

CCAS Spreadsheets Basic Functions 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 be able to:

- Use the basic features found on the CCAS Spreadsheets
 - Sorts, Filters, Hide/Unhide Columns & Rows, Set Views, Wild Cards, Validate, Import, Export
- Understand what each of the tabs located on both the sub-panel spreadsheet and CMS does
- How to use the *Group into Categories* tool
- Look for common red flags in your pay pool results



Pay Pool Process

Rating Process



Three Phases of the Pay Pool Rating Process

There are three phases to scoring employees during the sub pay pool process. Even in small pay pools, which do not have the need for sub pay pools, these phases should still be followed.

Phase 1 – Review Recommended Scores

Review recommended scores and ensure they align with your organizations scoring criteria and your compensation philosophy.

Phase 2 – Rank Order and Adjust Scoring

Rank order employees as to the value of their contributions and adjust score accordingly.

Phase 3 – Sanity Check

Look at the results of the rank ordering process to ensure that the scoring is fair to the employees and is aligned with your organizations compensation strategy.



Classification and Appraisal Factors

Job Achievement and/or Innovation

- Qualifications
- Critical Thinking
- Calculated Risks
- Problem Solving
- Leadership
- Supervision
- Personal Accountability

Communication and/or Teamwork

- Communication (verbal and written)
- Interactions with customers, coworkers, and groups
- Assignments crossing functional boundaries

Mission Support

- Understanding and execution of organizational goals and priorities
- Working with customers to develop a mutual understanding of their requirements
- Monitoring and influencing cost parameters or work, tasks, and projects
- Establishing priorities that reflect mission and organizational goals

Determine a Categorical and Numerical Contribution Score for EACH Factor

- ↳ *Must score contributions to mission and performance separately*
- ↳ *Average 3 factor scores to get the Overall Contribution Score (OCS)*



Using Factor Descriptors & Discriminators

Factor 1: Job Achievement and/or Innovation for NH-III

LEVEL DESCRIPTORS	DISCRIMINATORS
<p>LEVEL III</p> <ul style="list-style-type: none"> • Considered a functional/technical expert by others in the organization; is regularly sought out by others for advice and assistance. • Pursues or creates certification, qualification, and/or developmental programs and opportunities for self and others. • Guides, motivates, and oversees the activities of individuals and teams with focus on project/ program issues. Assumes ownership of processes and products, as appropriate. • Develops, integrates, and implements solutions to diverse, highly complex problems across multiple areas and disciplines. • Develops plans and techniques to fit new situations to improve overall program and policies. Establishes precedents in application of problem-solving techniques to enhance existing processes. • Defines, directs, or leads highly challenging projects/programs 	<ul style="list-style-type: none"> • Leadership Role • Mentoring/Employee Development • Accountability • Complexity/Difficulty • Creativity • Scope/Impact

*Use Descriptors for
Categorical Scores*

*Use Discriminators for
Numerical Scores*



Determining Categorical Scores

- Factor level descriptors and discriminators are used to determine a categorical score
- Descriptors are written at the top of the broadband
- **High:** Employee consistently and independently meets full intent of **all** factor descriptors during the appraisal cycle
 - E.g., meet all 14 descriptors - 6 for Job Achievement and/or Innovation, and 4 for other two factors
- **Medium:** Employee meets **most** (defined as more than half) factor descriptors during the appraisal cycle with minimal guidance
 - E.g., meet 4-5 descriptors for Job Achievement and/or Innovation, and 3 for other two factors
- **Low:** Employee consistently meets **less than most** factor descriptors during the appraisal cycle or needs greater than expected assistance in meeting them
 - E.g., meet at least 1 descriptor per factor

Note: Suggested best practice, but NOT the only possible criteria for rating. Check your Business Rules for guidance.



Very High Scores

- Very High scoring has 3 options – High, Medium and Low with corresponding numerical scores
 - Scores only available for employees in the highest broadband level for their career paths
- Factor level descriptors are available to define Very High Scores at the mid-level
 - Same for all 3 factors

		Business Management and Technical Management Professional (NH)	Technical Management Support (NJ)	Administrative Support (NK)
	Categorical Score	Numerical Score	Numerical Score	Numerical Score
Very High (VH) Scores	High	115	95	70
	Medium	110	91	67
	Low	105	87	64



Broadband Level Score Ranges

Levels	Categorical	NH Point Range	NJ Point Range	NK Point Range
Very High	High	115	95	70
	Med	110	91	67
	Low	105	87	64
IV	High	96 – 100	79 – 83	--
	Med	84 – 95	67 – 78	--
	Low	79 – 83	61 – 66	--
III	High	79 – 83	62 – 66	57 – 61
	Med	67 – 78	52 – 61	47 – 56
	Low	61 – 66	43 – 51	38 – 46
II	High	62 – 66	47 – 51	42 – 46
	Med High	51 – 61	41 – 46	--
	Med	41 – 50	36 – 40	30 – 41
	Med Low	30 – 40	30 – 35	--
	Low	22 – 29	22 – 29	22 – 29
I	High	24 – 29	24 – 29	24 – 29
	Med	06 – 23	06 – 23	06 – 23
	Low	00 – 05	00 – 05	00 – 05



Rank Order

Use Factor Discriminator Language to rank order contributions

Job Achievement and/or Innovation

- Leadership role
- Mentoring/Employee Development
- Accountability
- Complexity/Difficulty
- Creativity
- Scope/Impact

Communication and/or Teamwork

- Oral
- Written
- Contribution to Team
- Effectiveness

Mission Support

- Independence
- Customer Needs
- Planning/Budgeting
- Execution/Efficiency

Determine a Numerical Contribution Score for EACH Factor

- Same for all broadbands and career paths
- Helps establish relative value of contributions
 - Places degree of impact into context



Determining Numerical Scores

- Review the factor discriminators and knowledge of employee's contributions to rank order the results to determine the Numerical Score
- Numerical Score range must be associated with the respective Categorical Score

Factor 1: Discriminators
• Leadership Role
• Mentoring/Employee Development
• Accountability
• Complexity/Difficulty
• Creativity
• Scope/Impact

NH Career Path
Job Achievement and/or Innovation Factor

3 High (3H)	79-83
John, Susan	83
Dan	82
Bruce, Rick	81
James	80
Rose, Joe	79

Apply logic to your thought process and judgment when recommending numerical scores.



Quality of Performance

- CCAS includes assessment of the quality of **performance** an employee demonstrates in achieving his/her expected contribution results during an appraisal cycle
- Quality of Performance rating assigned to each factor in addition to contribution factor scores
- Average of three performance factor ratings translates to the annual rating of record for awards and RIF purposes





Determining PAQL Scores

PAQL Score	PAQL Criteria	Examples	Rating Criteria
Level 5 — Outstanding	An employee’s quality of performance exhibited in achieving his/her contribution results substantially and consistently surpasses the factor-specific expected contribution criteria and the employee’s contribution plan goals and objectives.	Employee’s performance made distinguishable outcomes, set precedent, industry-wide recognition, etc.	Average of 3 Scores > 4.3 = 5
Level 3 — Fully Successful	An employee’s performance consistently achieves, and sometimes exceeds, the factor-specific expected contribution criteria and his/her contribution plan goals and objectives.	Employee’s performance gets the job done and sometimes exceeds expectations.	Average of 3 Scores < 4.3 = 3
Level 1 — Unacceptable	An employee’s performance fails to meet the expectations for quality of work and the required results for the goals and objectives set forth in his/her contribution plan for the appraisal cycle.	Employee’s performance shows unsatisfactory quality, quantity or timeliness of work, incomplete, etc.	Any Single Score of 1 = Overall 1



Questions? - Concerns? - Thoughts?





CCAS Spreadsheet

Starting Spreadsheet

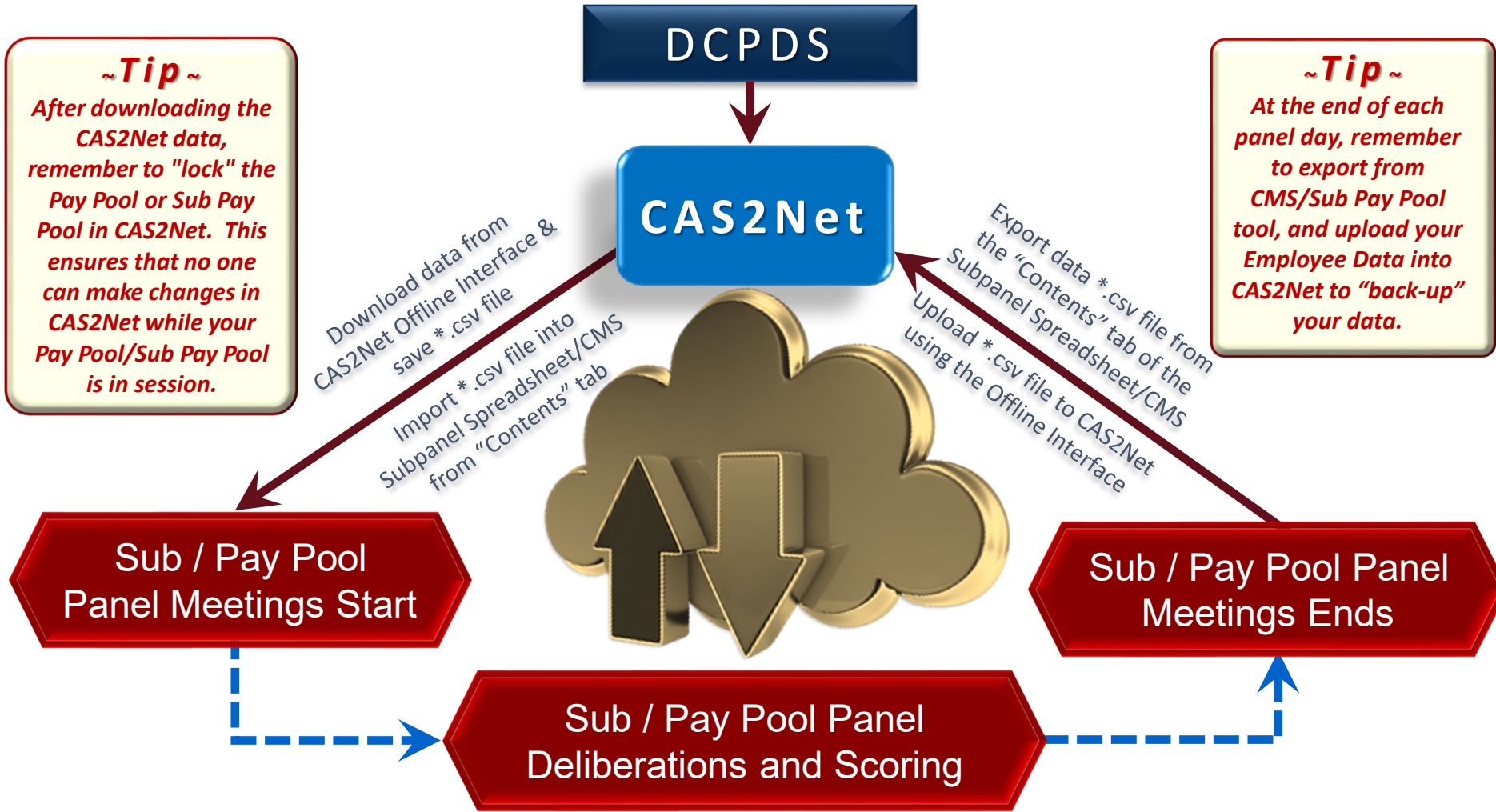
Importing & Exporting Data



Understanding CAS2Net Roundtrips

~Tip~
 After downloading the CAS2Net data, remember to "lock" the Pay Pool or Sub Pay Pool in CAS2Net. This ensures that no one can make changes in CAS2Net while your Pay Pool/Sub Pay Pool is in session.

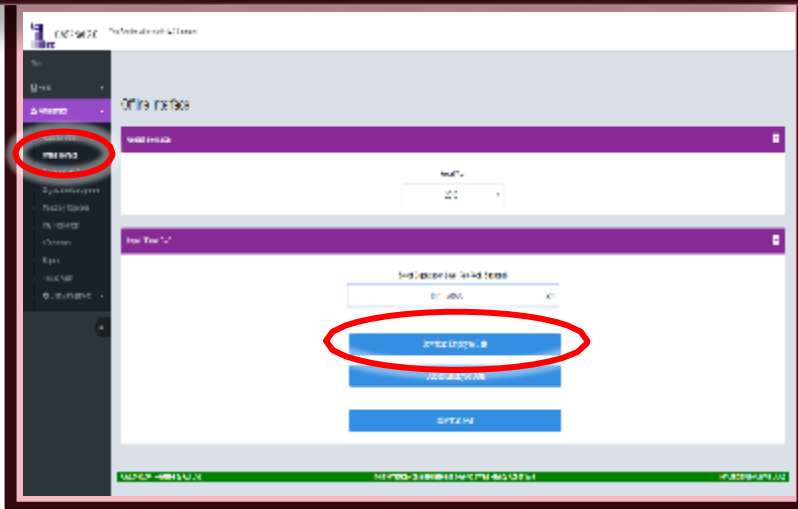
~Tip~
 At the end of each panel day, remember to export from CMS/Sub Pay Pool tool, and upload your Employee Data into CAS2Net to "back-up" your data.



