93,021	$104,530	$11,509
Sayers, Rose	73	67	-6	$89,401	$85,715	($3,686)
Collins, James	73	73	0	$89,401	$96,553	$7,152
Blaine, Rick	66	68	2	$77,806	$87,433	$9,627
Wayne, Bruce	66	65	-1	$77,806	$82,380	$4,573
Munroe, Cora	63	67	4	$73,309	$85,715	$12,406
Available Dollars for CA ÷ Total Positive Delta Pay = <u>Percent for CA Payout</u>						$45,267

CA Pot $13,126

Total Positive Delta Pay of **$45,267**

$13,126 ÷ **$45,267** = **28.9963%** of Positive Delta Pay for CA

~ *N o t e* ~
For our example we are using the Upper Rail (UR) as our payout rail for CA.

Calculate Approved CRI and CA

Employee Name	Expected OCS	Approved OCS	Delta OCS	Basic Pay	Target Pay	*Positive* Delta Pay	Approved Payouts	
Contributor, Joe	75	77	2	$93,021	$96,787	$3,766	$2,907	CRI
						$11,509	$3,337	CA

CRI Delta Pay * Percent of Delta Pay for CRI = Contribution Rating Increase

$3,766   X   **77.1996%**   = $2,907

CA Delta Pay * Percent of Delta Pay for CA = Contribution Award

$11,509   X   **28.9963%**   = $3,337

Pay Pool Payouts

Employee Name	Expected OCS	Approved OCS	Delta OCS	Current Basic Pay	CRI Target Pay	CRI *Positive* Delta Pay	Computed CRI	CA Target Pay	CA *Positive* Delta Pay	Computed CA
Contributor, Joe	75	77	2	$93,021	$96,787	$3,766	$2,907	$104,530	$11,509	$3,337
Sayers, Rose	73	67	-6	$89,401	$79,366	($10,036)	$0	$85,715	($3,686)	$0
Collins, James	73	73	0	$89,401	$89,401	$0	$0	$96,553	$7,152	$2,074
Blaine, Rick	66	68	2	$77,806	$80,956	$3,150	$2,432	$87,433	$9,627	$2,791
Wayne, Bruce	66	65	-1	$77,806	$76,277	($1,529)	$0	$82,380	$4,573	$1,326
Munroe, Cora	63	67	4	$73,309	$79,366	$6,056	$4,676	$85,715	$12,406	$3,597
						$12,973	77.1996%		$45,267	28.9963%
							$10,015			$13,126

All the CRI and CA Pay Pool dollars are distributed!!!

Over time, positions reach a plateau where basic pay growth levels off - some at the top of the position's basic pay range and others at various points within that range due to an employee's contribution and the difficulty, scope and value of a position.

End-of-Cycle Discussion – Part I Form

Identifying info →

Signatures →

Appraisal Details →

Part I: CCAS Salary Appraisal Form

Name:	Joe Contributor	**Series:**	0801		**Appraisal Period:**	
CAS2Net ID:	31	**Broadband Level:**	III		From:	1-Oct-22
Organization:	AMC/LHBB	**Retained Pay:**	No		To:	30-Sep-23
Career Path:	NH	**Presumptive:**	None			

Approved By: Bob Arnold, Pay Pool Manager   **Effective Date of Appraisal: January 1, 2024**

Discuss evaluation with employee and obtain signature confirming discussion. Signature of employee does not constitute agreement with CCAS appraisal.

_____   _____
Supervisor Print/Sign   **Date**

_____   _____
Supervisor Print / Sign   **Date**

2023 Performance Details	PAQL		2023 Contribution Details	Cat Score	Num Score
Job Achievement and/or Innovation	5		Job Achievement and/or Innovation	3H	79
Communication and/or Teamwork	3		Communication and/or Teamwork	3M	76
Mission Support	3		Mission Support	3M	77
			Overall Contribution Score		**77**
Average Raw Score	3.7		Expected Contribution Score		75
Performance Rating of Record	3		Expected Contribution Range		72-79

(Factors)

End-of-Cycle Discussion – Part I Form

Compensation Detail

	$93,021	Current Rate of Base Pay as of 30 Sep 2023	
+	$ 1,302	General Pay Increase	1.4%
+	$ 2,907	CRI (Salary Increase)	3.13%
=	**$97,230**	**New Rate of Basic Pay**	
+	$ 16,043	Locality Pay	16.50%
=	**$113,273**	**New Total Salary**	
	$ 3,337	Contribution Award	
+	$ -	Carryover from CRI)	
=	$3,337	Total Award	

2024 Expected Contribution Level

Expected Overall Contribution Score	76
Expected Contribution Range	73-80

Employee Compensation Region Chart

The graph plots the employee's current basic pay versus the final OCS relative to the rails and standard pay line (SPL); relating contribution to compensation. The top and bottom lines are the Upper and Lower Rails, respectively. The middle line is the SPL. Above the Upper Rail is the Overcompensated (Zone A). Undercompensated (Zone B) is below the Lower Rail. Appropriately Compensated (Zone C) is on or within the rails. Compensation regions determine the eligibility for basic pay increases and awards. The point on the graph below is the employee's appraisal results.

Remarks

*Basic pay on 30 September and does not include any promotion increase, temporary promotion increase, or ACDP basic that was approved o/a 1

Privacy Act Statement (552a of 5 U.S.C.)
1. AUTHORITY: Section II.D, Federal Register Notice dated November 9, 2017.
2. PURPOSE: This form summaries the annual evaluation of an employee's contribution and performance through the CCAS assessment.
3. ROUTINE USE: This form is a computer-generated form that is produced for each employee and contains the overall contribution score, performance rating of record and space for the signature of the supervisor, and the employee. The original of this form will be maintained in CAS2Net for no more than 4 years IAW 5 CFR Section 293.402 and in accordance with agency procedures.
4. DISCLOSURE: The information contained within this form is personal in nature and is restricted to those with appropriate permissions. Information collected on this form may be used for statistical and impact analysis.

Compensation Detail

Remarks

Questions? – Concerns? – Thoughts?

CMS Spreadsheet Section Overview

CMS Introduction

Compensation Management Spreadsheet (CMS)

- Has almost all the same functions and add-ins as Sub Panel Spreadsheet
  - **Does not have the <u>Group into Categories Tool</u>**

- Adds new features
  - CRI and CA overrides
  - CRI to CA rollover
  - Discretionary Pay
  - Control Points

- Adds new sections
  - General Pay Increase (GPI)
  - Contribution Rating Increase (CRI)
  - Locality Pay
  - Awards (CA)
  - Summary

- Adds new tabs
  - Parameters
  - New OCS
  - Summary

- Adds new modes
  - Grievance Mode
  - Ratable Promotion Mode

New Columns CMS 2023

- **Added column for EDIPI data**

The addition of the EDIPI column was added to facilitate the use of data available in DCPDS or other sources that use an employee's EDIPI number as an identifier.
This data can then be sorted by the EDIPI number for the pay pool and copied into a wild card column.

New Columns CMS 2023

- **Added next year's locality code for employees**

- **Added year to locality labels**

New Feature CMS 2023

- Added the ability to redistribute any remaining CRI dollars as part of the Award Pool.

