United States Department of Defense (DoD)

Acquisition Workforce Demonstration Project (AcqDemo)

Contribution-based Compensation and Appraisal System Software (CAS2Net)

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PAY POOL ANALYSIS TOOL (PAT) USER GUIDE
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Prepared for:

United States Department of Defense (DoD)
Acquisition Workforce Demonstration Project (AcqDemo)

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AcqDemo Pay Pool Analysis Tool (PAT)
User Guide

September 2023

The Microsoft Excel workbook called ***Pay Pool Analysis Tool 2023*** contains nineteen visible tabbed worksheets. The PAT was created for AcqDemo to analyze the results of the pay pool process; it provides a view across multiple pay pools. AcqDemo Personnel Policy Boards may use this tool to analyze aggregated pay pool results. Individual pay pool managers may benefit by using the PAT to review results also as it offers an analysis that goes beyond the functions of the Compensation Management Spreadsheet (CMS). This user guide details how to use the functionalities of the PAT and describes the available reports. The nineteen tabbed worksheets are described in this document in the order in which they appear along the bottom of the workbook.

Table of Contents

Table of Changes

Date of Change	Chapter(s)/ Section(s)	Topic	Remarks
Fall 2023	Data Worksheet	A new column (C) has been added to display the new column EDIPI	Used for easier matching to various other data bases
Fall 2023	Rails Report Worksheet	Added table and chart for the Rating of Record Distribution	N/A
Fall 2023	Rails Report Worksheet	Colored table headings now follow change from yellow to orange when Data tab has been filtered.	Follows the pattern of other tabs that allow for viewing statistics for filtered records
Fall 2023	Aggregate Report	Adjusted the Aggregate Report to include the new Rating of Record information added to the Rails Report Tab	N/A

Getting Started

The PAT spreadsheet is distributed using the Pay Pool Notices module of CAS2Net located at *https://cas2net.army.mil*. The spreadsheet initially comes "empty" and must be populated with data by importing one or more export files from CMS spreadsheets or files downloaded from CAS2Net Offline Interface then select Download PAT or CAS2Net Reports to select a previous fiscal year then Download PAT File(s).

Enable Macros

The macros must be enabled each time you open the spreadsheet in order for the functions to operate correctly. When opening the spreadsheet, you will likely receive a Security Warning. Select "Enable Content" to enable the macros. It is possible that you may be asked this twice. Click "Enable Content" in all cases.
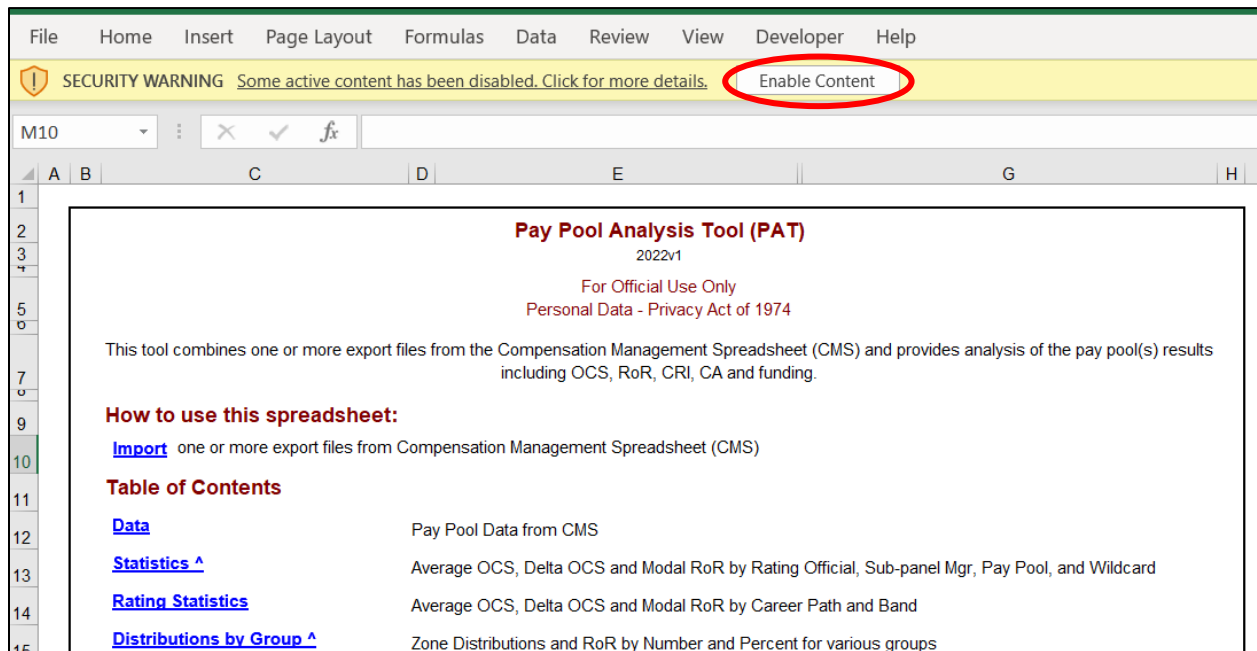
Add-Ins Menu Bar

The PAT has a custom tool bar that appears at the top of each worksheet. Click on the "Add-ins" tab on the menu to view the options for displaying, organizing, and printing data.
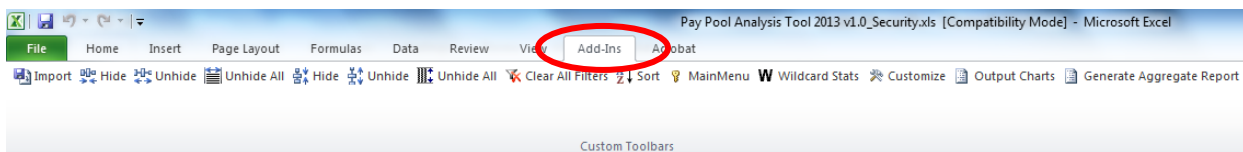
Import – Import data using this button or the "Import" link on the **Instructions** worksheet.

Hide Column – Users may hide columns from view by selecting any cell in the columns to be hidden and then clicking on this button. Single columns are selected by clicking on any cell in the column. Multiple columns are selected by holding down the <Ctrl> key while clicking on any cells in the columns, or a range of columns is selected by clicking and dragging across any row of cells in the range of columns. The first two columns (A and B) cannot be hidden by this method.

Unhide Column – Clicking this button will unhide columns you have just hidden *as long as you have not moved the cursor*. You can also unhide a specific column or range of columns by selecting cells in the columns on either side of the hidden column or range of columns, and then clicking this button.

Unhide All Columns – This button restores to view <u>all</u> hidden columns.

Hide Row – The user may hide rows from view by selecting any cell in the row or rows to be hidden and then clicking on this button. A single row is selected by clicking on any cell in the row. Multiple rows are selected by holding down the <Ctrl> key while clicking on any cells in the rows. A range of rows is selected by clicking and dragging up or down any column of cells.

Unhide Row – Clicking this button will unhide rows you have just hidden *as long as you have not moved the cursor*. You can also unhide a specific row or range of rows by highlighting cells in the rows on either side of the hidden rows or range of rows, and then clicking this button.