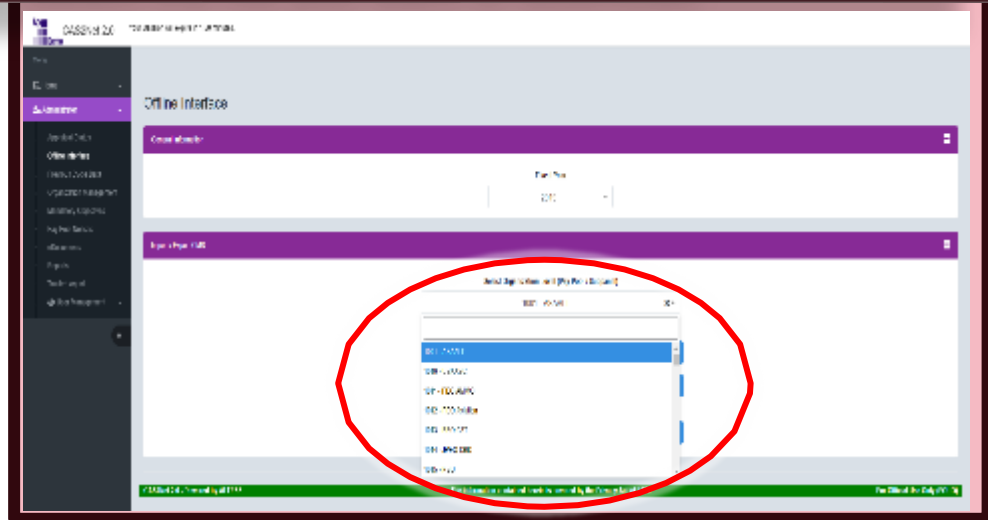


Spreadsheet Set-up – Downloading Files

1. In CAS2Net, go to “Offline Interface” then select “Download Employee Data”



2. Select the file you want to download

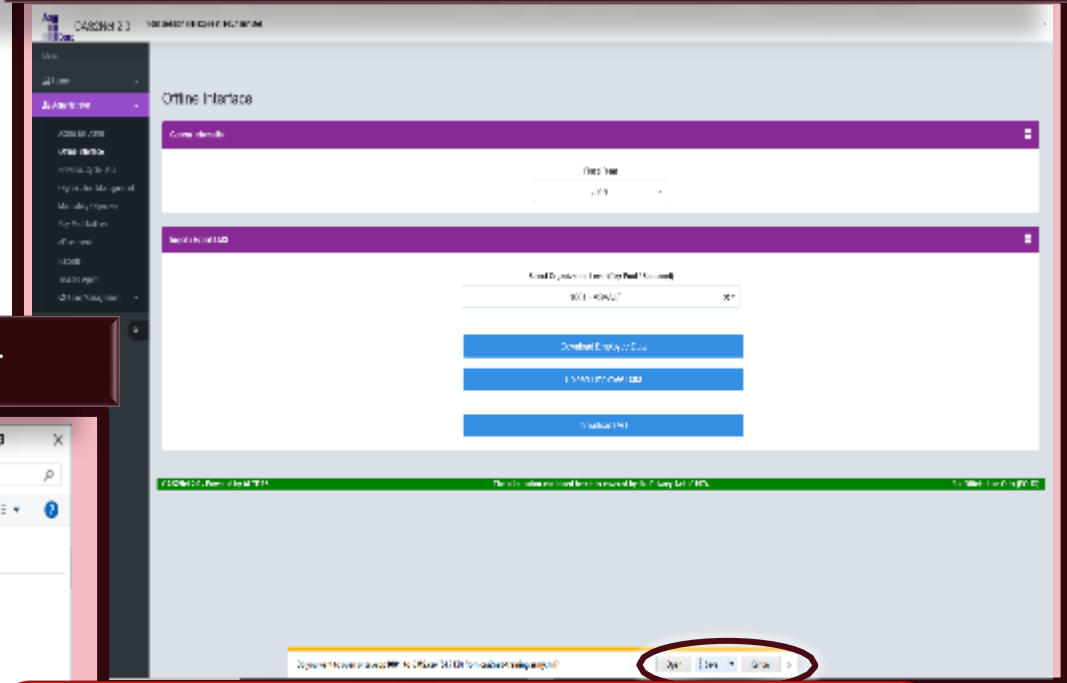




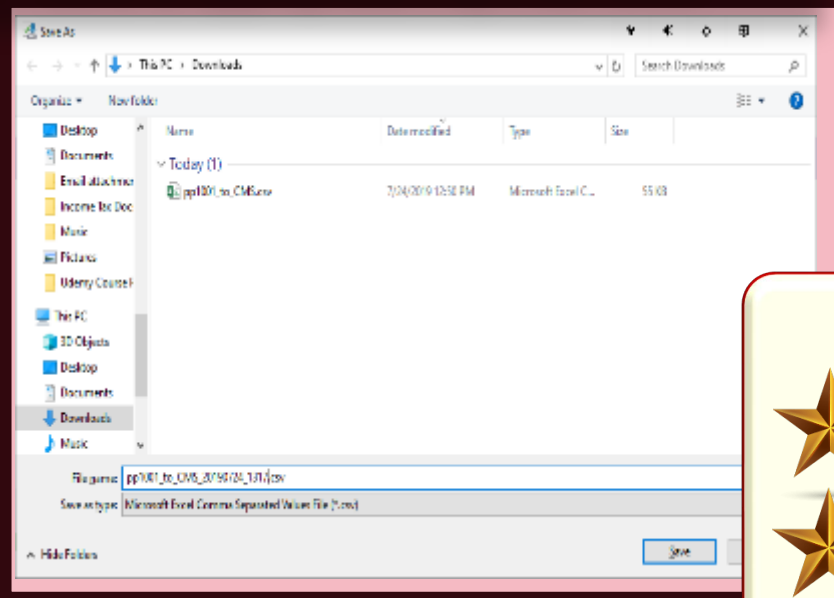
Spreadsheet Set-up – Downloading Files



3. Open the downloaded file and select “Save as”



4. Save to appropriate Pay Pool folder



~Tips~



Do NOT change the core naming convention from “ppXXX_to_CMS” or “ppxxx_to Sub-Panel”



DO add date and time of download to the file name:

“ppXXXX_to_CMS_20190724_1311”



Spreadsheet Set-Up

Enabling Spreadsheet Macros

- Open the SPP Spreadsheet/CMS file
- Click on the “Enable Content” box

Security Warning Some active content has been disabled. Click for more details. [Enable Content](#)

A7

Sub-Panel Meeting Spreadsheet

Cycle: 2016 Version: 2

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, click on the Data tab to enter preliminary and final scores. To assign scores Group into Categories, click on the Data tab to enter preliminary and final scores. To assign scores and Score Levels, click on the Data tab to enter preliminary and final scores. To assign scores between four and five levels, click on the Data tab to enter preliminary and final scores. To assign scores for that level plus one level, click on the Data tab to enter preliminary and final scores. To assign scores and next levels, click on the Data tab to enter preliminary and final scores.

Paypool Data Last Import: Last Export: Last Modified: Use Today

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

Scores

Macros have not been



Spreadsheet Set-Up

Enabling Spreadsheet Macros – Complete

- Screen will refresh and enable macros
- When complete, do a “Save As” to retain an unpopulated spreadsheet file for future access.
- Repeat the same steps for CMS

The screenshot shows a spreadsheet interface with a red header bar containing the title "Sub-Panel Meeting Spreadsheet". Below the header, the text "Cycle: 2016 Version: 2" is visible. A paragraph states: "The purpose of this spreadsheet is to assign preliminary and final contribution scores to employees." The interface includes several sections: "Data/Spreadsheet Download" with instructions on how to import data from CAS2Net; "Appraisal Score Entry" with detailed instructions on how to assign scores; "Paypool Data" with links for "Import", "View", and "Export", and fields for "Last Import", "Last Export", and "Last Modified"; "Scores" with a link for "Group into Categories"; and "Summary Reports" with a link for "Rails Report".

The screen should cycle rapidly through a variety of tabs as the macros are loaded. Once complete, you are ready to import your data.



Spreadsheet Set-Up

Enabling Spreadsheet Macros (alternate method)



Due to updates in the security profile of some networks, preparatory steps may be required when opening and activating the macros for both the Sub Pay Pool Spreadsheet and the CMS



The required steps are outlined in the following slides



Spreadsheet Set-Up

Enabling Spreadsheet Macros – Step 1

- Open the SPP Spreadsheet/CMS file
 - ➔ Do not click “Enable Content” button
- Instead, click on the “Some active content has been disabled...” link

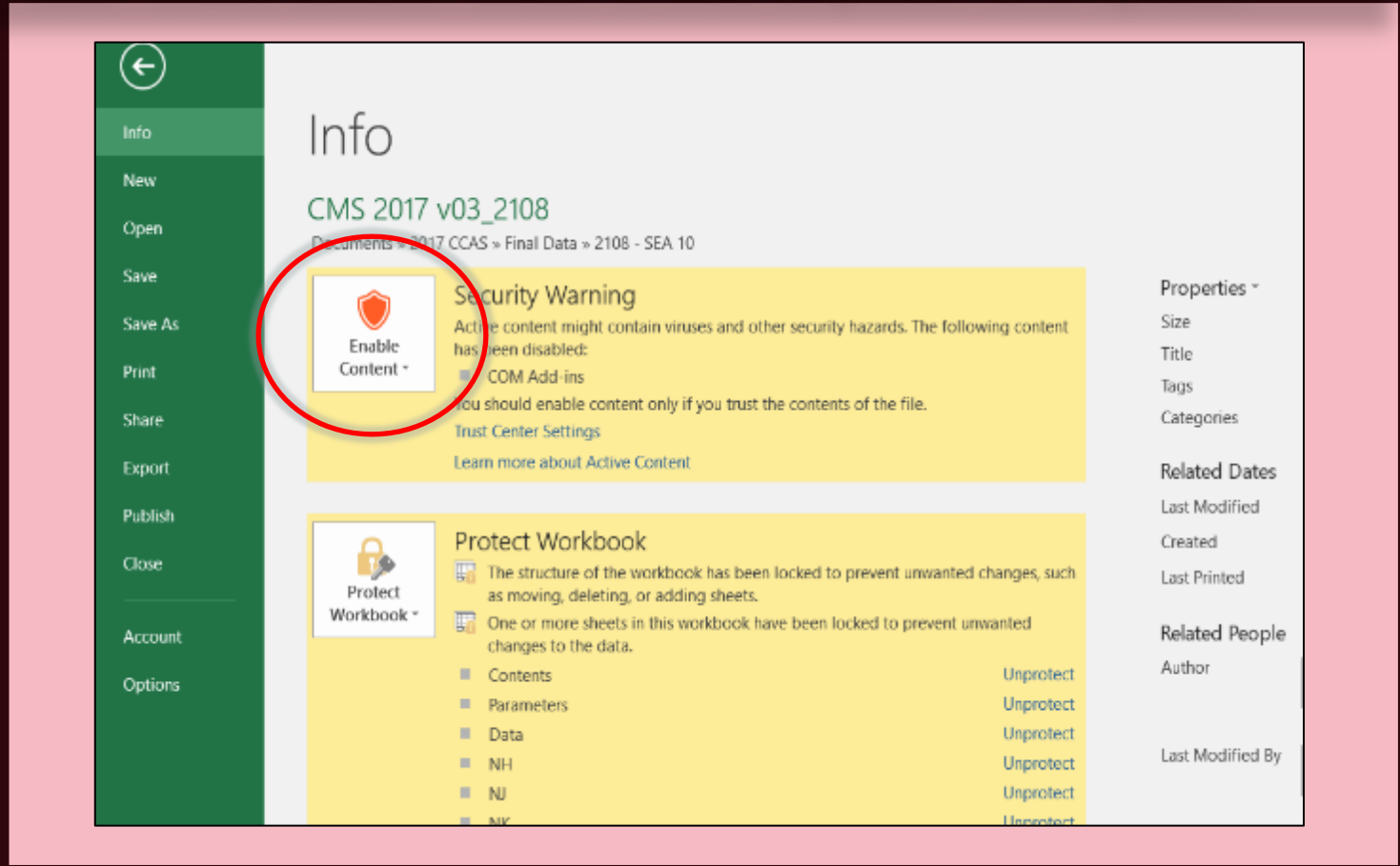
The screenshot shows a Microsoft Excel spreadsheet. At the top, a yellow security warning banner reads: "Security Warning Some active content has been disabled. Click for more details. Enable Content". The text "Some active content has been disabled. Click for more details." is circled in red. Below the warning, a red banner across the top of the spreadsheet reads "Sub-Panel Meeting Spreadsheet". Below this, the spreadsheet contains text: "Cycle: 2016 Version: 2" and "The purpose of this spreadsheet is to assign preliminary and final contribution scores to employees." There are also buttons for "Import", "View", and "Export" under the heading "Paypool Data". A yellow box highlights the "Data/Spreadsheet Download" instructions. At the bottom of the spreadsheet, a large yellow box contains the text "Macros have not been".