		Cash Amount	Plus Unused GPI	
GPI (G)%		4.10	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.	
GS-1/step1 pay (24)	$	20,999		
GS-1/step1 pay (23)	$	20,172		

			Cash Amount	Plus Unused GPI	
CRI Funding %		2.40%	$915		☐ Check box if this is your organization's first cycle in AcqDemo
CRI Set-Aside ●% ○$		0.000%	$0	**Plus Unused CRI**	
Award Funding %		2.500%	$1,111	$200	☑ Check this box if you want to add CRI remainder to CA
Award Spent in CMS (<=90%)		90%	$1,000		
Non-CCAS Award for Remainder of FY		10%	$111		
Award Set-Aside ●% ○$		0.000%	$0		
Beta 1 (CRI)		1		Beta 1	1= Upper Rail
Beta 2 (Award)		1		1= Upper Rail	2% = 2% above SPL
Minimum CRI Dollar Amount		$0		0= SPL	1% = 1% above SPL

~*Note*~
Any unused CRI will be available as discretionary CRI, but if unused as discretionary will then be redistributed as part of the award pool.

TAB - Parameters

The Parameters Tab allows you to adjust how the CMS handles your pay pool funding and toggle the availability of some available options.

				Cash Amount	Plus Unused GPI	
7						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.
8	GPI (G)%		4.70			
9	GS-1/step1 pay (24)	$	21,986			
10	GS-1/step1 pay (23)	$	20,999			
12	CRI Funding %		2.000%	$311,744	$319,370	☐ Check box if this is your organization's first c
13	CRI Set-Aside ◉% ◎$		1.771%	$5,657		Max CR
14	Award Funding %		2.300%	$426,695 Plus Unused CRI		
15	Award Spent in CMS (<=90%)		90%	$384,026	$384,026	☐ Check this box if you want to add CRI remain
16	Non-CCAS Award for Remainder of FY		10%	$42,669		
17	Award Set-Aside ◎% ◉$		1.302%	$5,000		
18	Beta 1 (CRI)		0			
19	Beta 2 (Award)		1			
20	Minimum CRI Dollar Amount		$0			
21	Minimum CRI Carryover Amt		$0			
22	Minimum Award Dollar Amount		$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

24	GPI (G) Carry Over	$	7,626
25	CRI Remainder	$	17,785
26	Award Remainder	$	49,781
27	Alpha 1		1.0000
28	Alpha 2		0.2548
29	Minimum CRI Budget %		2.0
30	Minimum Award Budget %		1.0
31	Award Proration Plan	Automatic Redistribution in CMS
	TOA remainder	Available in CMS (as 2nd

-Note-

Your Pay Pool should develop business rules for how the options available on the Parameters Tab are to be used. Always consult your business rules before using any of the available options.

Contents | **Parameters** | Data | Matrix | Rails and RoR | Delta Stats | Delta Plot | Cur OCS | New OCS | Summary

*CMS = Compensation Management Spreadsheet

TAB – Parameters
CRI and CA Funding

The Parameters Tab allows you to adjust your pay pool's CRI and CA funding levels and provides the capability to set aside funds for discretionary purposes or adjust your CA funding to set aside more money to be awarded as Non-CCAS Awards.

You can toggle between setting aside funds for discretionary purposes as a percentage of total funds available or as a specific dollar amount. Any set-aside funds will then be available as discretionary $ to be distributed as the pay pool determines.

GS-1/step1 pay			$	20,999	Cash Amount	Plus Unused GPI
CRI Funding %				2.000%	$311,744	$319,370
CRI Set-Aside	○ %	◉ $		1.771%	$5,657	
Award Funding %				2.300%	$426,695	Plus Unused CRI
Award Spent in CMS (<=90%)				90%	$384,026	$384,026
Non-CCAS Award for Remainder of FY				10%	$42,669	
Award Set-Aside	○ %	◉ $		1.302%	$5,000	

While the maximum of available award funding you can spend in the spreadsheet is 90% (10% must be reserved for non-CCAS awards) you can choose to use an even lesser percentage to increase the amount of funds available as non-CASS awards.

TAB – Parameters

The Parameters Tab also has two check boxes available to toggle how the CMS handles CRI funds.

The first allows you to increase your pay pool's max CRI funding level from 2.40% to 2.50%. This option can only be used by organizations in their first AcqDemo cycle.

Unused GPI

$319,370 ☐ Check box if this is your organization's first cycle in AcqDemo

Max CRI 2.40%

Unused CRI

$384,026 ☐ Check this box if you want to add CRI remainder to CA

The second will take any CRI funds not distributed by the spreadsheet's algorithm or as discretionary CRI pay and add them to the CA award fund to be distributed by the spreadsheet's algorithm for CA.

TAB – Parameters

The Parameters Tab also lets you adjust how the CMS spreadsheets algorithm distributes the available funds.

To change the target pay used, you can choose the Beta you wish to change. A dropdown menu icon will appear that will allow you to select from the available payout options

Award Set Aside ☐ % ☐ $	1.302%
Beta 1 (CRI)	0
Beta 2 (Award)	1 ▾
Minimum CRI Dollar Amount	$0
Minimum CRI Carryover Amt	$0
Minimum Award Dollar Amount	$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

You can also set minimum amounts required for an employee to receive a payout from the spreadsheet's algorithm. If the algorithm doesn't calculate an amount for the employee equal to or greater than the minimum, it will then change the amount to $0 and redistribute the funds to employees receiving a payout.

~ N o t e ~
SPL will use a target pay of the value of an employee's OCS
Upper Rail will use a target pay 8% above the value of an employee's OCS
Lower Rail will use a target pay 8% below the value of an employee's OCS

TAB – Parameters

The Parameters Tab shows you what funds have not been distributed by the CMS spreadsheet's algorithm and the percentages used by the algorithm to allocate funds based on the difference between an employee's current pay and their OCS's target pay.

GPI (G) Carry Over	$	7,626
CRI Remainder	$	17,785
Award Remainder	$	49,781
Alpha 1		1.0000
Alpha 2		0.2548
Minimum CRI Budget %		2.0
Minimum Award Budget %		1.0

CRI Remainder is the total of CRI funds not allocated as CRI. This is not affected by adding CRI Remainder to CA

Award Remainder is a combination of both funds remaining as Discretionary Award and Secondary Discretionary Award

Alpha 1 is the payout percentage for CRI
Alpha 2 is the payout percentage for CA

TAB – Parameters

☑ Use Control Points	
☑ Show ACDP	
☑ Show Supervisor Differential	
☑ Use Time Off Award	

You can toggle which features you may need such as Control Points, ACDP employees, Team Lead/Supervisor Differentials, and Time Off Awards

Minimum CRI Budget %	2.0
Minimum Award Budget %	1.0
Award Proration Plan	Available in CMS (as 2nd Discretionary)
TOA remainder	Automatic Redistribution in CMS
	Available in CMS (as 2nd Discretionary)
	Don't spend in CMS (add to non-CCAS)

You can decide what to do with funds not spent due to Award Proration or from buying TOA hours with CA funds

Minimum CRI Budget %	2.0
Minimum Award Budget %	1.0
Award Proration Plan	Available in CMS (as 2nd Discretionary)
TOA remainder	Available in CMS (as 2nd Discretionary)
	Available in CMS (as 2nd Discretionary)
	Don't spend in CMS (add to non-CCAS)

˷ N o t e ˷
While three options (Automatic Redistribution in CMS, Available as 2nd Discretionary, and Don't spend in CMS add to Non-CCAS) are available for Award Proration. Automatic Redistribution in CMS is not an option for TOA remainder funds.