Unhide All Rows – This button restores to view <u>all</u> hidden rows.

Clear All Filters – This button clears all filters you have set, including filters on worksheets other than the one you are currently on. You cannot import data into the workbook with filters set. When you click the "Import" link on the **Instructions** worksheet, all filters are automatically cleared.

Sort – Allows the user to sort the rows in the worksheet by any combination of up to three columns. Sorts may be in either ascending or descending order. The sorts are specified using the standard Excel sort function.

Main Menu – This takes you to the **Instructions** worksheet with quick links to the worksheets.

Wildcard Stats – A window appears allowing you to select the Wildcard columns to be used in statistical reports. The Wildcard values are pulled from the **Data** worksheet columns title cells with dark green background. **Note**: Wildcard titles can be changed to meaningful titles.

Customize – You can reorder and rename pay pools with this button. You can also move Wildcard values into desired order.

Output Charts – Brings up a user form that allows output of any/all chart into Excel or PowerPoint format. Charts are exported as images only.

Generate Aggregate Report – Pay pools provide summary feedback to the workforce. This button generates a report that displays aggregate data for rail zones, OCS, delta OCS, salary increases and awards as well as rating of record distributions.

Instructions Worksheet

The **Instructions** worksheet (shown below) is the first sheet in the PAT. It provides a brief description of the spreadsheet, its purpose, and contents. The Import function to upload the data to be analyzed is initiated on this sheet. The Table of Contents lists the worksheets that are available to aid in your analysis. You may navigate to each worksheet by clicking on the name in the Table of Contents list or by using the tabs at the bottom of the workbook. New in 2022, any tab with a ^ at the end contains wildcard statistics or charts.

Pay Pool Analysis Tool (PAT)
2023 v1

For Official Use Only / Personal Data - Privacy Act of 1974

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

How to use this spreadsheet:

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

Table of Contents

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

Tabs with ^ include wildcard information

Scroll down the **Instructions** worksheet and you'll find status information for the data contained in your workbook, including the last Wildcard analyzed and the names (and alias if assigned) of the pay pools currently loaded into the PAT.

The pay pool alias name is an option you may use if you are interested in giving your pay pools more meaningful names. Go to the Add-ins menu bar and select the "Customize" button. Use the "Rename" feature to assign an alias name.
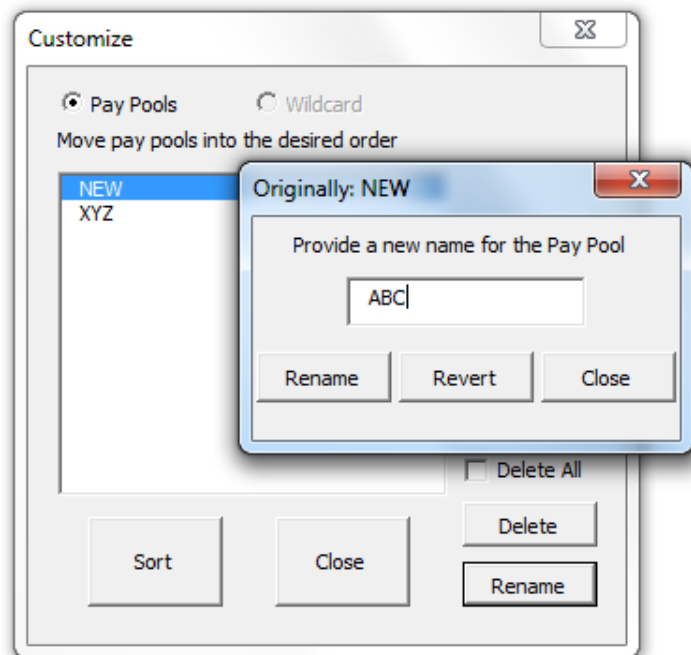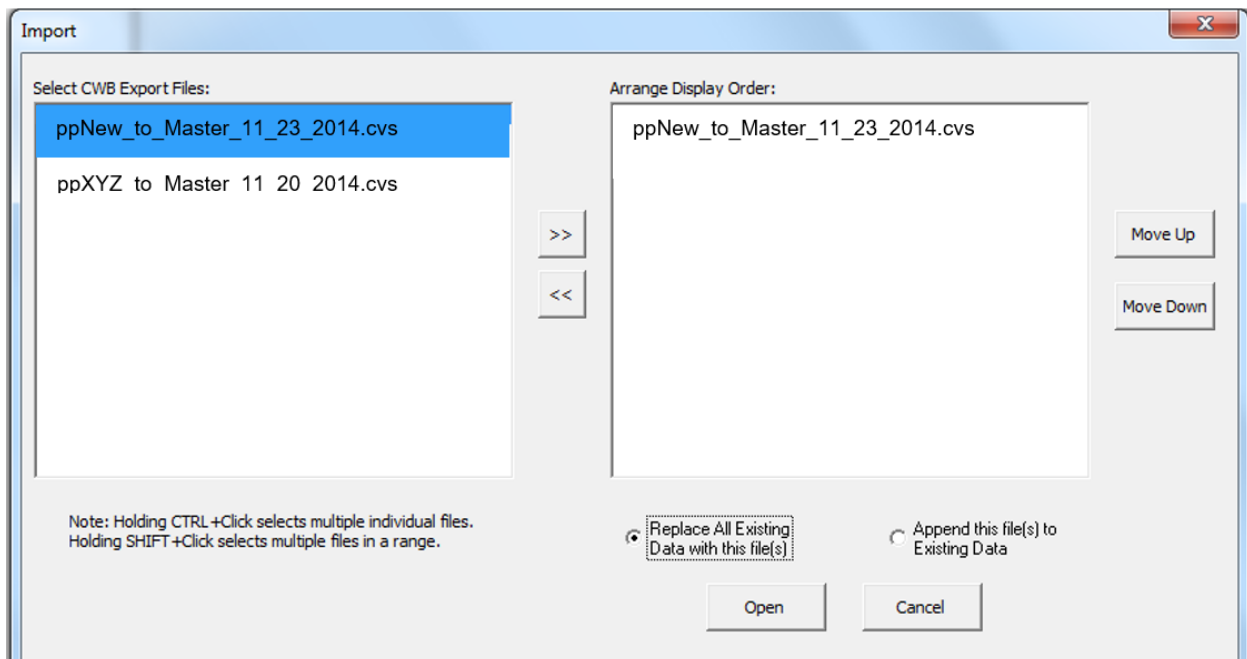

Import

The PAT initially comes "empty" and must be populated with data by importing one or more export files from CMS spreadsheets or files downloaded from CAS2Net. You may import more than one file at the same time. As a reminder, all files you want to import must be in the same folder as the PAT.