Spreadsheet Set-Up

Enabling Spreadsheet Macros – Step 2

- The screen will refresh and show information about the Sub Panel/CMS spreadsheet
- Click “Enable Content” button to show dropdown list of options





Spreadsheet Set-up

Enabling Spreadsheet Macros – Step 3

➤ Click “Enable All Content” from the dropdown list

The screenshot shows the Microsoft Excel 'Info' pane for a file named 'CMS 2017 v03_2108'. A yellow 'Security Warning' box is displayed, stating that active content has been disabled. A dropdown menu is open from the 'Enable Content' button, with the 'Enable All Content' option highlighted by a red circle. Below this, an 'Advanced Options' section allows users to select which content types to enable for the session. To the right, the 'Properties' pane shows file details like size (1.02MB) and last modified date (1/25/2017). The 'Protect Workbook' section is also visible, showing that the workbook structure and several sheets are locked.



Spreadsheet Set-Up

Enabling Spreadsheet Macros – Complete

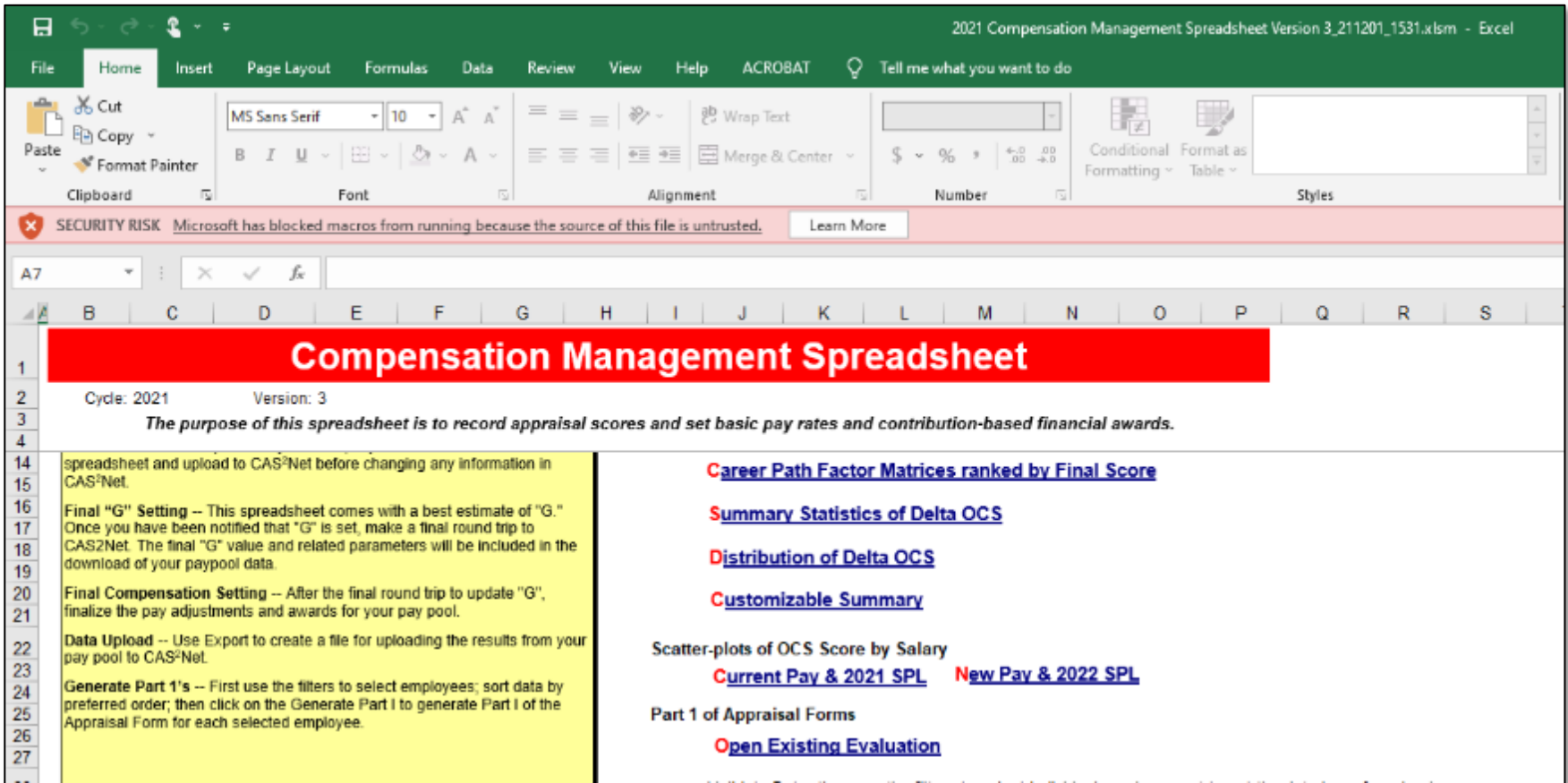
- Screen will refresh and enable macros
- When complete, do a “Save As” to retain an unpopulated spreadsheet file for future access.
- Repeat the same steps for CMS

The screen should cycle rapidly through a variety of tabs as the macros are loaded. Once complete, you are ready to import your data.



New Microsoft Macro Security

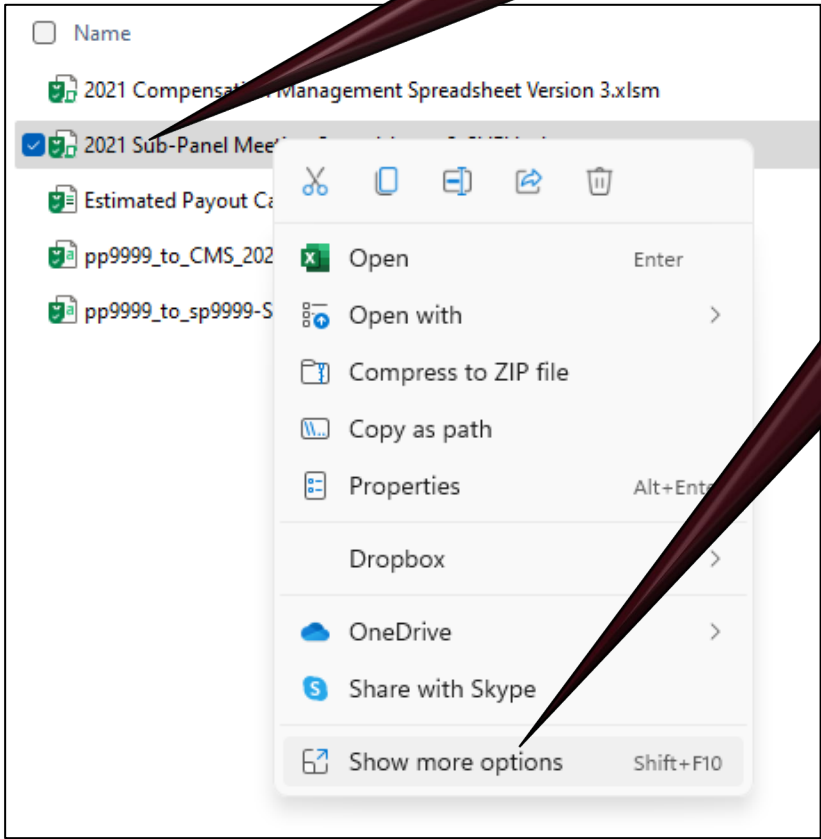
At the end of August 2022 Microsoft did a security update to disable Macros in downloaded files. This can be identified by a pink security line.





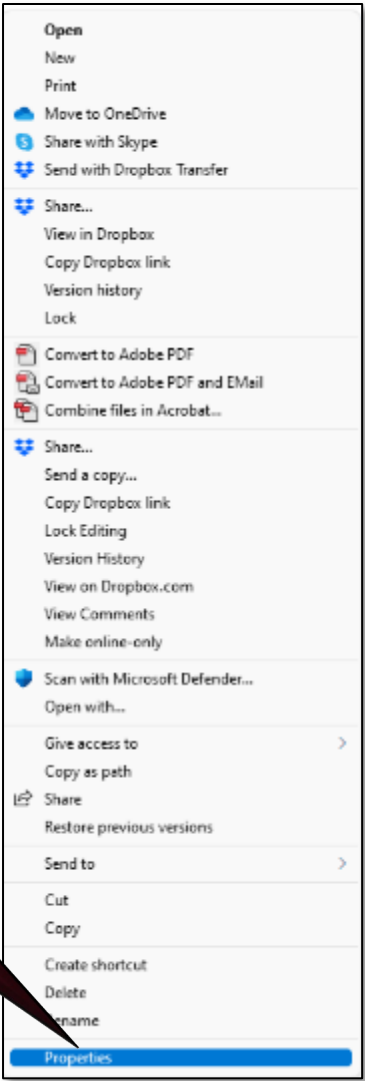
New Microsoft Macro Security

To unlock the macros:
1) Right click on spreadsheet file



2) Left click on Show more options

3) Left click on Properties



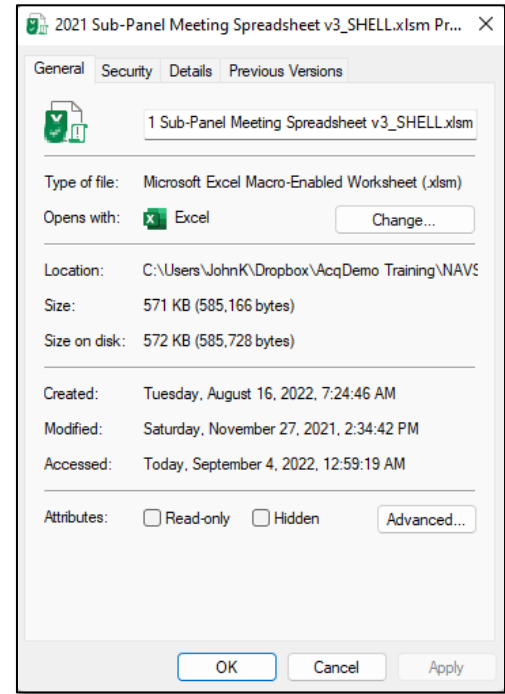
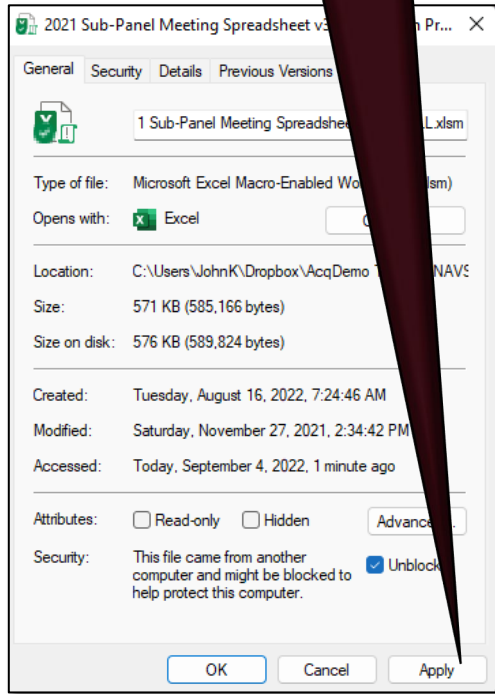
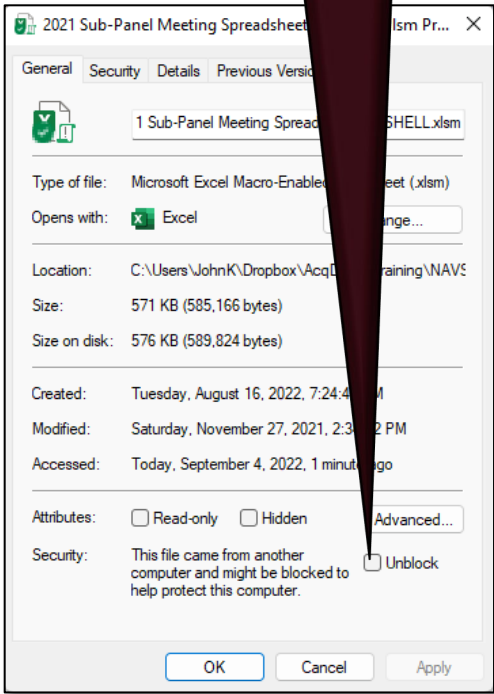


New Microsoft Macro Security

4) Left click on Unblock check box

5) Left click on Apply

File is now able to run macros





Spreadsheet Set-Up – Importing Files



1. Open the appropriate spreadsheet tool (CMS in this example)

2. Select "Import"

3. Select the appropriate file to import:

- "ppXXX_to_CMS" for the CMS Spreadsheet
- "ppXXX_to_Sub-Panel_(SPPM name)" for the Sub- Panel spreadsheet



Spreadsheet Set-up – Importing Files

➤ When the file has been successfully imported, **save** the spreadsheet using the pre-determined naming convention

Compensation Management Spreadsheet

Cycle: 2016 Version: 1

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 CASNet, 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 – Compares 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 CASNet before changing any information in CASNet.