TAB – Parameters

The Parameters Tab shows you what funds have not been distributed by the CMS spreadsheet's algorithm and the percentages used by the algorithm to allocate funds based on the difference between an employee's current pay and their OCS's target pay.

CRI Remainder is the total of CRI funds not allocated as CRI. This is not affected by adding CRI Remainder to CA

Award Remainder is a combination of both funds remaining as Discretionary Award and Secondary Discretionary Award

Alpha 1 is the payout percentage for CRI
Alpha 2 is the payout percentage for CA

Spreadsheet Set-Up — Using Wildcard Columns

➤ Using wildcard columns to identify basic aggregate identifiers will facilitate custom data analysis in the spreadsheet

8 wildcard columns are available in the CMS

Wildcard 1 (Column J):	Pre-Scores section
Wildcard 2 (Column AV):	Scores Section
Wildcard 3 (Column AW):	Scores Section
Wildcard 4 (Column BW):	GPI Section
Wildcard 5 (Column DA):	CRI Section
Wildcard 6 (Column DX):	CA Section
Wildcard 7 (Column EB):	Summary Section
Wildcard 8 (Column EE):	Summary Section

~ T i p ~
Remember, Wildcard data survives the roundtrip, however formulas do not.

~ T i p ~
Wildcard headings can be Modified by clicking in the Row 9 heading box

Data Sheet - Shortcuts

Located in the top left section of the Data Sheet are Shortcuts. These will take you to the Contents Tab, Parameters Tab.
Also, those listed in the Goto area will take you to the Scores, GPI, CRI, or Awards sections of the Data Sheet.

Suggested Views (8 Views on CMS)

Columns Viewable		
Full View	All Columns	
Scores View	Last Name First Name Middle initial or Suffix (if needed) Career Path Broadband OCC Series Previous OCS Previous Rating of Record Start Date Position Start Date	1st Level Supervisor Sub Pay Pool Manager Categorical scores Final Scores PAQL Scores Expected OCS 2022 OCS Delta OCS Rating of Record Any Needed Wild Cards

Suggested Views (8 Views on CMS)

	Columns Viewable	
CRI Review	Last Name First Name Middle initial or Suffix (if needed) Career Path Broadband OCC Series Start Date Position Start Date CA Proration CRI Override CA Override Rollover CRI to CA 1st Level Supervisor Sub Pay Pool Manager Categorical scores	Final Scores Default CRI Discretionary CRI Computed CRI Split % to Salary Computed CRI % Control Point Approved CRI Carryover Award CY2024 Expected OCS 2023 Expected OCS 2023 OCS 2023 Delta OCS Approved CRI New Basic Pay Any Needed Wild Cards

Suggested Views (8 Views on CMS)

	Columns Viewable	
CA/TOA	Last Name First Name Middle initial or Suffix (if needed) Career Path Broadband OCC Series Start Date Position Start Date CA Proration Rollover CRI to CA	Rating of Record Discretionary CRI Carryover Award Computed Award Discretionary Award Requested % TOA Approved % TOA Time Off Hours Dollar Value Remaining Total Award
Cash Differentials	Last Name First Name Middle initial or Suffix (if needed) Career Path Broadband OCC Series 1st Level Supervisor Sub Pay Pool Manager Rating of Record	Computed CRI $ Split % to Salary Computed CRI % Approved CRI $ Supv/Team Lead Supervisor Differential Start Date Supervisor Differential Rate Supervisor Differential Amount New Supervisor Differential Rate New Supervisor Differential Amount

Tracking Panel Decisions – CA Proration

The percentage entered will be the percentage that remains in the employee's Computed CA

art Date	CA Proration	CRI Override?	CA	Rollover CRI to CA?	1st Level Sup Name	Sub-Meet
25-Nov-18	75%	0	0	1	LARRY LANG	MAN
19-Mar-17		0	0	1	DENISE CHOI	BOB
19-Mar-17		0	0	1	CAL COURIC	MAN

– N o t e –
CA Proration only affects the Computed CA. It will not affect any rollover CA.

CA Proration allows the Pay Pool Panel to reward only a percentage of an employee's Computed CA.

Pay Pool Panels may decide to do this in cases where employees have only worked for part of the year, to avoid double compensating for other performance awards given, or other reasons as described in the compensation strategy.

Any CA dollars removed through CA Proration will be distributed according to the parameters you have set.

Tracking Panel Decisions – CRI/CA Override

➤ CRI/CA Overrides are used when an employee listed in your spreadsheet will not participate in the payout

➥ Example – Retiring or going to a non-AcqDemo organization prior to the effective date of the payout

A "0" indicates they will be included in CRI and/or CA calculations.
A "1" indicates they will be removed from CRI and/or CA calculations.

Position Start Date	CA Proration	Post Cycle activity	CRI Override?	CA Override?	Rollover CRI to CA?	1st Level Sup Name	Sub-Pa Meetin
			0	1	0	ED MILLER	BOBBY
			0	0	1	ED MILLER	BOBBY
			0	0	1	ED MILLER	BOBBY
			0	0	1	ED MILLER	BOBBY
			0	0	1	ED MILLER	BOBBY
			0	0	1	BARRY BURNS	BOBBY
			0	0	1	BARRY BURNS	BOBBY
			0	0	1	BARRY BURNS	BOBBY
			0	0	1	BARRY BURNS	BOBBY
			0	0	1	DAVID KOOIMAN	BOBBY
			0	0	1	DAVID KOOIMAN	BOBBY
			0	0	1	DAVID KOOIMAN	BOBBY
			0	0	1	DAVID KOOIMAN	BOBBY
			0	0	1	DAVID KOOIMAN	BOBBY
			0	0	1	DAVID KOOIMAN	BOBBY
			0	0	1	LOUIS CHAREN	BOBBY
			0	0	1	LOUIS CHAREN	BOBBY

Tracking Panel Decisions – CRI Forced Rollover

Rollover CRI to CA? Should be set to "1" for most employees. Any employees who are making more than their control point value should be set to "2."

Last Name	First Name	Position Start Date	CA Proration	Post Cycle activity	CRI Override?	CA Override?	Rollover CRI to CA?	1st Level	Panel Managers Meeting	Pay Pool Manager Name	Part 1: Remarks
11 BIRD	BLU				0	0	2	AMERICAN ROBIN		PAY POOL MANAGER	
13 DOVE	MOURNING				0	0	1	ACDP SUPERVISOR	ACDP SUPERVISOR	PAY POOL MANAGER	
14 EAGLE	CRESTED				0	0	1	CDP SUPERVISOR	ACDP SUPERVISOR	PAY POOL MANAGER	
15 EMPLOYEE	ACDP				0	0			ACDP SUPERVISOR	PAY POOL MANAGER	
16 EMPLOYEE	ACDP 2				0	0			ACDP SUPERVISOR	PAY POOL MANAGER	
18 FALCON	PEREGRINE				0	0		CKER	DEWEY WOODPECKER	PAY POOL MANAGER	
19 FINCH	GOLD				0	0			AMERICAN ROBIN	PAY POOL MANAGER	
20 GRACKLE	COMMON	25-Apr-21			0	0			PAY POOL MANAGER	PAY POOL MANAGER	
21 JUNCO	DARKEYED				0	0	1	DEWEY WOODPECKER	DEWEY WOODPECKER	PAY POOL MANAGER	
22 MARTIN	PURPLE				0	0	1	ACDP SUPERVISOR	ACDP SUPERVISOR	PAY POOL MANAGER	
23 ROBIN	AMERICAN				0	0	1	PAY POOL MANAGER	PAY POOL MANAGER	
24 SPARROW											

Return to Main Menu
Edit Parameters
Set View
Goto
Scores   GPI
CRI   Awards
Blue arrows indicate fields set to filter the data.