Use the following steps to import data:

1. Open the PAT and enable the macros.
2. Ensure the CMS export files you want to import are in the same folder as the PAT.
3. Select the Import function on the **Instructions** worksheet or Add-Ins menu.
4. See the available files listed in the left-hand box in the Import window.
5. Double click on the file you want to import or use the double-right facing arrow. This moves the file to the right-hand box for import. Repeat for each file you want to import.
6. Use the "Move up" and "Move down" buttons to reorder your selections. Order the pay pool files here as you would like to see them displayed in the PAT worksheets.
7. Use the radio buttons under the second box to indicate if you want the imported data to *replace* all existing data or if you want to *append* (add) the import file(s) to existing data. NOTE: It is not possible to append the same pay pool if it's data already exists in the tool. You would need to delete the old data first or choose to replace.
8. Select the "Open" button to import the selected files to the PAT.
9. A pop-up box will appear letting you know the import was successful. Select "Yes" to save the spreadsheet.

Once you have selected the files, it will take the workbook up to several minutes (depending on the size of your file(s)) to import the data and run the many macros required to generate statistics, charts, and format it properly.
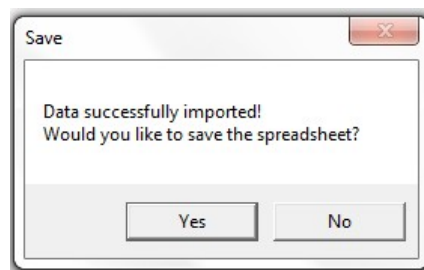
Data Worksheet

The **Data** worksheet contains pay pool data from the CMS. There are 70 visible columns in the worksheet. The columns contain data such as ratings, salary increases and awards that were calculated during the pay pool process using the CMS. Columns are read-only with the exception of the Wildcard columns. Cells E1 and E2 displays the number of pay pools and employees loaded in the PAT.

Wildcard Columns

There are 8 Wildcard columns spaced across the worksheet and they are open for editing. Wildcards may be used to review subsets of data to aid in your analysis. You may want to review the results by geographic regions, work teams, or some other criteria not defined by an existing column on the spreadsheet. Wildcard data that existed in the CMS files you imported will be available in the PAT.

You can change the wildcard groupings used in the PAT by selecting the "Wildcard Stats" button on the Add-ins menu bar (see above). The pop-up form that opens will utilize a picklist control that includes the Sub Panel column, the Office Symbol column and
any Wildcard column that contains data in the rows. Pick the column to be used and then click the button titled "Run Statistics." You will receive a message indicating the action was successful.

Clicking the button titled "Clear Statistics" will clear any previously generated wildcard statistics. A useful feature is that the dark green column labels over the Wildcard Column on the Data tab can be renamed and will show up with those labels. NOTE: in the figure below the Wildcard 2 column has been renamed Region. This will provide more meaningful titled statistics and charts for dissemination.
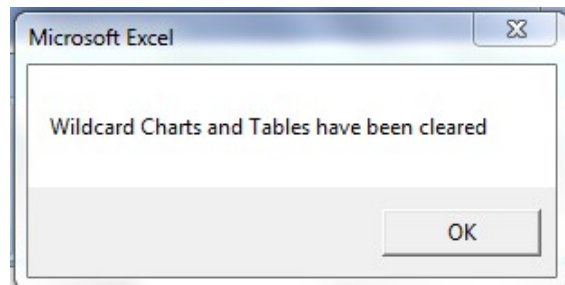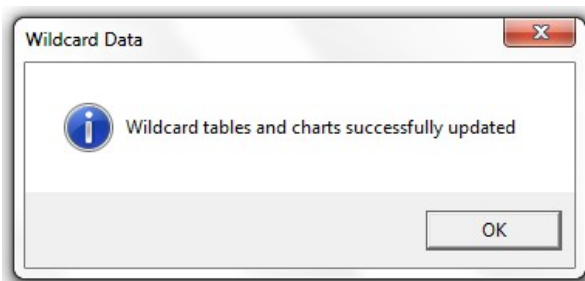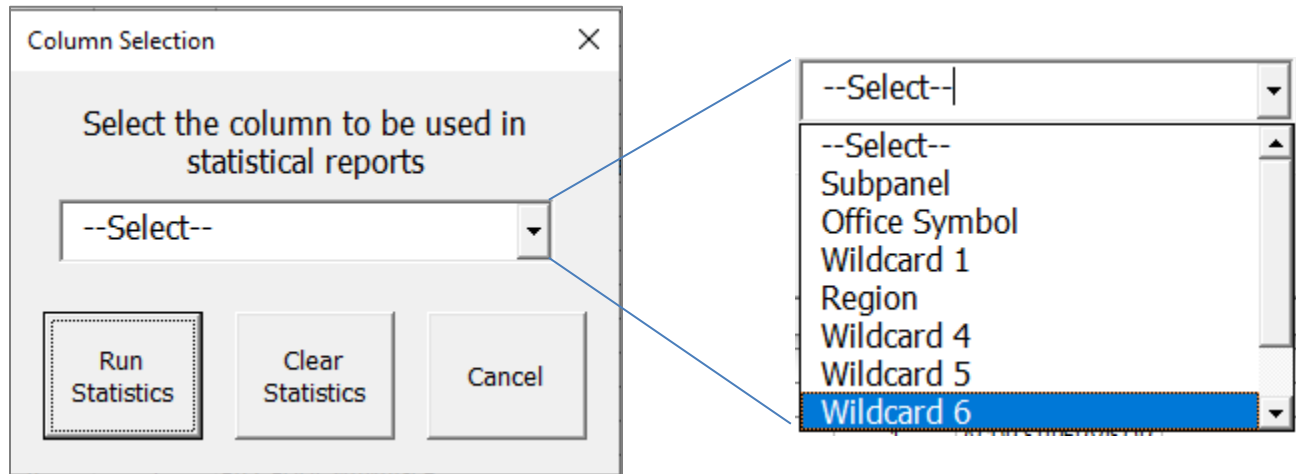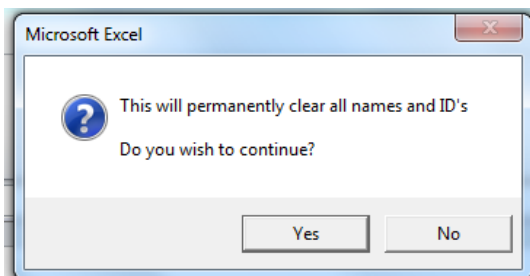

Remove Name and ID

You may elect to keep your analysis at the summary level. If so, then names and IDs of individuals may not be required. You can permanently hide names and IDs by selecting the "Remove Name and ID" button.