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 CASNet. 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 CASNet.

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.

Pay Pool Data Last Import: 10/26/2016 (11:27:03)(RTT)
Last Export: Last Modified: Use Today

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

Parameters
[Set CRI and CA Parameters](#)

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

Scatter-plots of OCS Score by Salary
[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](#)

Import Complete
Save **OK**

👉 You are ready to begin working in your spreadsheet!



Updating CAS2Net – Exporting Files

- Once validated, *export* the data file from the CMS
 - ↳ Create the file by clicking on the Export link on the CMS “Contents” worksheet

Paypool Data
[Import](#) [View](#) [Export](#) Last Import: 7/31/2019 (8:53:23 AM)(CDT)
Last Export: Last Modified:

Scores
[Group into Categories](#)

Summary Reports
[Rails and RoR 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 & 2018 SPL](#)

- Save the export file generated by the CMS
 - ↳ Save file as: “ppXXX_to_Master_date_time”

Choose File to Upload

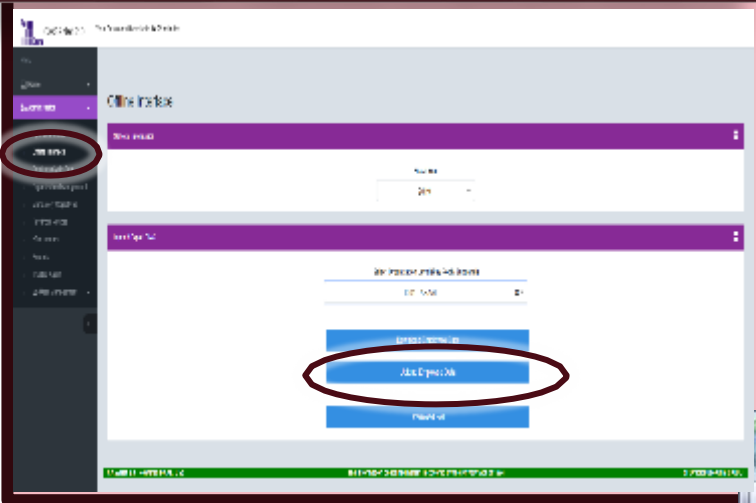
Desktop

Name	Size
Microsoft Excel 2010	
Microsoft Outlook 2010	
Microsoft PowerPoint 2010	
Microsoft Word 2010	
NAVSEA FY16 Pay Pool Schedule	
pp2113_to_CMS_161017_1442	
pp2113_to_CMS_161028_1122	
pp2113_to_Master_161028_1130	20,...
PRD DB	
Privacy Act Request for Records	

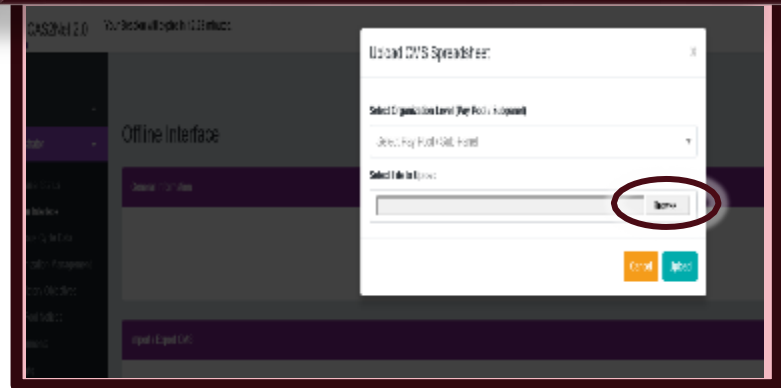
File name: pp2113_to_Master_161028_1130

Updating CAS2Net – Uploading Files

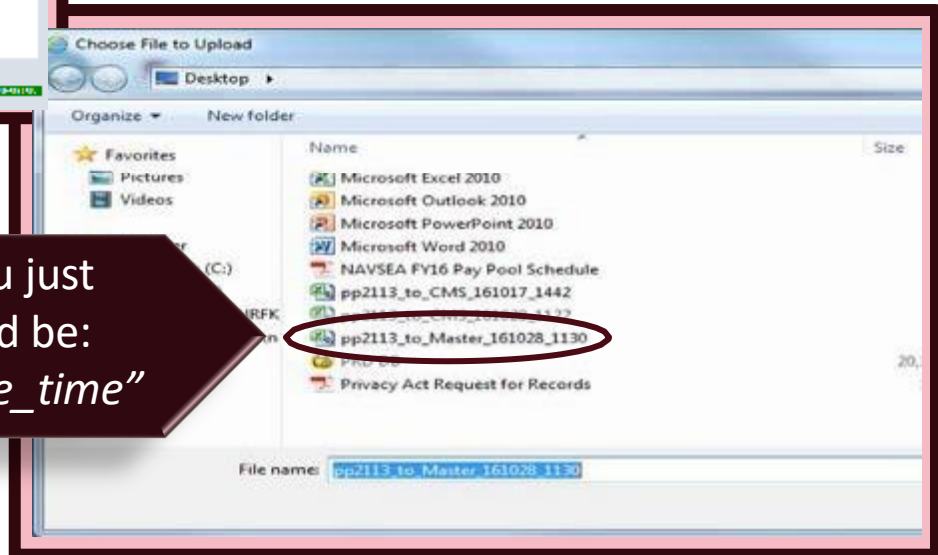
1. In CAS2Net, go to “Offline Interface” then select “Upload Employee Data”



2. Select “Browse”



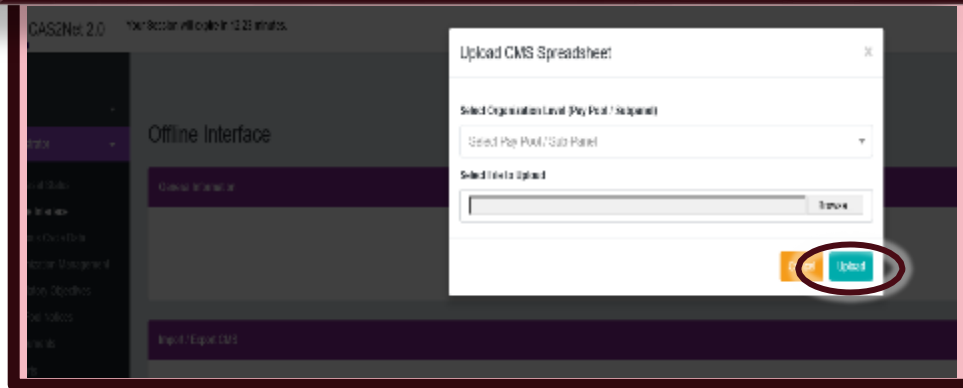
3. Select the export file you just created. Filename should be: “ppXXX_to_Master_date_time”





Updating CAS2NET – Uploading Files

4. Select “Upload”



- You should see a “Data Values Uploaded” screen
- Pay attention to any upload errors listed in the “Status” column

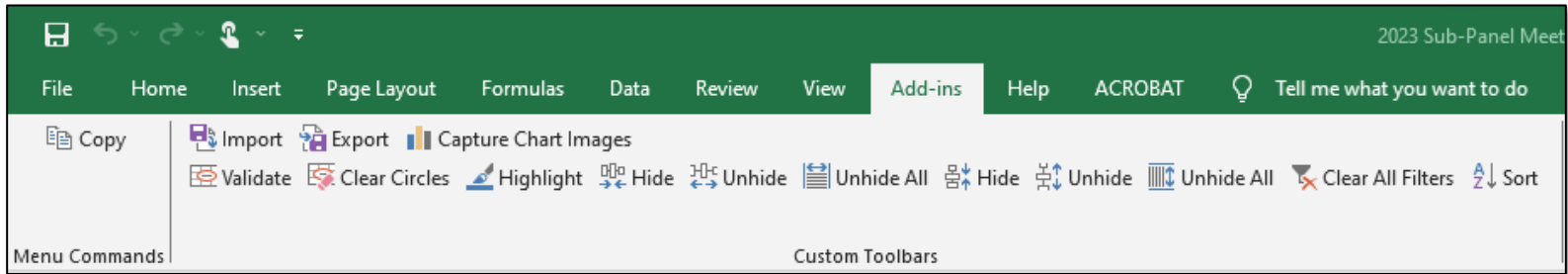
 *You have successfully uploaded your data to CAS2Net!*



CCAS Spreadsheet Basic Functions



Add-ins Toolbar



The Add-ins toolbar is a custom toolbar that allows increased function within the CMS spreadsheets.

On the Sub-Panel Sheet, you have the ability to copy data, Import/export .csv data files, capture chart images for use in briefs, validate spreadsheet data, highlight cells, hide and unhide columns or rows, clear all filters, and sort columns

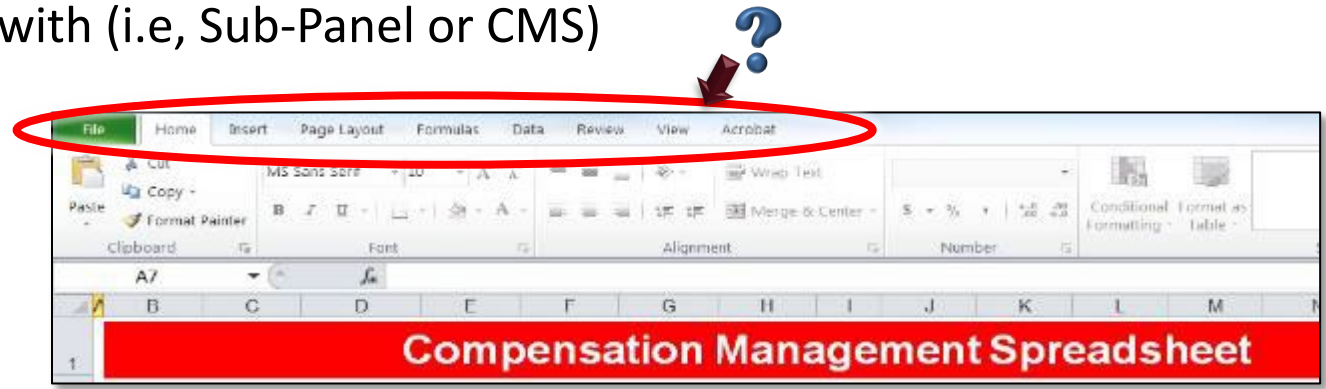
We will go over these tools.



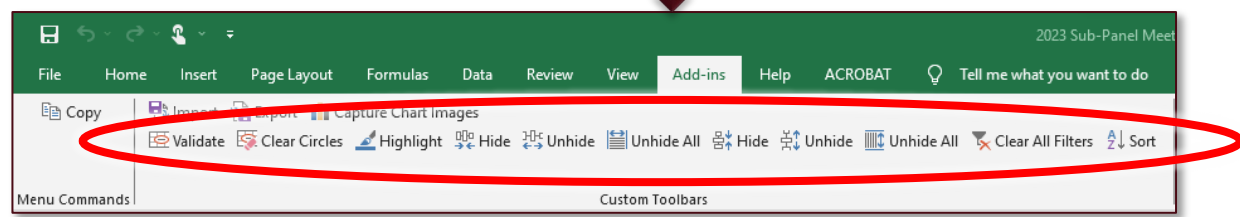
Spreadsheet Set-Up

Restoring a Missing Add-ins Tab

- If the Add-ins tool bar is missing features:
 - Selecting the “Contents” worksheet and returning to the data sheet may resolve this issue
- To restore a missing “Add-Ins” option that has disappeared, close all open Excel spreadsheets and reopen only the spreadsheet you are working with (i.e, Sub-Panel or CMS)



👍 ***“Add-Ins” tab should be restored***

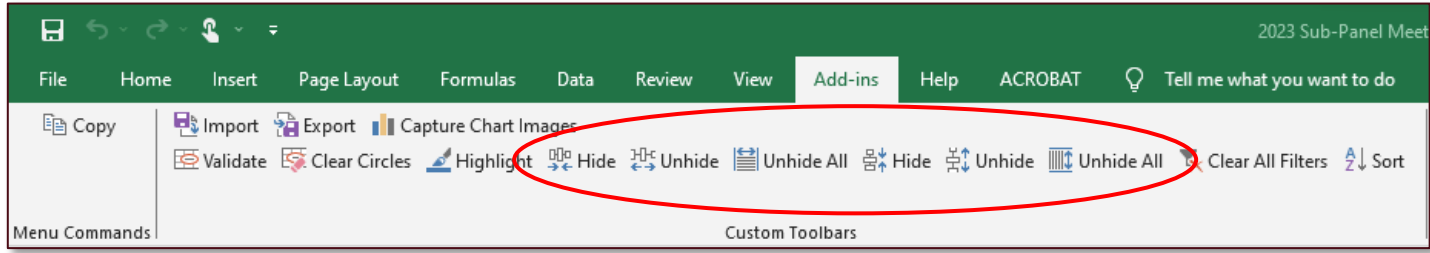




Spreadsheet Set-Up

Hiding and Unhiding Rows and Columns

You are able to Hide and Unhide Rows and columns on your spreadsheet by using these add-in features