Award Rollover
Please enter a 0 to disable Award Rollover, 1 to enable for employees at a pay cap, 2 to enable for employees not at a pay cap and 3 to rollover any discretionary CRI.

Rollover CRI to CA has 4 options:
Option 0 = no CRI will rollover to CA,
Option 1 = rollover CRI to CA when a Pay Cap has been reached
Option 2 = Rollover all CRI to CA
Option 3 = Roll over all discretionary CRI to CA

You can add remarks to an employees Pat I appraisal form. Some remarks are pre-populated, such as:
"Employee was approved for ## time off hours in lieu of Contribution Award. The remaining CA not converted to TOA hours is shown as contribution award."

	Last Name	First Name	Locality Rate	CY2021 Pay Used in CRI Calculations	Used in Award Funding Limitation	Previous OCS	Previous Rating of Record	Start Date	CA Proration	CRI Override?	CA Override?	Rollover CRI to CA?	1st Level Sup Name	Sub-Panel Managers Meeting	Pay Pool Manager Name	Part 1: Remarks
11	Sorenson	Sarah	16.51%	$77,235	$89,996	70	3	19-Mar-17		0	0	1	ED MILLER	BOBBY ELAM	JACK SMITH	
12	Fillippouli	Robin	16.51%	$81,119	$94,512	73	3	19-Mar-17		0	0	1	ED MILLER	BOBBY ELAM	JACK SMITH	
13	Giles	Aaron	16.51%	$79,111	$92,172	71	3	19-Mar-17		0	0	1	ED MILLER	BOBBY ELAM	JACK SMITH	
14	Lee	Tony	16.51%	$88,345	$102,931	78	3	19-Mar-17		0	0	1	ED MILLER	BOBBY ELAM	JACK SMITH	
15	Rook	Greg	16.51%	$75,606	$86,322	69	3	19-Mar-17		0	0	1	ED MILLER	BOBBY ELAM	JACK SMITH	
16	Lahren	John	16.51%	$78,871	$91,893	72	3	19-Mar-17		0	0	1	BARRY BURNS		JACK SMITH	
17	Hummer	Hershel	29.77%		$111,015	77	5	19-Mar-17		0	0	1			JACK SMITH	
18	Wallace	Juan	29.77%													
19	Case	Brian	16.51%													
20	Starr	Suzanne	16.51%													
21	Williams	Wilson	16.51%													
22	Tarman	Timothy	16.51%													
23	Carlson	Richard	16.51%													
24	Johnson	Jessica	16.51%													
25	Park	Julie	16.51%													
26	McKelway	Douglas	16.51%													
27	Berman	Mark	16.51%	$84,488	$98,435	74	3	19-Mar-17		0	0	1	LOUIS CHAREN	BOBBY ELAM	JACK SMITH	
28	Bruce	Kristin	16.51%	$81,067	$94,451	72	3	19-Mar-17		0	0	1	LOUIS CHAREN	BOBBY ELAM	JACK SMITH	
29	Miller	Karl	29.77%	$88,777	$115,206	77	3	19-Mar-17		0	0	1	FRANCIS FREEMAN	BOBBY ELAM	JACK SMITH	
30	Emerson	Erica	29.77%	$86,770	$112,601	76	3	19-Mar-17		0	0	1	FRANCIS FREEMAN	BOBBY ELAM	JACK SMITH	

_T i p_
The Part 1: Remarks, show up on the employee's Part 1, CCAS Salary Appraisal Form..
Part 1: Remarks can be a great place to include information such as reason for CRI to CA rollover (and what percentage), If an employee is moving into greater contribution expectations for their pay and contribution plans should be reviewed/revised, etc.

Data Sections – Scores

Added to the scores section on the CMS are a group of columns used by the spreadsheet to make the payout calculations

The Upper Rail (8% Higher) and Lower Rail (8% lower) values of the employee's OCS

The difference between the employee's current salary and the target pay for CRI and CA

The Target Pay for CRI (beta 1) and CA (beta 2) based on the Parameters Tab settings.

The delta pay value that will be used for computing the employee's calculated CRI and CA

	UR Pay	LR Pay	CRI Target Pay	CA Target Pay	Rail Pos (Final)	CRI Delta Y	CA Delta Y	CRI Pos Delta Y	CA Pos Delta Y	CY2024 Max for BB&CP
3	$79,049	$85,922	$92,796		C2	$1,428	$8,302	$1,428	$0	115,079
	9	$83,898	$91,193	$98,489	C2	$2,449	$9,745	$2,449	$9,744	
	,656	$80,633	$87,645	$94,656	C2	$1,099	$8,110	$1,099	$8,110	$115,
	104,530	$89,044	$96,787	$104,530	C2	$137	$7,880	$137	$7,880	$115,079
	$90,973	$77,495	$84,234	$90,973	C2	$1,302	$8,041	$1,302	$8,040	$115,079
	96	$79,049	$85,922	$92,796	C1	-$361	$6,513	$0	$6,513	$115,079
	6	$87,294	$94,885	$102,476	C2	$622	$8,213	$622	$8,213	$115,079
		$73,016	$79,366	$85,715	C2	$3,117	$9,466	$3,117	$9,465	$115,079
		$75,973	$82,579	$89,185	C2	-$713	$5,893	$0	$0	$115,079
	9	$83,898	$91,193	$98,489	C2	$2,009	$9,305	$2,009	$9,304	$115,079
	3	$74,480	$80,956	$87,433	C2	$1,719	$8,196	$1,719	$8,195	$115,079
5	$96,553	$82,249	$89,401	$96,553	C2	$3,500	$10,652	$3,500	$10,652	$115,079
3	$96,553	$82,249	$89,401	$96,553	C2	$2,080	$9,232	$2,080	$9,232	$115,079
3	$92,796	$79,049	$85,922	$92,796	C2	$1,005	$7,879	$1,005	$7,879	$115,079
3	$87,433	$74,480	$80,956	$87,433	C2	$105	$6,582	$105	$6,581	$115,079

CY 2023

Data Sections – Set GPI

The Set GPI section deals with the GPI portion of the annual pay adjustment. By default, everyone will receive the full GPI except for Retained Pay employees who will receive 50% GPI.
By default, employees in the "A" region will receive 0% GPI

The CMS defaults to denying employees in the A region any GPI. Depending on your business rules, you may need to add discretionary GPI. This can be done up to the employee's Max Discretionary Amount.

- N o t e -
Employees in the A region who are at the bottom of their broadband may need to have discretionary GPI added to keep them at the broadband minimum salary.

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2024 Broadband Minimums

Estimate based on 4.7% proposed GPI for 2024

Career Path/ Broadband	Minimum Salary 2024
All BB 1	$ 21,986
All BB 2	$ 33,878
NH 3	$ 74,441
NH 4	$ 104,604
NJ 3	$ 51,332
NJ 4	$ 74,441
NK 3	$ 46,476

Data Sections – Set CRI

The Set CRI section shows how the CRI is calculated. It is here you can add or subtract Discretionary Pay, use/modify Control Points, and/or see information affecting CRI payouts. This section will also show both ACDP information and allow you to adjust supervisor and team lead cash differentials.