Last Name	First Name	CAS2Net ID	Paypool	Office Symbol	Wildcard 1	Presumptive Status?	Retained Pay?	Career Path	Broadband Level	Occ Series	End Cycle Base Salary
Appleton	Adam	2612 NEW		NEW/A	Region 1	0	0	NH	3	1550	$65,311
Arndt	Aaron	43 NEW		NEW/T	Region 1	3	0	NK	2	0322	$35,010
Artis	Amy	19 NEW		NEW/L	Region 1	0	0	NH	2	0318	$54,459
Babbitt	Chris	15 NEW		NEW/A	Region 1	0	0	NH	3	0803	$62,551
Burns	Barry	1843 NEW		NEW/T	Region 1	0	0	NH	2	1515	$30,798
Butler	Bryce	44 NEW		NEW/L	HQ	0	0	NH	4	0025	$92,351
Cavasos	Carmen	45 NEW		NEW/A	Region 1	0	0	NH	2	0246	$62,329
Celon	Connie	21 NEW		NEW/T	Region 1	0	0	NH	3	0334	$70,832
Curtiss	Dan	4 NEW		NEW/L	Region 1	0	0	NH	4	0830	$98,850
Dancy	Dyanne	46 NEW		NEW/A	Region 1	0	0	NK	1	0322	$22,543
Donaldson	Dennis	22 NEW		NEW/T	Region 1	0	0	NK	2	0318	$37,519
Emerson	Erica	47 NEW		NEW/L	Region 2	3	0	NH	2	0341	$29,180
Evans	Francis	5 NEW		NEW/A	Region 2	0	0	NH	4	0830	$103,144
Evans	Erin	23 NEW		NEW/T	HQ	0	0	NH	3	0830	$78,771
Farnsworth	Fred	24 NEW		NEW/L	Field	0	0	NH	2	0830	$42,235
Fites	George	17 NEW		NEW/A	Field	0	0	NH	3	0896	$60,469
Freeman	Francis	2 NEW		NEW/T	Field	0	1	NK	2	0318	$53,000
Garfield	George	3 NEW		NEW/L	Field	0	0	NJ	4	0856	$78,770
Gonzalez	Helen	6 NEW		NEW/A	Field	0	0	NH	4	0340	$95,535
Grimes	Garth	25 NEW		NEW/T	Field	0	0	NH	2	0850	$33,576
Hansen	Ike	18 NEW		NEW/L	Field	0	0	NH	3	0830	$92,787
Harris	Henry	26 NEW		NEW/A	Field	0	0	NH	2	0830	$57,983
Hoang	Danielle	2572 NEW		NEW/T	Field	0	0	NH	3	0025	$63,655
Hoang	Andrew	2571 NEW		NEW/L	Field	0	0	NJ	1	0019	$20,367
Hoang	Eric	2574 NEW		NEW/A	Field	0	0	NJ	1	0332	$21,203
Hummer	Hershel	2611 NEW		NEW/T	Field	0	0	NH	3	0893	$69,618
Irinski	Ivan	27 NEW		NEW/L	Field	0	0	NK	3	0085	$49,462

A warning pop-up window will ask if you want to continue. Clicking "Yes" will *permanently* hide columns A, B and C from the PAT. A box will appear in the upper left-side corner of the **Data** worksheet to confirm the names and IDs are securely hidden.

Statistics Worksheet

The **Statistics** worksheet provides the average rating, average delta OCS, modal rating of record, number of employees and number of employees rated by supervisor, sub-panel manager, pay pool and Wildcard (in this case, Office Symbol was chosen from the Wildcard form) if this option was selected.

☐ Only visible rows from Data tab

Composite Pay Pool Statistics

	Average Rating	Average Delta OCS	Modal RoR	Number of Employees	Employees Rated
Entire Population	76.6	-0.4	3	20	16
Pay Pool					
4001	76.6	-0.4	3	20	16
Sub-Panel					
A	72.9	-0.8	3	14	11
B	84.6	0.4	5	6	5
Rating Official					
ACDP SUPERVISOR	59.5	0.3	3	7	4
AMERICAN ROBIN	79.2	1.0	5	5	5
DEWEY WOODPECKER	74.8	-4.3	3	5	4
PAY POOL MANAGER	97.3	1.3	3	3	3
Office Symbol					
Div 1	78.0	1.0	3,5	4	4
Div 2	74.8	-4.3	3	4	4
Div 3	59.5	0.3	3	4	4
HQ	94.0	1.3	3	4	4

Instructions | Data | **Statistics** | Rating Statistics | Distributions by Group | Distributi

Number of Employees reflects the count of all employees in the Data worksheet regardless of presumptive status. All other statistics on this page exclude Presumptive Due to Time employees.

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Filtered Data Option

The "Statistics" tab is the first encountered with the new feature added in 2022. Notice at the top left corner, the red circled checkbox labeled "Only visible rows from Data tab" If this box is checked then the data on the sheet will give results from only the visible rows on the data tab. The colored highlight rows change color from yellow to pale orange to reflect the data results are from filtered data. This functionality exists on 6 other tabs as well and on their associated graphs. Tabs listed here with an * have graphs on different tabs than the data. Rating Statistics, Distributions by Group *, Payout Statistics *, Payout Stats by Group *, Net Draw Analysis *, Enhanced Flexibilities

Composite Pay Pool Statistics

	Average Rating	Average Delta OCS	Modal RoR	Number of Employees	Employees Rated
Entire Population	48.1	-0.9	3	20	16
Pay Pool					
4001	77.0	-1.5	3	13	10
Sub-Panel					
A	77.6	-2.0	3	9	7
B	75.7	-0.3	5	4	3
Rating Official					
ACDP SUPERVISOR	78.5	-1.0	3,5	4	2
AMERICAN ROBIN	79.2	1.0	5	5	5
DEWEY WOODPECKER	72.3	-6.0	3	4	3
PAY POOL MANAGER				0	0
Office Symbol					
Div 1	78.0	1.0	3,5	4	4
Div 2	74.8	-4.3	3	4	4
Div 3	59.5	0.3	3	4	4
HO	94.0	1.3	3	4	4

Instructions | Data | **Statistics** | Rating Statistics | Distributions by Group | Distribut

Below is an illustration of the change in graphs affected by the new feature. The top graph uses solid bars that signify all data is included in these values. The second graph shows partially colored bars to signify that the data uses only the filtered data.

Average CRI Increase % by Career Path

1.95%	0.26%	3.53%
NH	NJ	NK
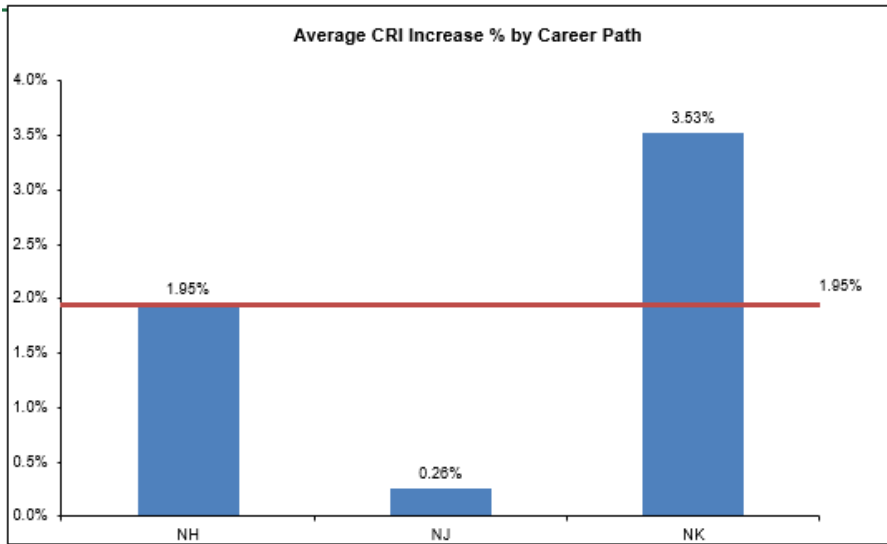
Full Color
= All Data (no Filter)