Sym	Name	Purpose
	Hide Column	Hides selected column
	Unhide Column	Unhides rows between selected columns
	Unhide All Columns	Unhides all columns
	Hide Row	Hides selected row
	Unhide Row	Unhides rows between selected rows
	Unhide All Rows	Unhides all rows



Spreadsheet Set-Up

Hiding Rows and Columns

1. Click on the "Add-ins" tab
2. Highlight the rows or column you want to hide
3. Click on the hide icon

The screenshot shows the Excel ribbon with the 'Add-ins' tab selected. The 'Data' group contains the 'Hide' icon circled in red. A red arrow points to the selected rows 69-78. The spreadsheet data is as follows:

	A	B	V	W	X	Y	Z	AA	AB	AC	AD	AE	AF	AG	AK	AL
1	Return to				Set											
2	Main Menu				Scores											
3																
4	Goto															
5	Scores															
6																
7	Blue arrows indicate fields															
8	set to filter the data.															
	Last Name	First Name	Sub-Panel Mtg Managers Name	Pay Pool Manager Name												
9																
69	McKelway	Douglas	Trish Flynn	Bob Arnold		3M	3M	3M	70	70	70	3	3	3	DAWA	
70	Damon	Christine	Trish Flynn	Bob Arnold		3M	3M	3M	65	65	65	3	3	3		
71	Sidner	Hala	Trish Flynn	Bob Arnold		3M	3M	3M	67	68	68	3	3	3	DAWA	
72	Amarpour	Erin	Trish Flynn	Bob Arnold		3M	3M	3M	78	78	78	3	3	3		
73	Miller	Ed	Trish Flynn	Bob Arnold		3M	3M	3M	76	78	78	3	3	3		SPRV
74	Carlson	Robert	Trish Flynn	Bob Arnold		3M	3M	3M	79	72	77	3	1	3	DAWA	SPRV
75	Zurbruggen	Zack	Trish Flynn	Bob Arnold												
76	Emerson	Erica	Trish Flynn	Bob Arnold												
77	Ardt	Aaron	Trish Flynn	Bob Arnold												
78	Sorenson	Sarah	Trish Flynn	Bob Arnold		3M	3M	3M	77	77	77	3	3	3	DAWA	SPRV
79																
80																
81																
82	Enter an X in this row to hide columns															
83																
84																
85																



Spreadsheet Set-Up

Unhiding Rows and Columns

1. Click on the "Add-ins" tab
2. Highlight the rows or columns on either side of the ones you want to unhide
3. Click on the unhide icon

Sub-Panel Meeting 2016 v1a1sm - Excel

File Home Insert Page Layout Formulas **Add-ins** Review View ACROBAT Tell me what you want to do

Copy Import Export Capture Chart Intellig...
Validate Clear Circles Highlight Hide Unhide Unhide All Hide Unhide Unhide All Clear All Filters Sort

Menu Commands Custom Toolbars

AA1

	A	B	C	D	E	R	S	T	U	V	W	X	Y	Z	AA	AF	AG
1	Return to Main Menu											Set Scores					
2																	
3																	
4	Goto Scores																
5																	
6																	
7																	
8																	
9																	
10																	
11	Miller	Karl			4502	69	3	1-Feb-99	Eileen Daniels	Trish Flynn	Bob Arnold						
12	Sorenson	Sarah			4501	72	3	1-Feb-99	Eileen Daniels	Trish Flynn	Bob Arnold						
13	Emerson	Erica			3905	49	3	1-Feb-99	Ike Hansen	Trish Flynn	Bob Arnold						
14	Zurbriggen	Zack			3904	61	3	1-Feb-99	George Fites	Trish Flynn	Bob Arnold						
15	Carlson	Robert			3903	81	3	24-Oct-00	Helen Gonzalez	Trish Flynn	Bob Arnold						
16	Miller	Ed			160	77	3	1-Feb-99	Eileen Daniels	Trish Flynn	Bob Arnold						
					159	77	3	1-Feb-99	Eileen Daniels	Trish Flynn	Bob Arnold						
					157	68	3	1-Feb-99	Eileen Daniels	Trish Flynn	Bob Arnold						
					151	70	3	1-Feb-99	Eileen Daniels	Trish Flynn	Bob Arnold						
					150	72	3	1-Feb-99	Eileen Daniels	Trish Flynn	Bob Arnold						
					135	83	5	1-Jan-11	Peter Olson	Trish Flynn	Bob Arnold						
					133	76	3	7-Jul-10	Peter Olson	Trish Flynn	Bob Arnold						
					132	75	3	7-Jul-10	Peter Olson	Trish Flynn	Bob Arnold						
					128	71	3	1-Aug-03	Peter Olson	Trish Flynn	Bob Arnold						
					127	72	3	1-Aug-03	Peter Olson	Trish Flynn	Bob Arnold						
					126	81	3	24-Oct-00	Helen Gonzalez	Trish Flynn	Bob Arnold						

~Tip~
 You can Unhide All Rows or Columns by choosing the appropriate Add-in



Spreadsheet Set-Up — Using Wildcard Columns

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

8 wildcard columns are available in the CMS spreadsheet.
Mandatory uses for Org are:

- Wildcard 1 (Column I):
- Wildcard 2 (Column AU):
- Wildcard 3 (Column AV):
- Wildcard 4 (Column BV):
- Wildcard 5 (Column CZ):
- Wildcard 6 (Column DW):
- Wildcard 7 (Column EA):
- Wildcard 8 (Column ED):

~Note~
Only the first four wildcards are available on the sub panel spreadsheet

	A	B		BY	CG	CI	CX	DG	DM	DQ	DU
1	Return to Main Menu	Edit Parameters		Set GPI 1.0%		Set CRI 2.40%					
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	Wildcard 1 Occupational Series	Wildcard 2 DAWIA	Wildcard 3 Supervisor	Wildcard 4 Broadband	WildCard 5 Control Point Designations	WildCard 6 Sub Panel	WildCard 7	Wildcard 8	
9											
10											
11	Black	Jack	0801	DAWIA			NH4		Sub 1		
12	Brown	John	0801	DAWIA			NH3		Sub 1		
13	Rubrie	Wanda	0801	DAWIA					Sub 1		

~Tip~
Wildcard headings can be Modified by clicking in the Row 9 heading box

~Tip~
Remember, Wildcard data survives the roundtrip, however formulas do not.
>> See workaround on slide 46 <<



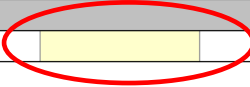
Storing Wild Card Formulas

Headings for wildcards.
Select cell above heading,
arrow down, and edit heading in
formula bar.

Total CY 19 Base Pay = \$0

Prefix	CAS2Net ID	Paypool	Office Symbol	Wildcard 1	Presumptive Status?	Retained Pay?	Career Path	Broadband Level	Occ Series	CY

~Tip~
 You can store a wildcard formula in the yellow highlighted cell after the grey bar signifying the end of data. These formulas will automatically populate the wildcard when new data is imported



Some formulas used on the Sub Panel Spreadsheet is:

$=\$AX12-\$R12$

This would show how the value of an employee's contributions compared to the previous year

Or

$=\$M13$

This would populate an employees Occ Series in the wildcard column



Sub-Panel Meeting Spreadsheet New Columns 2023

- Added column for EDIPI data

	A	B	C	D	E
1	Return to Main Menu	Set View			
2					
3					
4	Goto				
5	Scores				
6					
7	Blue arrows indicate fields set to filter the data.				
8	Last Name	First Name	Middle Initial	Suffix	EDIPI
9					
10					
11	BUNTING	INDIGO			1000000001
12	FINCH	GOLD			1000000002
13	USER	SUPER			1000000004

- Added columns for requested Time-off award and approved time-off award percentage

- Drop down options

- 0%
- 25%
- 50%
- 75%
- 100%

	A	B	AV	AW	AX
	Return to Main Menu	Set View			
	Goto				
	Scores				
	Blue arrows indicate fields set to filter the data.				
	Last Name	First Name	Control Point Used in Calculations	Requested % to TOA	Approved % to TOA
	BUNTING	INDIGO	\$98,85		
	FINCH	GOLD		75%	50%
	USER	SUPER			
	WARBLER	RUMPED			



Set Views

Set View allows users to quickly select a subset of relevant columns while working with a pay pool spreadsheet. 5 views are available on the Sup-Panel Spreadsheet and 8 views on the CMS Spreadsheet

To select a view click on Set View. A pop up window will appear where you can choose the view you wish to use.

The screenshot shows a spreadsheet with columns A through E. A red box highlights the 'Set View' button in cell B1. A dropdown menu is open, listing five views: 'All Columns', 'Categorical Scores', 'Final Scores, OCS', 'PAQL, RoR, Rail', and 'Personal View'. Below the spreadsheet, a table titled 'View Name' is shown with a red border. The table has columns for 'View Name' and 'Enter an X in this row to hide columns'. The 'Personal View' row has 'X' marks under the first three columns.

View Name	Enter an X in this row to hide columns
Categorical Scores	
Final Scores, OCS	
PAQL, RoR, Rail	
Personal View	X X X

~Note~
Columns A & B cannot be hidden by Set Views.

To create a view enter the views name in Column B in the light blue area below your spreadsheets data. The enter an X in any column you wish to hide in the view



Suggested Views

	Columns Viewable	
Full View	All Columns	
Scores View	Last Name First Name Middle initial or Suffix (if needed) Previous OCS Previous Rating of Record Start Date Position Start Date 1 st Level Supervisor	Categorical scores Final Scores PAQL Scores Expected OCS 2022 OCS Delta OCS Rating of Record Any Needed Wild Cards
Rank Order View	Last Name First Name Middle initial or Suffix (if needed) OCC Series Previous OCS Previous Rating of Record Start Date Position Start Date 1 st Level Supervisor	Categorical scores Final Scores PAQL Scores Expected OCS 2022 OCS Delta OCS Rating of Record Any Needed Wild Cards
TOA View	Last Name First Name Middle initial or Suffix (if needed) 1 st Level Supervisor	Delta OCS Rating of Record Requested % to TOA Approved % to TOA



Suggested Views

	Columns Viewable	
Pre-Check	Last Name First Name Middle initial or Suffix (if needed) Presumptive Status Retained Pay Ratable Temp Promotion	Locality Code Start Date Position Start Date 1 st Level Supervisor Wild Cards



Changing Scores

	A	B	U	X	Y	Z	AA	AB	AC	AD	AE	AF	AG	AK
1	Return to Main Menu			Set Scores										
2														
3														
4	Goto Scores													
5														
6														
7	Blue arrows indicate fields set to filter the data.													
8														
9	Last Name	First Name	1st Level Sup Name	Categorical			Final			PAQL				
				Job Achievement and/or Innovation	Communication and/or Teamwork	Mission Support	Job Achievement and/or Innovation	Communication and/or Teamwork	Mission Support	Job Achievement and/or Innovation	Communication and/or Teamwork	Mission Support		
22	Cavuto	Dan	Peter Olson	3M	3M	3M	74	75	75					
23	Chalian	John	Peter Olson	3M	3M	3M	74	76						
38	Lahren	John	Peter Olson	3M	3M	3M	74	74						
39	Blitzer	Joshua	Peter Olson	3M	3M	3M	74							
52	Alvarez	William	Peter Olson	3M	3M	3M	76	74	74	3	3	3		
53	Hoang	Danielle	Peter Olson	3M	3M		71	70	71	3	3	3		
55	Cavasos	Carmen	Ike Hansen	2ML	2ML		72	40	41	3	3	3		
60	Ulanov	Uli	George Fites	2ML	2ML		73	33	34	3	3	3		
70	Cillizza	Brooke	Tammy Stewart	3M	3M		74	51	51	3	3	3		
72	Stelter	Jim	Tammy Stewart	3M	3M		75	52	50	3	3	3		
74	Williams	Wilson	Eileen Daniels	2M	2L		76	29	29	5	3	3		
75	K			2M	2M		77	36	36	3	3	3		
76	I			3M	3M		78	50	50	3	3	3		
396														
397														

1. Click on cell whose score you want to change
2. Click on cell a second time to bring up score options menu
3. Click on the score you wish to change it to from the list of options

~Tip~
 You can also change a score by just typing it in after you choose the cell, as long as it matches available options