Data Sections – Set CRI

You have a few options to adjust an employee's CRI, such as Discretionary CRI or Split % to Basic Pay.

Note
Discretionary CRI can be distributed as CA by setting rollover CRI to CA? to "3"

Available Balance shows how many discretionary dollars you have available. (When highlighted red, you have a negative balance.)

Default CRI is the amount of CRI calculated by the spreadsheet's algorithm

Computed CRI % is the percentage of the increase when compared to the employee's basic pay for the CY being rated

You can allocate additional CRI $ by using Discretionary CRI

Split % to Basic Pay allows you to give an employee only part of their CRI $, the remainder will rollover to CA. (Except when rollover is disabled.)

Computed CRI $ is the sum of the Default CRI and Discretionary CRI

	Total CRI			G carry-over=	$6,126.00
Default=	$301,585			CRI Budget =	$317,870.00
Discretionary=	$0			CRI Set Aside =	$5,657.00
Computed =	$301,585			Alpha1=	1.000000

| Available Balance= | $16,285.00 |

(Default CRI) Alpha1DeltaY	(PPM Input) Discretionary CRI	Computed CRI $	Split % to Basic Pay	Computed CRI %	Computed Basic Pay 2024	Max Allowable CRI %	Allow to exceed 20% limit	CY Pay
$0		$0		0.00%	$68,604	6.00%		
$1,428		$1,428	10%	1.69%	$89,894	6.00%		
$2,449		$2,449		2.76%	$95,364	6.00%		
$1,098		$1,098		.27%	$91,712	6.00%	0	
$137		$137		0.14%	$101,330	6.00%	0	
$1,302		$1,302		1.57%		6.00%	0	
$0		$0		0.00%	$90,333			
$622		$622		0.66%	$99,316			
$3,116		$3,116		4.09%	$82,949	6.00%		
$0		$0		0.00%	$87,207	0.00%		
$2,009		$2,009		2.25%	$95,385	6.00%		
$1,719		$1,719		2.17%	$84,681	6.00%		
$3,500		$3,500		4.07%	$93,439	6.00%		
$2,080		$2,080		2.38%	$93,506	6.00%		
$1,005		$1,005		1.18%	$89,914	6.00%	0	

Depending on an employees rating and what region of the rails diagram they would fall into, the spreadsheet will limit the amount of CRI they may receive. Any additional CRI will then be rolled over into CA. (Except when rollover is disabled.)

"Allow to exceed 20% limit," allows CRI % increases greater than 20%. (Requires approval from the head of participating organization.)

Max Allowable CRI % is the % cap that will be applied to Computed CRI $. The remainder will rollover to CA. (Except when rollover is disabled.)

Computed Basic Pay is the new basic pay of the employee if no pay is being split to CA, or being stopped by any time of pay cap.

Set CRI 2.00%		Total CRI				G carry-over=	$6,126.00
	Default=	$301,585				CRI Budget =	$317,870.00
	Discretionary=	$0				CRI Set Aside =	$5,657.00
	Computed =	$301,585				Alpha1=	1.000000

	Available Balance=	$16,285.00						
	(Default CRI) Alpha1DeltaY	(PPM Input) Discretionary CRI	Computed CRI $	Split % to Basic Pay	Computed CRI %	Computed Basic Pay 2024	Max Allowable CRI %	Allow to exceed 20% limit	CY Pa
	$0		$0		0.00%	$68,604	6.00%	0	
	$1,428		$1,428	10%	1.69%	$89,894	6.00%	0	
	$2,449		$2,449		2.76%	$95,364	6.00%	0	
	$1,098		$1,098		1.27%	$91,712	6.00%	0	
	$137		$137		0.14%	$101,330	6.00%	0	
					1.57%	$88,132	6.00%		
			$0		0.00%	$90,339	6.00%		
	$622		$622		0.66%	$99,316	6.00%		
	$3,116		$3,116		4.09%	$82,949	6.00%		
	$0		$0		0.00%	$87,207	0.00%		
	$2,009		$2,009		2.25%	$95,385	6.00%		
	$1,719		$1,719		2.17%	$84,681	6.00%		
	$3,500		$3,500		4.07%	$93,439	6.00%	0	
	$2,080		$2,080		2.38%	$93,506	6.00%	0	
	$1,005		$1,005		1.18%	$89,914	6.00%	0	

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You can also use control point to further limit basic pay increases

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"Split % to Basic Pay" allows you to forceably rollover a percentage of Computed CRI $ to CA. The Percentage you choose will be the percentage that remains as CRI. (e.g., if you want to rollover 60% of CRI to CA, enter 40%)
The remainder of the Computed CRI $ not used for Approved CRI $ will be moved to Carryover Award in the Set Award section

	Available Balance= $15,936.00								
(Default CRI) Alpha1DeltaY	(PPM Input) Discretionary CRI	Computed CRI $	Split % to Basic Pay	Computed CRI %	Control Point $	Max Basic Pay 2024	Approved CRI $	New Basic Pay 2024	Carryover Award
$1,428	$1,000	$2,428	50%	2.87%	$95,818	$89,680	$1,214	$89,680	$1,214
$2,449		$2,449		2.76%	$95,818	$95,818	$2,449	$95,364	$0
$1,098		$1,098		1.27%	$95,818	$95,806	$1,098	$91,712	$0
$137		$137		0.14%	$95,818	$106,992	$0	$101,193	$137
				1.57%	$95,818	$91,805	$1,302	$88,132	$0
				0.00%	$95,818	$95,515	$0	$90,339	$0
				0.66%	$95,81				

- N o t e -
You cannot do a 100% rollover with this method. You will need to set "Rollover CRI to CA" to "2" to achieve this goal.

- T i p -
Computed CRI % calculates CRI percentage before any carryover award

Data Sections – Set CRI

ACDP employees can also be identified in the CRI section of the spreadsheet. Here you can see the date of their Last ACDP increase and what % increase it was to their basic pay.

lit % Basic y	Computed CRI %	Computed Basic Pay 2024	Max Allowable CRI %	Allow to exceed 20% limit	CY2024 UR Pay	CY2024 LR Pay	On ACDP?	Last ACDP Date	Last ACDP %	Previous Years Control Point	OCS Contr Point
	0.00%	$68,604	6.00%	0	$72,144	$61,456	Y	14-Jul-23	7.00%		
10%	1.69%	$89,894	6.00%	0	$97,157	$82,764					77.00
	2.76%	$95,364	6.00%	0	$103,117	$87,840					77.00
	1.27%	$91,712	6.00%	0	$99,105	$84,422					77.00
	0.14%	$101,330	6.00%	0	$109,442	$93,229					77.00
	1.57%	$88,132	6.00%	0	$95,248	$81,137					77.00
	0.00%	$90,339	6.00%	0	$97,157	$82,764					77.00
	0.66%	$99,316	6.00%	0	$107,292	$91,397					77.00
	4.09%	$82,949	6.00%	0	$89,743	$76,448					77.00
	0.00%	$87,207	0.00%	0	$93,377	$79,543					77.00
	2.25%	$95,385	6.00%	0	$103,117	$87,840					77.00
	2.17%	$84,681	6.00%	0	$91,542	$77,980					77.00
	4.07%	$93,439	6.00%	0	$101,091	$86,114					77.00
					$101,091	$86,114					77.00
					$97,157	$82,764					77.00
					$91,542	$77,980					77.00