Average CRI Increase % by Career Path

1.41%	0.26%	3.53%
NH	NJ	NK
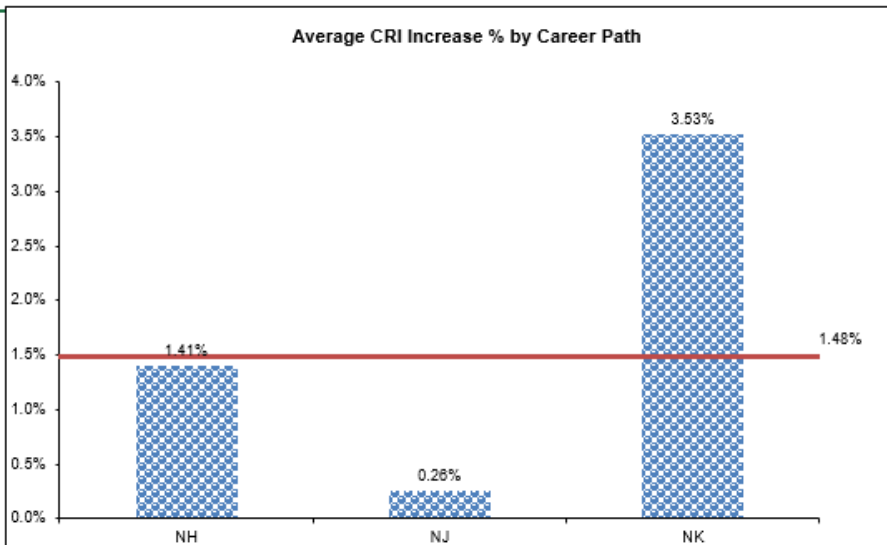
Partial Color
= Filtered Data

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Rating Statistics Worksheet

The **Rating Statistics** worksheet displays average OCS, average delta OCS and Modal Rating of Record for each career path and broadband level. The Overall column shows the combined averages for all imported pay pools and columns to the right show averages for each pay pool. ***Employees in a Presumptive Due to Time status are not included.***

	Overall	4001
□ Only visible rows from Data tab		
Rating Statistics *Analyzed Population does not include Presumptives Due to Time*		
Analyzed Population	16	16
Average OCS	76.6	76.6
NH-1		
NH-2		
NH-3	76.3	76.3
NH-4	93.5	93.5
NJ-1		
NJ-2	36.0	36.0
NJ-3	83.0	83.0
NJ-4		
NK-1		
NK-2	45.0	45.0
NK-3		
Average Delta OCS	-0.4	-0.4
NH-1		
NH-2		
NH-3	-1.7	-1.7
NH-4	1.3	1.3
NJ-1		
NJ-2	1.0	1.0
NJ-3	0.0	0.0
NJ-4		
NK-1		
NK-2	2.0	2.0
NK-3		
Modal Rating of Record	3	3
NH-1		
NH-2		
NH-3	3,5	3,5
NH-4	3	3

Distributions by Group Worksheet

The **Distributions by Group** worksheet now provides three sets of distribution tallies. It shows counts and percentages of employees by rail position, by performance rating, and new in 2022 by raw average PAQL across a variety of groups.   Modal Rating for these groups is presented also. Distributions are shown by pay pool, career path, broadband, career path/band, Wildcard, and the entire population. All statistics on this worksheet exclude Presumptive Due to Time.

	B	E	F	G	H	I	J	K	L	M
1								**Zone Distribution by Group**		
2	☐ Only visible rows from Data tab							Does not include presumptive due to time		
3		Number of Employees Not Rated					Zone Distribution			
4			A	C1	C2	B	A	C1	C2	B
5										
6	Entire Population:	4	1	2	13	0	6.3%	12.5%	81.3%	0.0%
7										
8	**Pay Pool**									
9										
10	4001	4	1	2	13	0	6.3%	12.5%	81.3%	0.0%
11										
12	**Career Path**									
13										
14	NH	1	1	1	11	0	7.7%	7.7%	84.6%	0.0%
15	NJ	2	0	1	1	0	0.0%	50.0%	50.0%	0.0%
16	NK	1	0	0	1	0	0.0%	0.0%	100.0%	0.0%
17										
18	**Band**									
19										
20	2	1	0	0	2	0	0.0%	0.0%	100.0%	0.0%
21	3	3	1	2	7	0	10.0%	20.0%	70.0%	0.0%
22	4	0	0	0	4	0	0.0%	0.0%	100.0%	0.0%
23										
24	**Career Path/Band**									
25										
26	NH-3	1	1	1	7	0	11.1%	11.1%	77.8%	0.0%
27	NH-4	0	0	0	4	0	0.0%	0.0%	100.0%	0.0%
28	NJ-2	0	0	0	1	0	0.0%	0.0%	100.0%	0.0%
29	NJ-3	2	0	1	0	0	0.0%	100.0%	0.0%	0.0%
30	NK-2	1	0	0	1	0	0.0%	0.0%	100.0%	0.0%
31										
32	**Office Symbol**									
33										
34	Div 1	0	0	1	3	0	0.0%	25.0%	75.0%	0.0%
35	Div 2	0	1	0	3	0	25.0%	0.0%	75.0%	0.0%