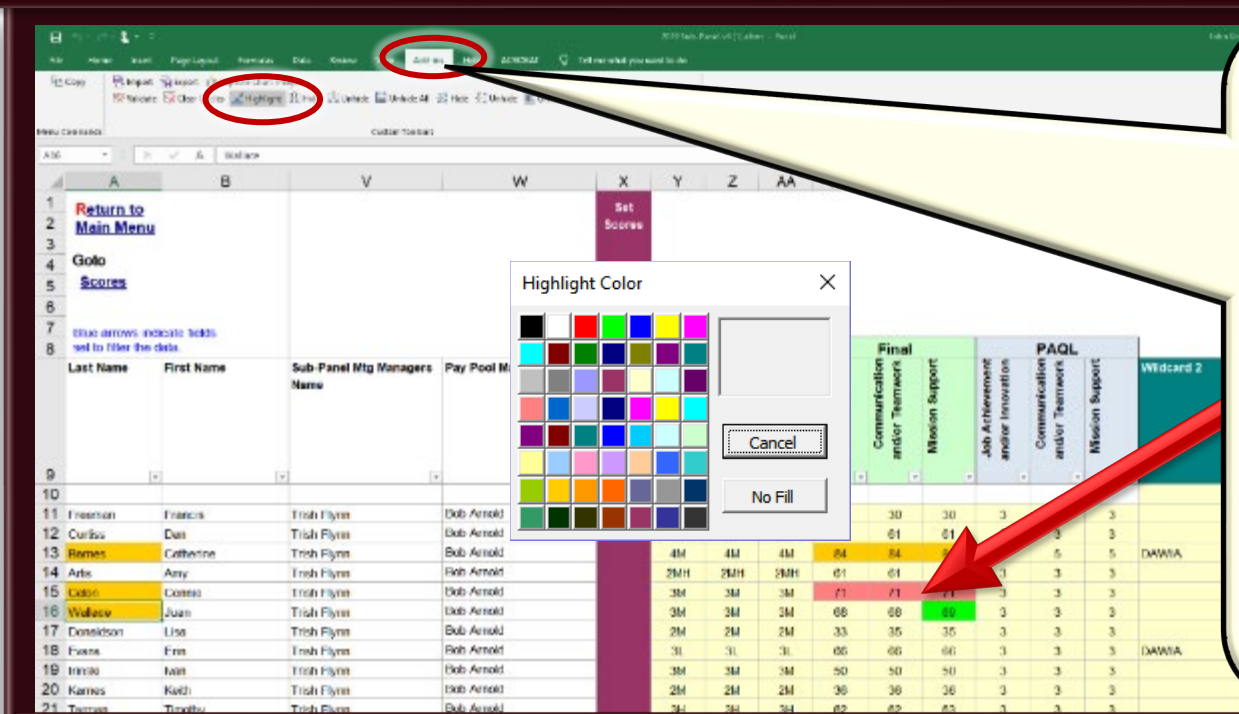


Tracking Panel Decisions

Highlighting Recommended Score Changes

Track changes to recommended scores to advise rating official(s) of change and rationale

➔ The narrative language must support the score



1. Click on "Add-ins" tab
2. Click on "Highlight" option
3. Change color of cell using pop-up color palette to indicate change
(e.g., *Light Red* for lower, *Light Green* for higher, *Yellow orange* for additional information needed)

🔊 Remember to highlight any row with sensitive data black to avoid accidental viewing



Sorting Columns

You can sort by up to 3 columns by selecting sort from the Add-ins toolbar

Each column can be sorted in either Ascending or Descending order

~Tip~
If you select a column before choosing sort from the Add-ins tool bar it will become your first sort by option

The screenshot shows an Excel spreadsheet with a 'Sort Employee Data' dialog box open. The dialog box has three 'Sort by' sections, each with a dropdown menu and radio buttons for 'Ascending' and 'Descending'. The first dropdown is set to 'E - CAS2Net ID' and 'Ascending' is selected. The spreadsheet data is as follows:

Suffix	CAS2Net ID	Paypool	Office Symbol				
	4501	AMC/LH	AMC/LHAC	1515	0	0	NH
	3905	AMC/LH	AMC/LHXTB	341	3	0	NH
	3904	AMC/LH	AMC/LHXTA	346	3	0	NH
	3903	AMC/LH	AMC/LHXSA	803	0	0	NH
	160	AMC/LH	AMC/LHXSB	346	0	0	NH
	150	AMC/LH	AMC/LHXSP	346	0	0	NH



Filters

You can filter columns to allow you to see smaller selections of the pay pool.

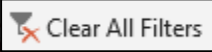
To do this, select the drop-down menu in the column header cell. Then choose which values you wish to see by checking or unchecking their boxes by left clicking on them

Select cell above heading, arrow down, and edit heading in formula bar.

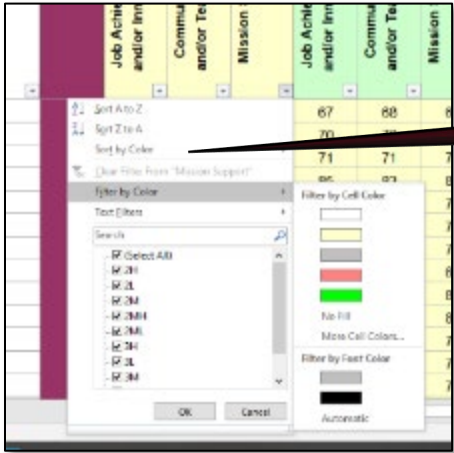
Office Symbol	Wildcard 1	Presumptive Status?	Retained Pay?	Career Path	Broadband Level	Occ Series	CY2019 B Pay
H AMC/LHXSB	343				3	0343	\$69,56
H AMC/LHAC	1515				3	1515	\$75,65
H AMC/LHAC	1515				3	1515	\$76,58
H AMC/LH	1102				3	1102	\$93,85
H AMC/LH	25				3	0025	\$79,33
H AMC/LH	25				3	0025	\$79,85
H AMC/LH	334				3	0334	\$74,98
H AMC/LH	334				3	0334	\$75,48
H AMC/LHXSA	803				3	0803	\$92,38
H AMC/LHXSA	803				3	0803	\$92,35
H AMC/LHA	1550						\$77,45
H AMC/LHA	1550						\$78,45
H AMC/LHXSB	346						\$84,98

~Tip~
The Sort options in this drop-down menu - Do Not Work -

~Tip~
You can clear filters by selecting "Clear Filter From" from the drop-down menu or by choosing From the Add-ins toolbar

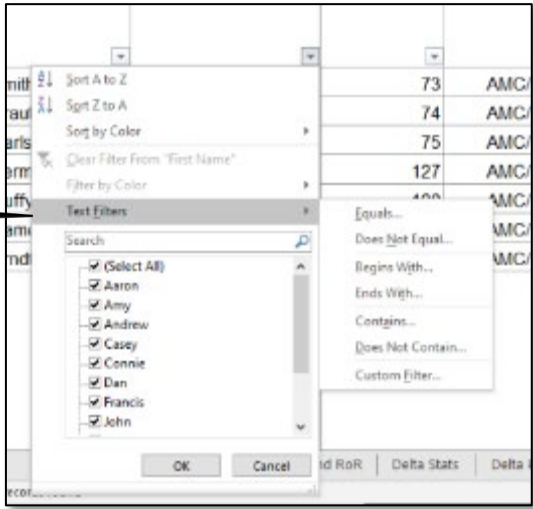


Other Filter Options

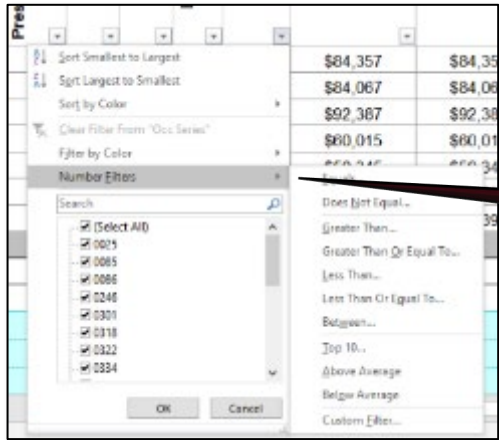


Other options are to filter by Color,

By Text,



Or by Numbers





Validating the CMS

Validate your data prior to exporting your file from the Spreadsheet.

Last Name	First Name	Middle Initial	Suffix	CASZNot ID	Start Date	1st Level Sup Name	Sub Panel Mgt Managers Name	Pay Pool Manager Name	Set Scores	Category 1	Category 2	Category 3	Category 4	Category 5	Category 6	Category 7	Category 8	Category 9	Category 10	Category 11	Category 12	Category 13	Category 14	Category 15
Miller	Karl			4502	1-Feb-99	Eileen Daniels	Triah Flynn	Bob Arnold		3M	3M	3M	76	76	74	3	3	3	DAWA			68	64-72	75
Emerson	Erica			3905	1-Feb-99	Ike Hansen	Triah Flynn	Bob Arnold														50	47-54	49
Zurbriggen	Zack			3904	1-Feb-99	George Fitek	Triah Flynn	Bob Arnold														59	56-63	61
Carlson	Robert			3903	24-Oct-00	Helen Gonzalez	Triah Flynn	Bob Arnold		3H	3M	3M	79	72	77	3	1	3	DAWA	SPRV		81	78-85	76
Miller	Ed			160	1-Feb-99	Eileen Daniels	Triah Flynn	Bob Arnold		3M	3M	3L	76	78	70	3	3	3	DAWA	SPRV		76	73-80	77

You cannot run validation while rows or columns are hidden or filters are set. If you do, you will get a warning message reminding you to unhide all columns and rows and clear all filters before running the validation macro.

Last Name	First Name	Career Path	Broadband Level	Occ Series	CY2018 Base Pay	CY2018 Use This Base Pay	Remble Temp Promotion Locality Code	Previous DCS	Previous Rating or Recor	Start Date	1st Level Sup Name	Sub-Panel Mgt Managers Name	Pay Pool Manager Name	Set Scores	Category 1	Category 2	Category 3	Category 4	Category 5	Category 6	Category 7	Category 8	Category 9	Category 10	
Miller	Karl	NH	3	0343	71,245	\$71,245	LA	69	3	1-Feb-99	Eileen Daniels	Triah Flynn	Bob Arnold		3M	3M	3M	79	72	77	3	1	3	3	DAWA
Emerson	Erica	NH	2	0341	50,345	\$50,345	LA	49	3	1-Feb-99	Eileen Daniels	Triah Flynn	Bob Arnold		3M	3M	3M	79	72	77	3	1	3	3	DAWA
Zurbriggen	Zack	NH	2	0346	60,015	\$60,015	LA	61	3	1-Feb-99	Eileen Daniels	Triah Flynn	Bob Arnold		3M	3M	3M	79	72	77	3	1	3	3	DAWA
Carlson	Robert	NH	3	0803	92,387	\$92,387	ZX	81	3	1-Feb-99	Eileen Daniels	Triah Flynn	Bob Arnold		3H	3M	3M	79	72	77	3	1	3	3	DAWA
Miller	Ed	NH	3	0346	84,067	\$84,067	LA	77	3	1-Feb-99	Eileen Daniels	Triah Flynn	Bob Arnold		3M	3M	3L	76	78	78	3	3	3	3	DAWA
Schae	Helen	NH	3	0513	69,563	\$69,563	LA	68	3	1-Feb-99	Eileen Daniels	Triah Flynn	Bob Arnold		3M	3M	3M	67	68	69	3	3	3	3	DAWA

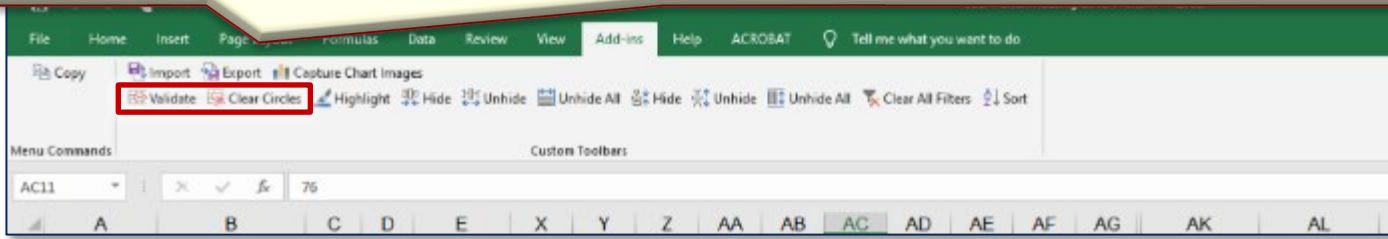


Validating the CMS (cont.)

- The CMS gives you an automated method to check for errors in your data through the validation process
 - ➔ Inconsistent data entries are circled in red, indicating an error

	A	B	C	D	E	X	Y	Z	AA	AB	AC	AD	AE	AF	AG	AK	AL
1	Return to Main Menu					Set Scores											
2	Main Menu																
3																	
4	Go to																
5	Scores																
6																	
7	Blue arrows indicate fields																
8	set to filter the data.																
	Last Name	First Name	Middle Initial	Suffix	CAS2Net ID	Categorical			Final			PAQL			Wildcard 2	Wildcard 3	
						Job Achievement and/or Innovation	Communication and/or Teamwork	Mission Support	Job Achievement and/or Innovation	Communication and/or Teamwork	Mission Support	Job Achievement and/or Innovation	Communication and/or Teamwork	Mission Support			
10																	
11	Miller	Karl			4502	3M	3M	3H	76	76	74	3	3	3	DAWIA		
12																	
13	Emerson	Erica			3905												
14	Zurbriggen	Zack			3904												
15	Carlson	Robert			3903	3H	3M	3M	79	72	77	3	1	3	DAWIA	SPRV	
16	Miller	Ed			160	3M	3M	3L	76	78	78	3	3	3		SPRV	
17																	

After clicking on the "Validate" button and correcting any highlighted inconsistencies, the "Clear Circles" button removes all red circles. You can also click on the "Validate" button again to clear the circles from corrected items, and keep the circles on any you have missed fixing.