Note
Consult your pay pool's business rules for any special treatment for ACDP employees. (e.g., all ACDP employees will be given presumptive status 2 and be excluded from CRI and CA calculations)

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Reviewing Cash Differentials

All Supervisor and Team Lead Cash Differentials should be reviewed every year at the same time as the CCAS annual assessment. Adjustments can be proposed to an employee's differential by the pay pool due to any CRI increase the employee may be receiving

Computed CRI $	Split % to Basic Pay	Computed CRI %	OCS Control Point	Approved CRI $	New Basic Pay 2024	Supv/Team Lead	Supervisor Differential Start Date	Supervisor Differential Rate	Supervisor Differential Amount	New Supervisor Differential Rate	New Supervisor Differential Amount	WildC:
$7,528		7.91%		$5,711	$105,382	Supv	15-Jan-21	3.00%	$2,855		$0	
$1,157		1.12%		$1,157	$109,654	Supv	19-Mar-21	3.00%	$3,108		$0	
$6,072		5.62%		$2,052	$115,079	Supv	19-Mar-21	4.00%	$4,318		$0	
$335		0.32%		$335	$109,693	Supv	11-Dec-20	1.00%	$1,044		$0	
$1,081		1.02%		$1,081	$111,856	Supv	21-May-21	5.00%	$5,290		$0	
$1,947		1.89%		$1,947	$109,617	Supv	29-Mar-20	1.50%	$1,542		$0	
$1,650		1.60%		$1,650	$109,631	Supv	23-Jul-21	4.00%	$4,125			
$4,983		5.78%		$4,983	$95,245	Supv	14-Jun-21	3.00%	$2,586			

Computed CRI% may be different than the actual CRI% increase from the employee's Approved CRI $ due to caps from max basic pay. (ex.: the Approved CRI $ is 6.00% of the employee's basic pay, not 7.91%)

The Pay Pool Manager may set a new differential rate for the employee. This rate will be applied as part of the CCAS payout.

~ N o t e ~
Changes to the differential rate may require a higher-level approval than the Pay Pool Manager. Consult your Business Rules.

Data Sections – Locality Pay

The Locality Pay Section has no options but is useful in identifying employees who have reached Level IV Executive Pay. When this happens, even though their base pay goes up, their locality pay will be reduced to keep their salary under Level IV Executive Pay.

9														
10														
11	Gonzalez	Helen	ZX	15.37%	$19,122	$143,532	No	$143,532	$0	$0	$0	$0	$0	1
12	Carlson	Robert	ZX	15.37%	$14,200	$106,587	No	$106,587	$0	$0	$0	$0	$0	1
13	Perino	Matt	LA	30.57%	$29,653	$126,654	No	$126,654	$0	$0	$0	$0	$0	3
14	Cowan	Jeff	LA	30.57%	$42,361	$180,93	Yes	$166,500	$11,943	$26,328	$2,849	$0	$14,792	Yes	3
15	Jerris	Jane	ZX	15.37%	$13,423	$100,75	No	$100,753	$915	$14,483	$1,567	$0	$2,482	3
16	Benson	Tom	ZX	15.37%	$13,423	$100,75	No	$100,753	$853	$14,835	$1,605	$0	$2,458	3
17	Corke	Greg	LA	30.57%	$33,209	$141,84	No	$141,843	$1,195	$17,692	$1,914	$0	$3,109	3
18	Miller	Karl	LA	30.57%	$25,149	$107,41	No	$107,417	$0	$18,623	$2,015	$0	$2,015	3
19	Sorenson	Sarah	ZX	15.37%	$13,159	$98,77	No	$98,773	$207	$18,114	$1,960	$0	$2,167	3
20	Wallace	Poppy	ZX	15.37%	$21,299	$159,87	No	$159,871	$0	$10,933	$1,183	$0	$1,183	3
21	Harlow	Arwa	WA	28.22%	$39,105	$177,67	Yes	$166,500	$0	$10,933	$1,183	$0	$1,183	3
22	Haberman	John	LA	30.57%	$42,361	$180,93	Yes	$166,500	$0	$10,933	$1,183	$0	$1,183	3
23	Butler	Bryce	LA	30.57%	$42,361	$180,933	Yes	$166,500	$0	$10,933	$1,183	$0	$1,183	3
24	Mele	Rob	LA	30.57%	$20,558	$87,808	No	$87,808	$0	$4,504	$487	$0	$487	3
25	McHenrey	Jon	LA	30.57%	$29,683	$126,780	No	$126,780	$0	$7,504	$812	$0	$812	3
26	Axelrod	Kate	LA	30.57%	$29,173	$124,602	No	$124,602	$0	$5,131	$555	$0	$555	3
27	MacCallum	Gillian	LA	30.57%	$29,551	$126,219	No	$126,219	$0	$3,909	$423	$0	$423	3

Data Sections – Set Award

The Set Award Section shows how an employee's contribution award (CA) is calculated. Just like the CRI calculations, the Pay Pool can make discretionary decisions to increase or decrease an employee's Contribution Award.

Carryover Award is any CRI money redistributed as CA dollars

Final CA is any dollar value remaining after TOA and any Secondary Discretionary money

			Remainder =	$924					$48,743		
Carryover Award	CA Pos Delta Y	Computed Award	(PPM Input) Discretionary Award	Requested % to TOA	Approved % to TOA	Time Off Hours	Dollar Value Remain	Second Discretionary Award	Final CA Award	Total Award
$3,853	$13,371	$3,463	$2,700			0	$6,163		$6,163	$10,01
$4,020	$9,79	$2,536	$3,460		25%	27	$4,507		$4,507	$8,527
$1,560	$14	$3,738				0	$3,738		$3,738	$5,298
$1,080		$3,554				0	$3,554		$3,554	$4,634
$1,538		$2,748				0	$2,748		$2,748	$4,286
$723		$3,467				0	$3,467			
$93	83	$3,207				0	$3,207			
	407	$3,990				0	$3,990			
	1,912	$3,085				0	$3,085			
		$4,078			0%	0	$4,078		$4,078	$5,895
		$3,006				0	$3,006		$3,006	$3,819
		$3,780		50%	50%	40	$2,556		$2,556	$3,729
		$3,552				0	$3,552		$3,552	$3,552
		$3,291				0	$3,291		$3,291	$3,291

Computed Award is the amount of CA dollars the spreadsheet's algorithm has calculated for the employee

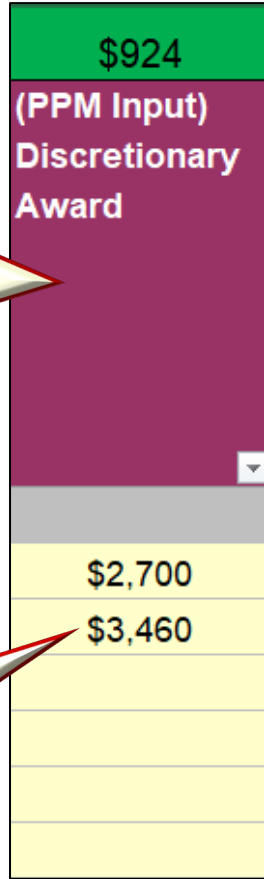*Total Award consists of the Final CA plus any Carryover Award*

Data Sections – Set Award

You have two different discretionary pay options for award.

$924
(PPM Input) Discretionary Award

$2,700
$3,460

$48,743
Second Discretionary Award

Available Balance shows how many discretionary dollars you have available. (When highlighted red you have a negative balance.)