Rail Positions
A = above the upper rail
B = below the lower rail
C1 = above the standard pay line but on or below the upper rail
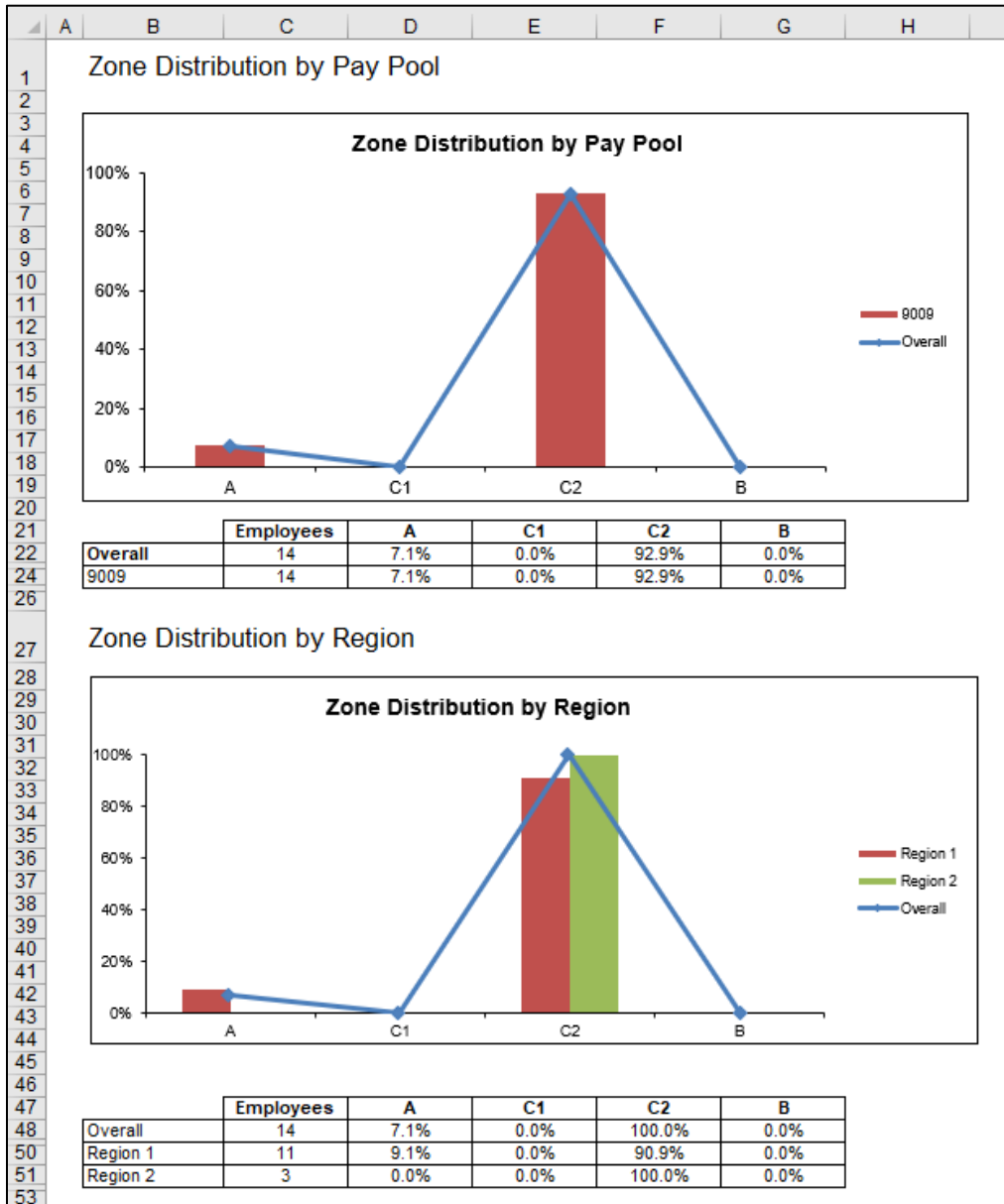C2 = on or below the standard pay line but on or above the lower rail

	B	E	N	O	P	Q	R	S	T
1	☐ Only visible rows from Dat								
2									
3		Number of Employees Not Rated			Rating of Record Distribution				
4			1	3	5	1	3	5	Modal RoR
5									
6	Entire Population:	4	1	11	4	6.3%	68.8%	25.0%	3
7									
8	Pay Pool								
9									
10	4001	4	1	11	4	6.3%	68.8%	25.0%	3
11									
12	Career Path								
13									

Above is the distribution of Rating of Record and the Modal Rating. And below shows the new columns added in Fall 2022. These additional columns tally the raw average PAQL. Distributions and their corresponding percentage of the population.

	B	E	U	V	W	X	Y	Z	AA	AB	AC	AD
1	☐ Only visible rows from Dat											
2												
3		Number of Employees Not Rated				Raw Average PAQL Distribution						
4			1.0	3.0	3.7	4.3	5.0	1.0	3.0	3.7	4.3	5.0
5												
6	Entire Population:	4	0	11	1	2	2	0.0%	68.8%	6.3%	12.5%	12.5%
7												
8	Pay Pool											
9												
10	4001	4	0	11	1	2	2	0.0%	68.8%	6.3%	12.5%	12.5%
11												
12	Career Path											
13												
14	NH	1	0	8	1	2	2	0.0%	61.5%	7.7%	15.4%	15.4%

Distribution Charts by Group Worksheet

The **Distribution Charts by Group** worksheet displays zone and rating of record distribution by pay pool and wildcard. The top chart is a bar graph displaying zone distributions overall and by each pay pool loaded in the PAT. The bottom chart shows the distribution by the Wildcard groupings. Both charts have a trend line showing the average across the groupings.

Zone Distribution by Pay Pool

	Employees	A	C1	C2	B
Overall	14	7.1%	0.0%	92.9%	0.0%
9009	14	7.1%	0.0%	92.9%	0.0%

Zone Distribution by Region

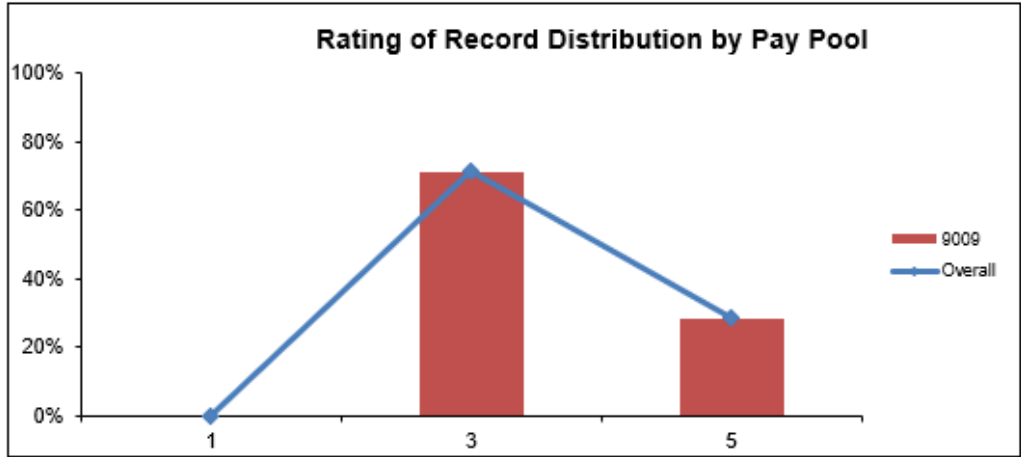|	Employees	A	C1	C2	B
Overall	14	7.1%	0.0%	100.0%	0.0%
Region 1	11	9.1%	0.0%	90.9%	0.0%
Region 2	3	0.0%	0.0%	100.0%	0.0%

Rail Positions
A = above the upper rail
B = below the lower rail
C1 = above the standard pay line but below the upper rail see above
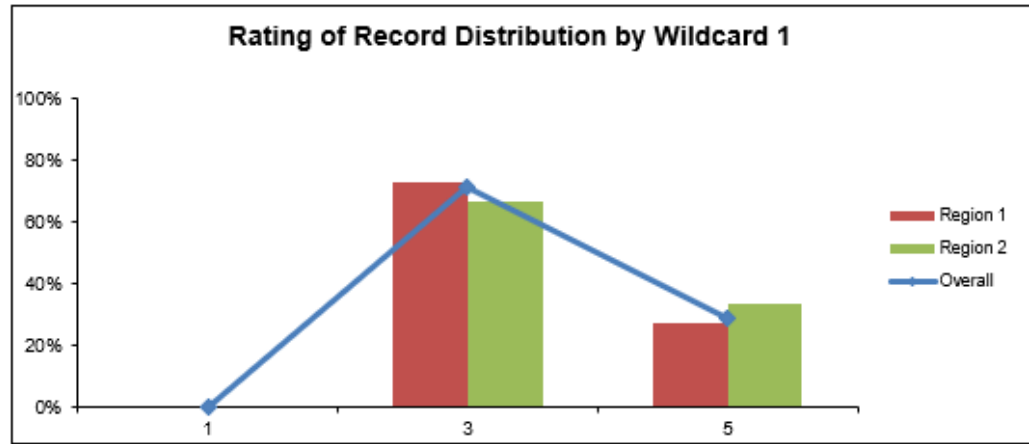C2 = on or below the standard pay line but above the lower rail