Tabs - Matrix

The Matrix Tab gives you options to see the rank order of your entire Pay Pool. It will show the overall score of all Career Paths, then Individual Factor scores for each Career Path.

You have several options as to how to rank order the employees

Excel spreadsheet interface showing a 'Factor Matrix' tab with navigation links and two data tables: 'All Career Paths' and 'NH Career Path'.

Navigation Links:

- [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.

Ranking Options (circled in red):

- 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 Table:

2018 OCS				Lvl	Scr
NH	Chaffetz	Bill	3	85	
NH	Barnes	Catherine	4	84	
NH	Campos	Melissa	3	82	
NH	Arroyo	Peter	3	82	
NH	Starr	Suzanne	3	81	
NH	Lashinsky	Kimberley	3	81	
NH	Cooper	Erich	3	81	
NH	Kooiman	David	3	81	
NH	Smith	Kathleen	3	81	
NH	Hummer	Hershel	3	80	
NH	Amanpour	Erin	3	78	
NH	Sorenson	Sarah	3	77	
NH	Miller	Ed	3	77	
NH	Sciutto	Tom	3	77	
NH	Kileade	Brit	3	77	
NH	Carlson	Robert	3	76	
NH	Miller	Karl	3	75	
NH	Cavuto	Dan	3	75	
NH	Chalian	John	3	75	
NH	Lahren	John	3	75	
NH	Alvarez	William	3	75	
NH	Bruce	Kristin	3	74	

NH Career Path Table:

Final Scores					
Job Achievement and/or Innovation			Communication and/or Teamwork		
	Lvl	Scr		Lvl	Scr
Emerson	Erica	2	Emerson	Erica	2
Zurbriggen	Zack	2	Zurbriggen	Zack	2
Chaffetz	Bill	3	Barnes	Catherine	4
Barnes	Catherine	4	Chaffetz	Bill	3
Campos	Melissa	3	Campos	Melissa	3
Arroyo	Peter	3	Arroyo	Peter	3
Starr	Suzanne	3	Starr	Suzanne	3
Lashinsky	Kimberley	3	Lashinsky	Kimberley	3
Kooiman	David	3	Cooper	Erich	3
Smith	Kathleen	3	Kooiman	David	3

~Tip~
The Matrix Tab will not filter out sensitive information so use caution when using this tab



Tabs – Rails and RoR

The Rails and RoR Tab allows you to see the number and percentage of employees falling into different zones as compared to the payout rails. Also, it shows the number and percentage of employees receiving each Rating of Record option.

Return to Main Menu

Rails Report

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	2	25.0%	0	N/A	0	0.0%	2	15.4%
C2	6	75.0%	0	N/A	5	100.0%	11	84.6%
B	0	0.0%	0	N/A	0	0.0%	0	0.0%
Total	8	100.0%	0	N/A	5	100.0%	13	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

Performance Rating of Record

Rating of Rec	NH		NJ		NK		Total	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
1	0	0.0%	0	NA	0	0.0%	0	0.0%
3	8	100.0%	0	NA	5	100.0%	13	100.0%
5	0	0.0%	0	NA	0	0.0%	0	0.0%
Total	8	100.0%	0	NA	5	100.0%	13	100.0%

Definition of Rating Record

- Unacceptable
- Fully Successful
- Outstanding

Note: Only visible rows are included in tabulation

Upper and Lower Rails

	GS-1 Step 1	SPL base	CCS	Upper Rail	Lower Rail	SPL	
2018	\$10,526	1.0200426	min	1.00	\$20,409	\$17,306	\$18,897
			max	115.00	\$196,825	\$166,984	\$181,504

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

~Tip~
It is important to understand your organization's Compensation Strategy on how payouts can be affected by the zone in which an employee falls.



Tabs – Rails and RoR (cont.)

Further down the Rails and RoR Tab you can also see the # of employees with specific raw averages of PAQL scores by Office Symbol. Also, the # of employees with specific Delta scores by supervisor.

	1.0		3.0		3.7		4.3		5.0		Total	
	#	%	#	%	#	%	#	%	#	%		
Raw Avg PAQL by Office Symbol												
All Rated	2	18%	8	73%	1	9%		0%		0%	11	
Div 1			1	100.0%							1	
Div 2			3	100.0%							3	
DIV 2			3	100.0%							3	
Delta OCS Distribution by Supervisor												
	<= -5	-4	-3	-2	-1	0	1	2	3	4	>= 5	Total
All Rated	2	1		1		4				1	3	12
AMERICAN ROBIN	1										1	2
DEWEY WOODPECKER				1		4				1	2	7
SUPER USER	1	1										2



Tabs – Delta Stats

The Delta Stats Tab is one of the most useful tabs to ensure fairness across the pay pool. It can be used to help spot anomalies in your pay pool results.

Return to Main Menu
View Delta OCS Distribution

Delta Plot Grouping

Supervisor Wildcard Col #

Refresh Show all Hide with only one employee

Summary Statistics of Delta OCS Score

	Average Delta OCS Score	Standard Deviation
Overall	0.61	1.97
NH	0.69	2.10
NJ	-1.00	1.73
NK	0.64	1.12

			Total	
NH				
	Chris Babbitt	1.00	2.68	6
	Eileen Daniels	1.06	2.46	17
	George Files	2.50	0.71	2
	Helen Gonzalez	-0.14	2.27	7
	Ike Hansen	-1.00	0.00	2
	Peter Olson	0.47	1.77	17
	Richard Quarles	1.50	0.71	2
	Trish Flynn	0.00	N/A	1
	Zane Yatey	1.00	N/A	1
NJ				
	Tammy Stewart	-1.00	1.73	3
NK				
	Eileen Daniels	3.00	N/A	1
	Helen Gonzalez	-1.00	N/A	1
	Ike Hansen	0.25	0.96	4
	Richard Quarles	0.00	N/A	1

Contents Data Matrix Rails and R Delta Stats Delta Plot Cur OCS

This tab allows you to see both the Avg. Delta Score and Avg. Deviation from a Delta Zero. You can sort these by Supervisor or any of your Wildcards.

~Tip~
While anomalies may warrant further examination to ensure fairness within the pay pool., many times they do not require any changes in the scoring.



Tabs – Delta Stats (cont.)

- The “Delta Plot Grouping” box at the top of the Delta Stats worksheet allows you to select what you would like to see Delta Stats about. A single picklist is provided with the list of all available fields that can be utilized for grouping data.

Delta Plot Grouping

Supervisor

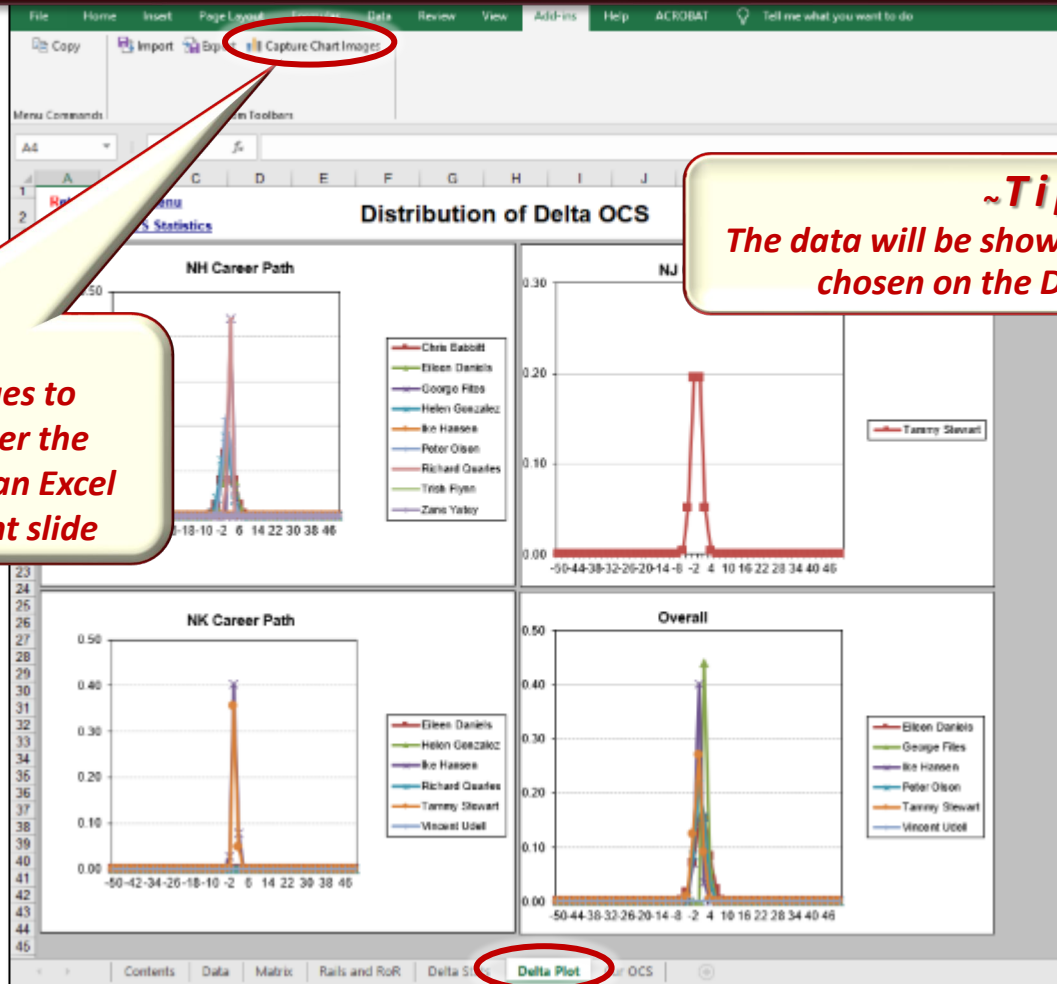
Supervisor
Wildcard 2
Wildcard 3

Supervisor
employees with
missing value of selected group



Tabs – Delta Plot

The Delta Plot Tab shows a visual representation Delta OCS. This is shown by each career path and an overall representation.



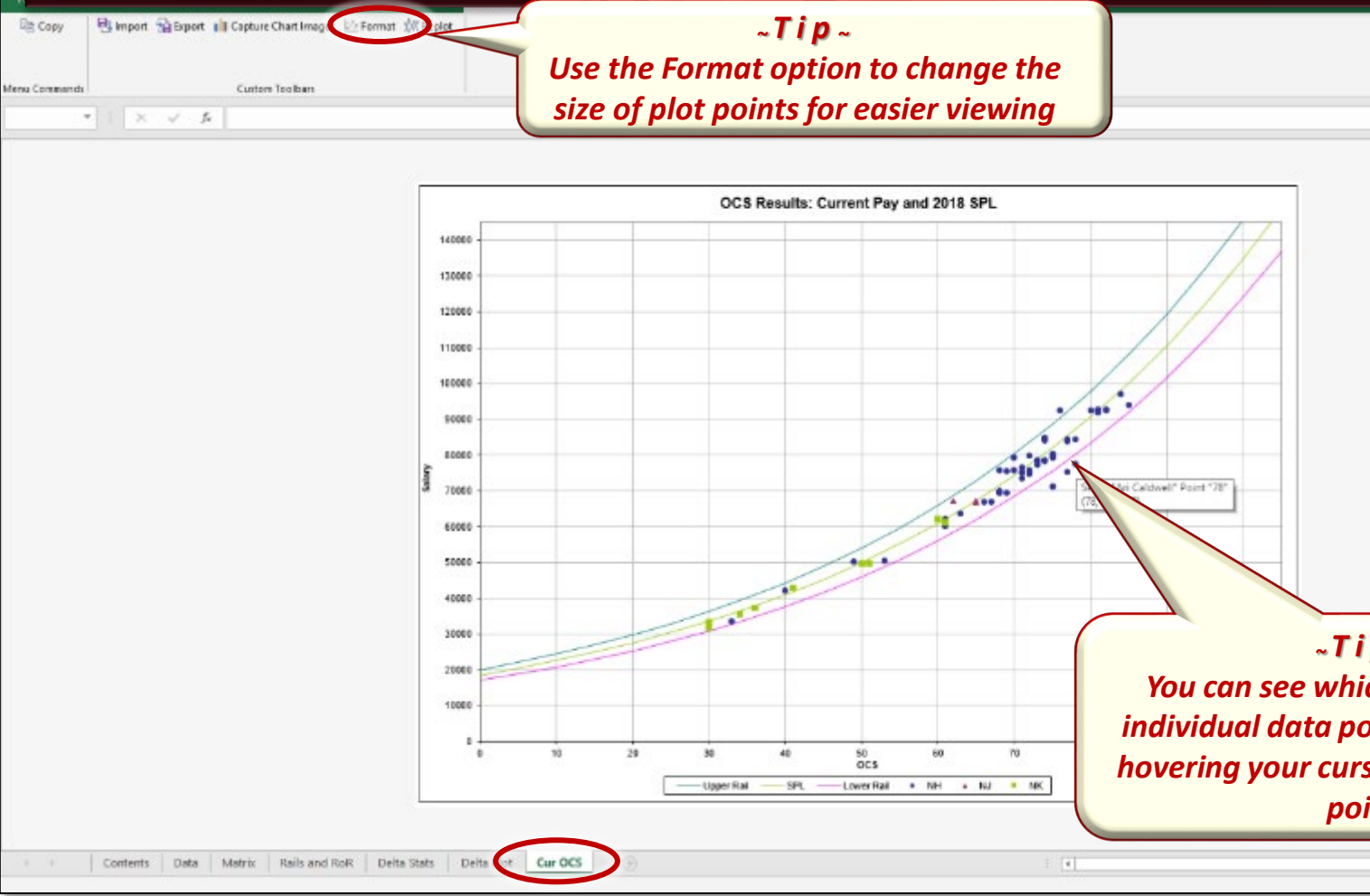
~Tip~
Us the Capture Chart Images to export the Charts from either the Delta Plot or Cur OCS Tab to an Excel Spreadsheet or a PowerPoint slide

~Tip~
The data will be shown by the sort option chosen on the Delta Stats Tab



Tabs – Cur OCS

The Cur OCS Tab shows a visual representation of an employees OCS as compared to their current salary.