Discretionary Award consists of any CA dollars the spreadsheet's algorithm was unable to distribute, plus any award set aside from parameters settings.
Any money distributed here will count towards TOA allocations.

Secondary Discretionary Award consists of any dollar values allocated to it through CA Proration and/or TOA, plus any remaining Discretionary Award dollars.
Any money distributed here will not count towards TOA allocations

You can allocate discretionary dollars by entering the amount the pay pool wants to distribute to the employee in the corresponding yellow cell

Reviewing Time Off Awards (TOA)

Requested TOA's are automatically matched as approved but may be changed by the PPM. Only Computed CA is used to Calculate TOA hours. The value of the CA used to buy the TOA will be redistributed according to settings on Parameters Tab

			Remainder =	$92					$47,254		
Carryover ward	CA Pos Delta Y	Computed Award	(PPM Input) Discretionary Award	Requested % to TOA	Approved % to TOA	Time Off Hours	Dollar Value Remain	Second Discretionary Award	Final CA Award	Total Award
$2,318				50%	50%	23	$1,175		$1,175	$1,175
$0						0	$0		$0	$0
$2,279						0	$2,279		$2,279	$2,279
$2,007						0	$2,007		$2,007	
$2,609							$2,609		$2,609	
$2,261							$2,261		$2,261	
$1,929							$1,929		$1,929	
$1,612				50%	50%		$839			

~ N o t e ~
TOA hours are bought as a percentage of the value of an employee's Computed Award and Discretionary Award (the Add CRI remainder to CA option will add to Computed Award). Carryover Award and Secondary Discretionary are not used for TOA.

~ N o t e ~
Employees are limited to 40 hrs TOA from CCAS process and 80 hrs total in a given year. TOA expires 1 year from date awarded to employee.

Approved % to TOA is adjustable by the PPM.

Data Sections – Summary

The beginning part of the "Summary" section has a couple flags for results that may require work outside of the pay pool process (Award > $10K, Mandatory CIP) along with some additional useful information.

Award > $10K? will flag any Total Award greater then $10,000 that require Head of Participating Organizations Approval. (this does not include the value of any TOA)

You can see an Employees Rating of Record. (calculated from their PAQL Scores)

The employees estimated total compensation for the next year. Basic Pay + Locality Pay + Total Award + any Differential Pay

Mandatory CIP column indicates any employee that needs to be considered for a CIP by indicating so with a 1 highlighted in red

You can see what an employee's EOCS will be next year in the CY20xx Expected OCS column.

	Award > $10K?	Rating of Record	Total New Comp. Basic Pay + Supv Diff + Awd	WildCard 7	CY2024 Expected OCS	Mandatory CIP	Wildcar
RICHARD REID	Yes	5	$111,432		77		
		5	$123,665		83		
		5	$102,848		75		
		5	$100,734		74		
		5	$119,429		83		
RICHARD REID		3	$100,661		74	0	
RICHARD REID		5	$82,283		67	0	
JACK SMITH		1	$134,989	DAWIA	90	1	
RICHARD REID		5			67	0	
BOBBY ELAM		5					

Acq Demo

DAU

Data Sections – Summary

The Summary Section shows the final results of payout calculations. It is here we can easily see an employee's final rating, how their basic pay will be affected by the pay pool results, and any bonus award compensation they will receive.

Appraisal Summary				Compensation Summary						
2023 Expected OCS	2023 OCS	Delta OCS	Rail Position	CY2023 Basic Pay	G ($)	Approved CRI	New Basic Pay 2024	New Basic Pay + Locality 2024	Total Award	Approved CRI + Total Award
76	79	3	C2	$95,391	$4,484	$1,461	$101,336	$101,336	$10,096	$11,557
83	83	0	C2	$107,953	$5,074	$2,052	$115,079	$115,079	$8,586	$10,638
72	76	4	C2	$88,043	$4,139	$5,282	$97,464	$97,464	$5,384	$10,666
71	75	4	C2	$86,736	$4,077	$5,204	$96,017	$96,017	$4,717	$9,921
84	85	1	C2	$111,901	$3,178	$0	$115,079	$115,079	$4,350	$4,350
72	75	3	C2	$87,073	$4,093	$5,224	$96,390	$96,390	$4,271	$9,495
67	70	3	C2	$78,589	$3,694	$0	$82,283	$82,283	$0	$0
88	90	2	C2	$119,887	$5,635	$5,385	$130,907	$130,907	$4,082	$9,467
64	68	4	C2	$75,520	$3,550	$4,531	$83,601	$83,601	$4,061	$8,592
76	80	4	C2	$95,196	$4,475	$5,711	$105,382	$105,382	$5,989	$11,700
64	67	3	C2	$74,106	$3,483	$4,446	$82,035	$82,035	$3,...	
47	55	8	B	$52,953	$2,489	$8,421	$63,863	$63,863	$3,...	

Compensation Override
Please enter a 1 to remove a person from calculations for CA compensation payouts.

The "New OCS" tab shows where employees would plot out on the rails diagram with the same scores and their new basic pay.
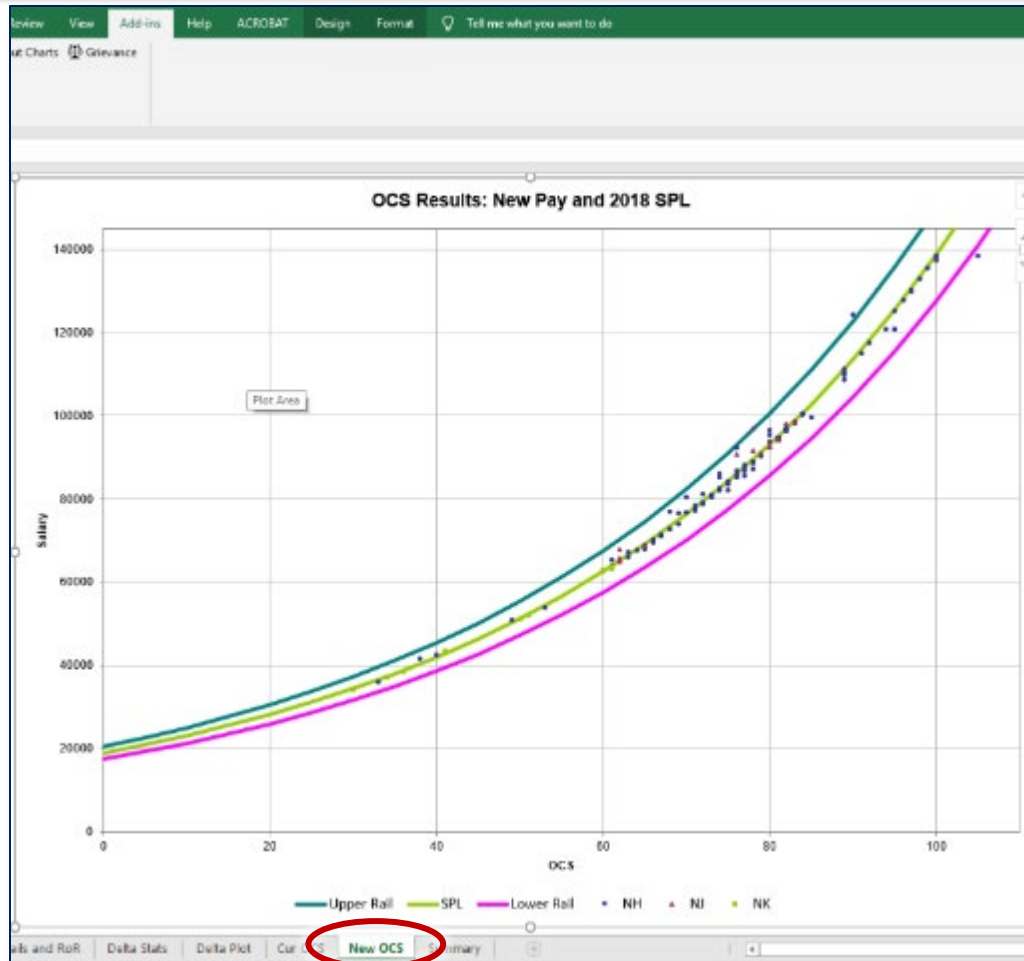
Tabs – Summary

The "Summary" tab gives you the ability to easily see important data columns in an easily viewable spreadsheet format for the printing any hard copies.