J	K	L	M	N	O	P	Q	R

Rating of Record Distribution by Pay Pool

Rating of Record Distribution by Pay Pool

	Employees	1	3	5
Overall	14	0.0%	71.4%	28.6%
9009	14	0.0%	71.4%	28.6%

Rating of Record Distribution by Region

Rating of Record Distribution by Wildcard 1

	Employees	1	3	5
	14	0.0%	71.4%	28.6%
Region 1	11	0.0%	72.7%	27.3%
Region 2	3	0.0%	66.7%	33.3%

21

Payout Statistics Worksheet

The **Payout Statistics** worksheet provides statistics on salary increases, awards and related data across all pay pools and by each pay pool. The majority of the worksheet provides the minimum, average, median, and maximum in terms of dollar amounts and percentages for salary increases and awards. Specifically, the following data elements are provided: Presumptive Due to Time employees are not included.

- Analyzed Population – Overall and by each individual pay pool loaded in the PAT
- Average OCS
- Average Delta OCS
- Alpha 1 (CRI) – Percent applied to delta salary to buy back the difference between employees' current salaries and the target salaries for CRI
- Alpha 2 (CA) – Percent applied to delta salary to buy back the difference between employees' current salaries and the target salaries for CA
- Salary Increase $ - Minimum (non-zero), Average, Median, Maximum
- Salary Increase % of Basic Pay - Minimum (non-zero), Average, Median, Maximum
- Supervisor Differential – Number receiving and old and new average %
- Flags – Override CRI, Override CA, Disable Rollover, Force Rollover
- Control Points – Number with Control Points Entered, Number Stopped at Control Point
- CRI Split to Salary
- Carryover Award $ – Number of Carryover Awards, Minimum (non-zero), Average, Median, Maximum
- Carryover Award % - Minimum (non-zero), Average, Median, Maximum
- CA Award $ - Minimum (non-zero), Average, Median, Maximum
- CA Award % of Total Pay- Minimum (non-zero), Average, Median, Maximum
- Award (Carryover + CA) Total - Minimum (non-zero), Average, Median, Maximum
- Award Total % of Total Pay- Minimum (non-zero), Average, Median, Maximum

Note: Carryover statistics only include employees receiving a carryover award. Salary increases and CA awards are based on all employees except Presumptive Due to Time.

The following page visualizes the statistics found in this page.

☐ Only visible rows from Data tab

Payout Statistics

Analyzed population excludes Presumptive Due to Time

|	Overall	4001
Analyzed Population	16	16
Average OCS	76.6	76.6
Average Delta OCS	-0.4	-0.4
Alpha 1 (CRI)	1.0000	1.0000
Alpha 2 (CA)	0.2839	0.2839
Salary Increase $		
Min (non-zero)	$85	$85
Average	$1,215	$1,215
Median	$698	$698
Max	$6,491	$6,491
Salary Increase % of Basic Pay		
Min (non-zero)	0.10%	0.10%
Average	1.26%	1.26%
Median	0.73%	0.73%
Max	5.20%	5.20%
Supervisor Differential		
Number Receiving	1	1
old % Average *	10.00%	10.00%
new % Average *	10.00%	10.00%

Flags
- Override CRI
- Override CA
- Disable Rollover (0)
- Force Rollover (2)

Control Points
- # with CP Entered
- # Stopped At CP

CRI Split to Salary
- # with Split Entered
- Average Split % Entered

Carryover Award $
- # Carry Over Awards
- Min (non-zero)
- Average*
- Median*
- Max

Carryover Award % of Base Pay
- Min (non-zero)
- Average*
- Median*
- Max

CA Award $
- Min (non-zero)
- Average
- Median
- Max

CA Award % of Total Pay
- Min (non-zero)
- Average
- Median
- Max

Award Total $
- Min (non-zero)
- Average
- Median
- Max

Award Total % of Total Pay
- Min (non-zero)
- Average
- Median
- Max

Payout Charts Worksheet

The **Payout Charts** worksheet displays the payout statistics provided in the **Payout Statistics** worksheet in chart form. The charts are bar graphs showing average percent and average dollar amount by pay pool. A trend line shows the average across pay pools. This worksheet contains the following charts:

- Alpha 1 (for CRI)
- Alpha 2 (for CA)
- Average Salary Increase
- Average Carryover Award
- Average Contribution Award
- Average Total Award
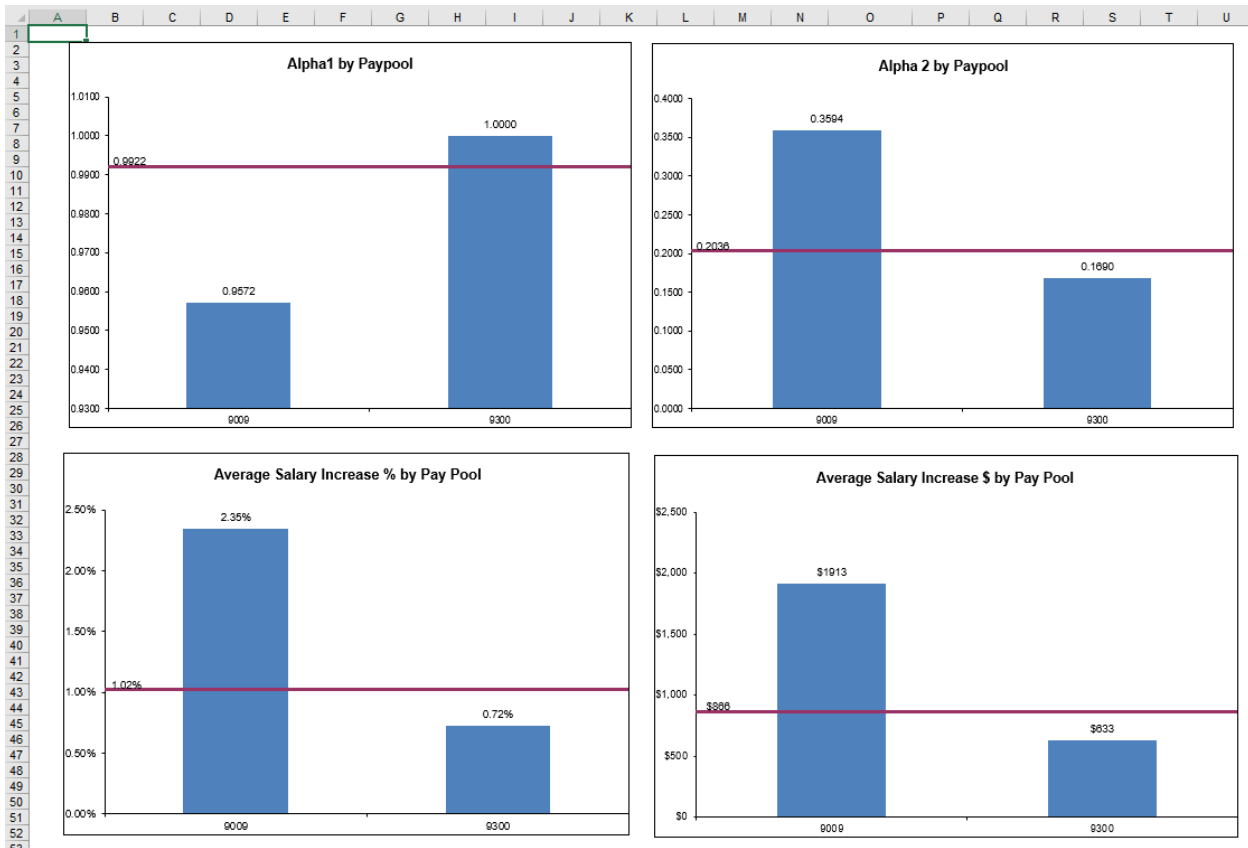
Payout Statistics by Group Worksheet