~Tip~
Use the Format option to change the size of plot points for easier viewing

~Tip~
You can see which employee an individual data point represents by hovering your cursor over that data point



Group into Categories Tool



The Group into Categories Tool

The Group into Categories Tool is where employees will be rank ordered during the second phase of the Sub Pay Pool Process

Group into Categories

Career Path: All NO NC

Factor: Job Advancement and/or Innovation Communication and/or Teamwork Mission Support

Level: 1 2 3 4

Employee Movement: Up Down Left Right Unrated

Buttons: Apply, Close, Move to Unrated, Move Fans Unrated

34 (62 - 66)	35 (61 - 66)	36 (67 - 70)	37 (71 - 80)	38 (79 - 80)
Raid Richard (2) 62	Evans Erin (2) 56 Rutiz Chris (2) 56	Amaral Erin (2) 76 Bleeds B.H. (2) 77 Saults Tara (2) 77 Sorenson Sarah (2) 77 Alvarez William (2) 78 Miller Ed (2) 78 Yarbally Yolanda (2) 75 Aquilino Adam (2) 74 Blitzer Joshua (2) 74 Bruck Kristin (2) 74 Carpova Lisa (2) 74 Chelton John (2) 74 Latham John (2) 74 Caldwell Sir (2) 73 Johns Abby (2) 73 Ritz David (2) 73 Kosovic Ne (2) 73 Leman Gerald (2) 73 Timpf Jesse (2) 73 Smith John (2) 71 Blanchard Stuart (2) 71 Caban Corrie (2) 71 Duffy Mark (2) 71 Graham Miguel (2) 71 Hauchoy Casey (2) 71 Hoang Danielle (2) 70 McKinstry Douglas (2) 70 Berman Mark (2) 68 Warger Alan (2) 68 Gretter Matt (2) 68 Wrasom Victor (2) 68 Wallace Jerry (2) 67 Bla Abby (2) 67 Sizem Hale (2) 67	Arroyo Peter (2) 82 Ceresa Melissa (2) 82 Hansen Fredrick (2) 81 Kusner David (2) 81 Lathrop Amberley (2) 81 Smith Kathleen (2) 81 Ober Suzanne (2) 81 Cooper Rich (2) 80 Gertson Robert (2) 79	

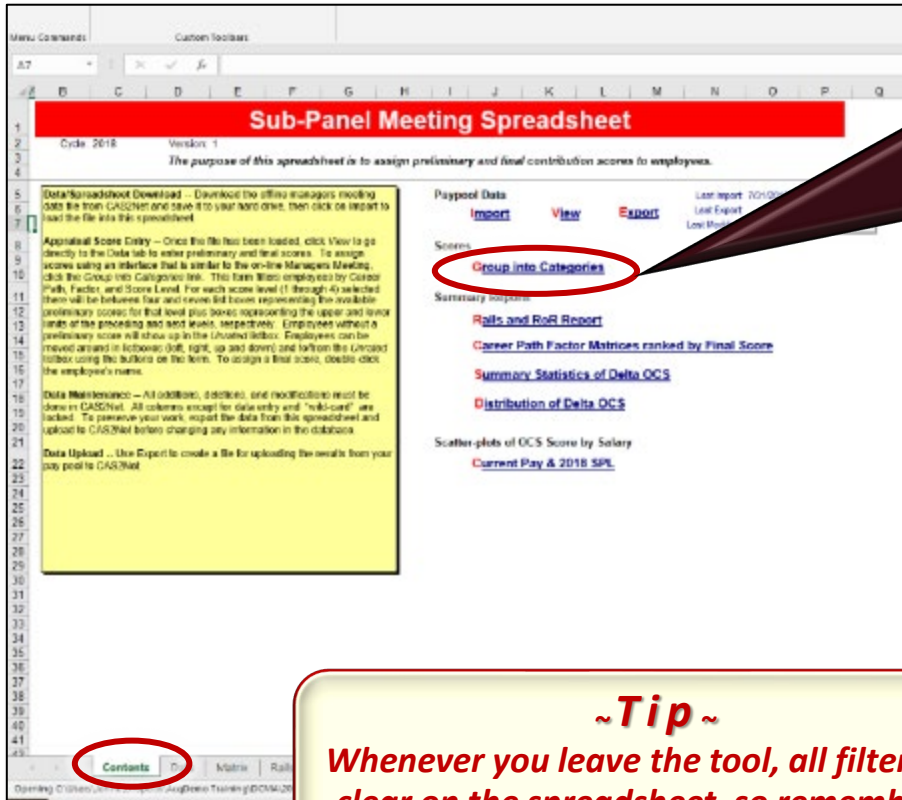
52 of 381 records found



Group into Categories Tool – How to Start

To start the “Group into Categories” tool

1. Click on “Contents” tab
2. Click on “Group into Categories” option



~Tip~
Whenever you leave the tool, all filters will clear on the spreadsheet, so remember to refilter sensitive names.

~Tip~
Before entering the Group into Categories tool, filter out any sensitive employees. (Those in the sub pay pool that some members should not see)
If you highlighted their rows black, you can do this in a column you haven't added highlights such as "start date" by choosing a color filter of "No Fill"



The Tool - Navigation

To Navigate the Group into Categories tool, select a Career Path, Broad Band Level, and Factor.

Career Path

NH NJ NK

Factor

Job Achievement and/or Innovation

Communication and/or Teamwork

Mission Support

Level

1

2

3

4

Apply

Close

The Tool will then divide all the employees by categorical score for that Career Path, Broad Band Level, and Factor.

The Tool will also show the highest-level categorical score for the previous Broad Band Level and the lowest categorical score for the next Highest



The Tool – changing categorical scores

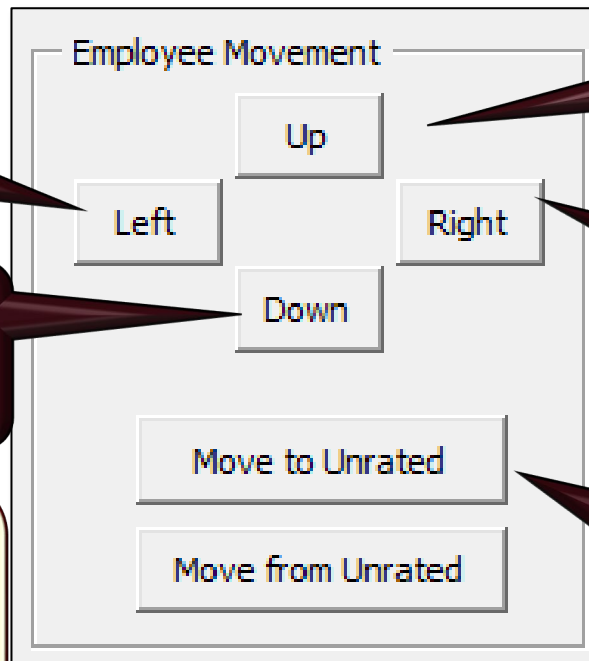
You can move Employees within the tool by selecting the employee and using the employee movement buttons

Left will lower an employee's categorical score

Down will lower an employee's position in rank order

~Tip~

When you move employees and change scores these changes also happen to the data on the spreadsheet. You will need to track these changes to highlight them after use of the tool.



Up will raise an employee's position in rank order

Right will raise an employee's categorical score

You can also move them to an unrated categorical status or from the unrated area to a categorical score



The Tool – Changing Numerical scores

3M (67 - 78)		3H (79 - 83)
Amanpour Erin (3)	78	
Kileade Brit (3)	77	
Sciutto Tom (3)	77	
Miller Ed (3)	76	
Yeakley Yolanda (3)	75	
Bila Abby (3)	71	
Bruce Kristin (3)	71	
Celon Connie (3)	71	
Duffy Mark (3)	71	
Krauthammer (3)	71	
Berman Mark (3)	69	
Borger Manu (3)	68	
Bream Matt (3)	68	
Vinson Violet (3)	68	
Wallace Juan (3)	68	
Sidner Hala (3)	67	
Smith John (3)		

Assign Integer Score

Name: Berman Mark (3)

Category: Job Achievement

Pre-Score: 3M

Final Score: 69

Apply

- 69
- 70
- 71
- 72
- 73
- 74
- 75
- 76

You can change an employee's numerical score by double clicking on the employee's name

The Assign Integer Score window will appear

You can either select a score from the drop-down menu for final score or type in a numerical score that corresponds with this categorical scores point range. Then click apply to accept the new score.

~Tip~

After changing a numerical scores, if you click apply in the navigation area, all employees will be re-rank ordered based on their numerical scores.



The Tool – use filter to examine smaller batches

To make your rank order more manageable you can filter your data on the spreadsheet before entering the tool. This will allow you to rank order smaller groups of similar employees.

30 (A7 - B)	30 (P7 - Q)
96	96
97	97
98	98
99	99
100	100
101	101
102	102
103	103
104	104
105	105
106	106
107	107
108	108
109	109
110	110
111	111
112	112
113	113
114	114
115	115
116	116
117	117
118	118
119	119
120	120
121	121
122	122
123	123
124	124
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127	127
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184	184
185	185
186	186
187	187
188	188
189	189
190	190
191	191
192	192
193	193
194	194
195	195
196	196
197	197
198	198
199	199
200	200

Non- Filtered

~Tip~
While filtering allows you to rank order smaller batches of similar employees. Always do a final rank order of the entire sub pay pool.

30 (A7 - B)	30 (P7 - Q)
96	96
97	97
98	98
99	99
100	100
101	101
102	102
103	103
104	104
105	105
106	106
107	107
108	108
109	109
110	110
111	111
112	112
113	113
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189	189
190	190
191	191
192	192
193	193
194	194
195	195
196	196
197	197
198	198
199	199
200	200

Filtered



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 pay range of the employee
- Employee with current OCS below last year's OCS
- Employee with previous years rating of record (ROR) a 5 and is now a 3
- Rating of record 5's with less delta 0 score
- Groups with much higher/lower delta then avg or rating of record (ROR)
 - Supervisor
 - Occupation 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 then 1 or 2 levels)
 - Supervisors vs Non-Supervisors
 - Other?
- Unusually high/low avg 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



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 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

~Note~

A copy of the sample spreadsheet being used should have been sent with your class invite.



Note taking

Pay Pool Note Sheet					
NAME:	Job Achievement and/or Innovation	Communication and/or Teamwork	Job Achievement and/or Innovation	Communication and/or Teamwork	Mission Support

One of the vital jobs of a Pay Pool Administrator is to record the minutes of Sub Pay Pool / Pay Pool meetings. While recording the changes on the spreadsheet is important, as equally important is the reasoning behind these changes.

These notes may help in the following areas:

- (1) to notify rating officials of scoring changes,
- (2) to understand the sub pay pool results for the pay pool, and
- (3) to provide information for grievances or requests for reconsideration.

~Tip~

Whenever possible have two pay pool administrators in any pay pool meetings. One to manage the spreadsheet and one to record the minutes of the meeting.



Taking Minutes during Pay Pool Panels

There are two main areas of focus when recording minutes for during Pay Pool Panel discussions:

Employee Scores and Appraisal Review

- Reasoning behind scoring changes
- Why further clarification may be needed in appraisal
- Justification for any scores deemed to be inappropriate/red flags

Organizational AcqDemo Processes (Lessons Learned)

- Any changes or additions needed in business rules or compensation strategy
- Appraisals that were deemed written well/poorly by panel
- Any process changes wanted/needed for future cycles

~Tip~

As a final part of the Pay Pool Panel meeting, you should review any lessons learned from this year's cycle while it is still fresh in the panel members minds



The Way Forward



Topics of Discussion



- 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 **NOT** logged in through your TEAMS or Microsoft Office account when accessing through the web browser.

https://teams.microsoft.com/l/meetup-join/19%3ameeting_NzQwY2I3MTktZml1YS00YWMOlThhY2YtMDI4MDA3ZDIzNGMw%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.mil
- 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
Basic Functions
for
Pay Pool Administrators
DoD Civilian Acquisition Workforce
Personnel Demonstration Project (AcqDemo)**

*Thank you
for attending!*