Reset Columns will reset the column widths.
Note: It does not work well if any column data has been changed

~ T i p ~
You can change the data the different columns show by the header cell (row 2) and select from the drop-down menu.
Warning! This feature can be slightly difficult to use. It will resize the columns and appear to hide them.

Common Anomalies for Scores

- High/Low delta scores (anything other than a -1, 0, or +1)
  - The further the delta score is from the expected, the more scrutiny it should be given
  - Delta scores may be further delineated by the employee's position in their pay range
    (+1 Delta for an employee with an OCS at the top or beyond the pay range of a position may warrant additional scrutiny)
- Any categorical score in a higher broadband
- Any categorical/numerical score outside the employee's pay range of the employee
- Employee with current OCS below last year's OCS
- Employee with previous year's rating of record (RoR) was a 5 and is now is a 3
- Rating of record 5s with less than delta 0 score
- Groups with much higher/lower delta than average, or rating of record (RoR)
  - Supervisor
  - Occupational series and/or job duties
  - Broadband Level
  - Location Based
  - Employees working on special projects (classified) vs normal
  - Representation on Pay Pool (within 1 or 2 levels vs greater than 1 or 2 levels)
  - Supervisors vs Non-Supervisors
  - Other?
- Unusually high/low average delta compared to previous years
- Unusually high/low percentage of 5 rating of record (RoR) compared to previous years
- Large delta scores where other monetary recognition has been given
- All scores requiring CIP consideration (delta scores in "A" region or PAQL of 1)

> *~Note~*
> *Anomalies do not mean that the ratings are wrong, the ratings should just be double checked*

Common Red Flags for Compensation

Additional checks after compensation adjustments:
- CRI increases greater then %
  - May be further delineated by position in pay range
    - o Beginning of pay range 4.5% or greater
    - o Middle of pay range 3% or greater
    - o Top of pay range 2% or greater

> *~Note~*
> *Red Flags do not mean that the ratings are wrong, the ratings should just be double checked*

- Payouts for employees new to positions
  - Employees who were reassigned to a higher-level position
  - Employees making less then beginning pay of position who do not move into pay range of position
  - Employees promoted part way through the cycle
  - New hires depending on start date
- Employees on cash differentials who do not score higher than their differential
- Payouts for ACDP employees (if applicable) vs compensation already received
- Extraordinarily large bonuses (greater then $10K, or 7% of basic pay)

> *~Note~*
> *Pay careful attention to anything that may be a priority or concern for any higher-level reviewer of the Pay Pools results*

Activity: Demonstration of Spreadsheet

In this activity, we will use the features we have been shown in this presentation to look for anomalies in our pay pool's data.

You can choose to either:

a) Practice using these tools by searching for the anomalies at the same time the instructor is showing you how to search for them, or

b) Just watch how the instructor uses the features of the spreadsheet to examine the data for anomalies

> ~ *N o t e* ~
> *A copy of the sample spreadsheet being used should have been sent with your class invite.*

The Way Forward

- Summary

- Open Forums

- Support

Course Summary

Knowledge essential to a PPA's effectiveness:

☞ Understand the organization's Compensation Strategy

☞ Know your Organization's Business Rules

☞ Know AcqDemo's Operating procedures

☞ Data accuracy in the Spreadsheets is essential to compensation calculations

☞ Know the options available to your pay pool to adjust compensation

☞ **Practice with the spreadsheet to gain familiarity**

CAS2Net and CCAS Open Forum#

TEAMS Meeting Information:

To Access training as a TEAMS guest:

1. Copy and paste the web link into your web browser — Microsoft Edge recommended.
   a. Be sure you are <u>NOT</u> logged in through your TEAMS or Microsoft Office account when accessing through the web browser.

https://teams.microsoft.com/l/meetup-join/19%3ameeting_NzQwY2I3MTktZmI1YS00YWM0LThhY2YtMDI4MDA3ZDIzNGMw%40thread.v2/0?context=%7b%22Tid%22%3a%221c21be44-2435-49bf-bc1f-cba317187058%22%2c%22Oid%22%3a%22ad5815de-5095-4600-8a86-0164be9d07a8%22%7d When the "Open Microsoft Teams" dialogue box opens, click Cancel.

2. Select Continue on this Browser.
3. Continue with audio and video options, then enter your name.
4. Click Join now.

Or call in (audio only)

+1 571-403-9146,,394774786# <tel:+15714039146,,394774786#>   United States, Arlington

Phone Conference ID: 394 774 786#

Trouble Shooting Tips:

1. Clear your web browsers cache:
   https://support.google.com/accounts/answer/32050?hl=en&co=GENIE.Platform%3DDesktop
2. Try using a different web browser.
3. If unable to log in through a web browser, use the TEAMs dial-in number to follow along with the session.

Remaining 2023 Open Forum Schedule
(All Sessions 1pm – 2:30pm ET)

21 September: CAS2Net Sub-Panel Meeting and CMS Online

28 September: Macro Free Sub Panel Spreadsheet and Macro Free CMS

05 October: Discrepancy Reports

12 October: Lock/Unlock Supervisor 1, Sub-Pay Pool and Pay Pool

19 October: Pay Pool Analysis Tool (PAT)

02 November: Initial and Final Upload

16 November: Not Final Reports and Data Complete Reports

07 December: Grievance/Grievance Window

Open Forum Questions?

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Support

AcqDemo Program Office

- Operating Guide
- AcqDemo Website
  - Reference Material
  - Conversion Tool Calculator
- Training
  - Workforce Overview
  - CCAS for Supervisors
  - HR Training
  - Business Rules Development
- Electronic Contact Information
  - acqdemo.hci.mil
  - AcqDemo.Contact@dau.edu
- Cas2Net test site
  - https://cas2net-test.army.mil/

eLearning

- AcqDemo 101
- Contribution Planning
- Giving and Receiving Feedback
- CCAS Appraisal Feedback for Supervisors
- Writing an Annual Appraisal Self-Assessment
- CCAS for Employees
- CCAS for Supervisors
- HR Flexibilities
- Understanding the Pay Pool Process
- Spreadsheets Training
- CAS2Net 2.0 for Employees and   Supervisors
- CAS2Net 2.0 for Administrators

Questions? – Concerns? – Thoughts?

CCAS Spreadsheets
Advanced Functions
for
Pay Pool Administrators

**DoD Civilian Acquisition Workforce
Personnel Demonstration Project (AcqDemo)**

*Thank you
for attending!*