The **Payout Statistics by Group** worksheet provides statistics on salary increase and award, both dollar amount and percent, by various groups and Wildcard. Statistics are shown for the entire population and by pay pool, career path, broadband, career path/band, and Wildcard. Statistics are averaged across those receiving and then by the entire population (exclusive of Presumptive Due to Time)

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Payout Statistics by Group
(Presumptive due to time excluded)

----------- Averaged Across Only Those Receiving the Payment --------------

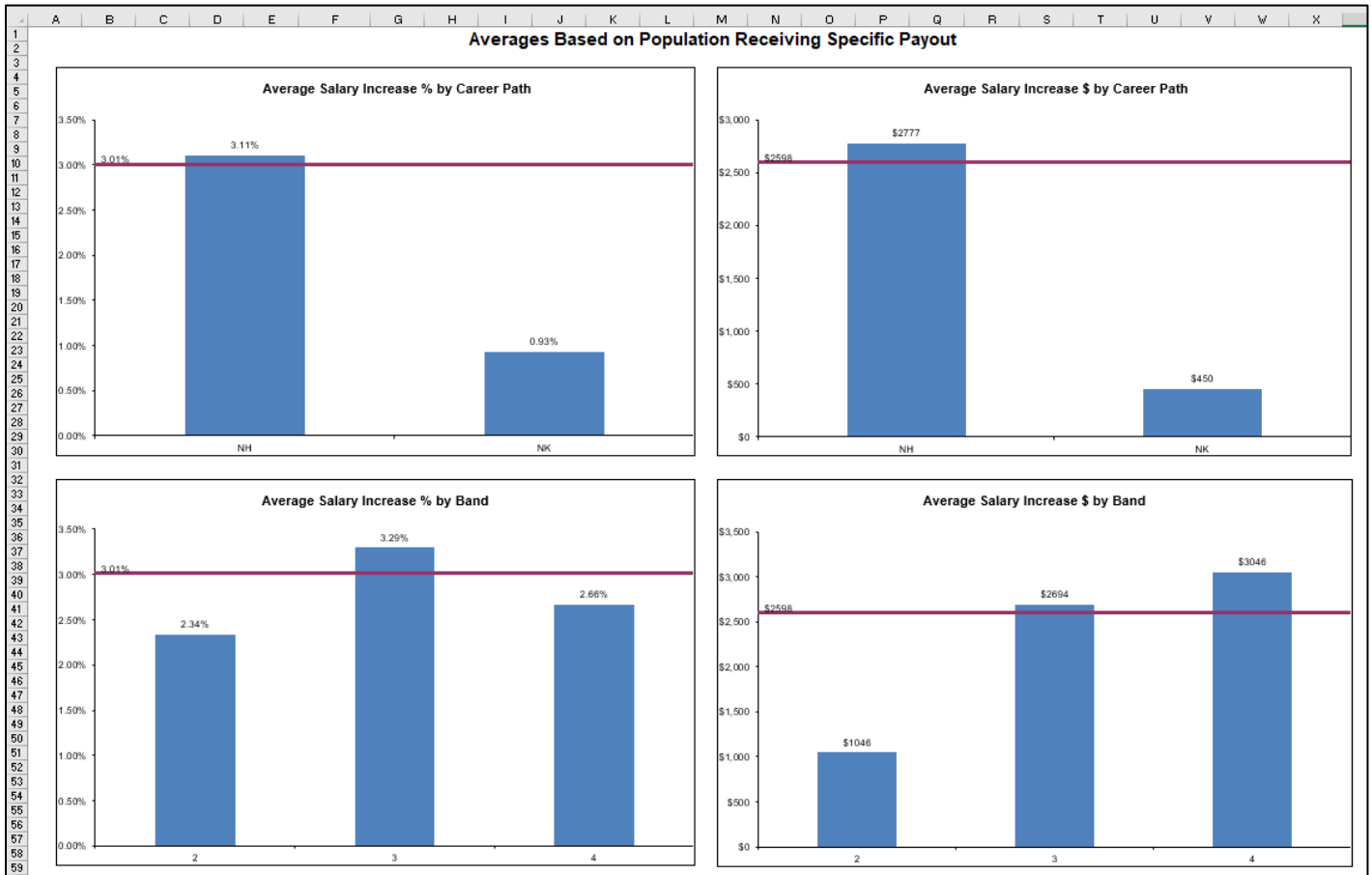|	Number of Employees Analyzed	Average OCS	Average Delta OCS	Average CRI (Salary) Increase [1]			Average Carryover [1]			Average CA Award [2]		
				Number Receiving	$	%	Number Receiving	$	%	Number Receiving	$	%
Entire Population:	16	76.6	-0.4	11	$1,767	1.95%	5	$1,215	1.34%	15	$2,297	2.06%
Career Path												
NH	13	81.6	-0.8	9	$1,968	1.95%	4	$1,442	1.40%	12	$2,453	2.02%
NJ	2	59.5	0.5	1	$102	0.26%	1	$309	0.77%	2	$1,612	1.94%
NK	1	45.0	2.0	1	$1,625	3.53%	0	$0	0.00%	1	$1,798	3.36%
Band												
2	2	40.5	1.5	2	$864	2.01%	1	$309	0.77%	2	$1,465	2.94%
3	10	77.0	-1.5	6	$1,158	1.25%	3	$1,828	1.90%	9	$2,122	1.91%
4	4	93.5	1.3	3	$3,588	3.04%	1	$283	0.23%	4	$3,107	2.16%
Career Path/Band												
NH-3	9	76.3	-1.7	6	$1,158	1.25%	3	$1,828	1.90%	8	$2,126	1.93%

☐ Only visible rows from Data tab

----------- Averaged Across the Whole Analyzed Population --------------

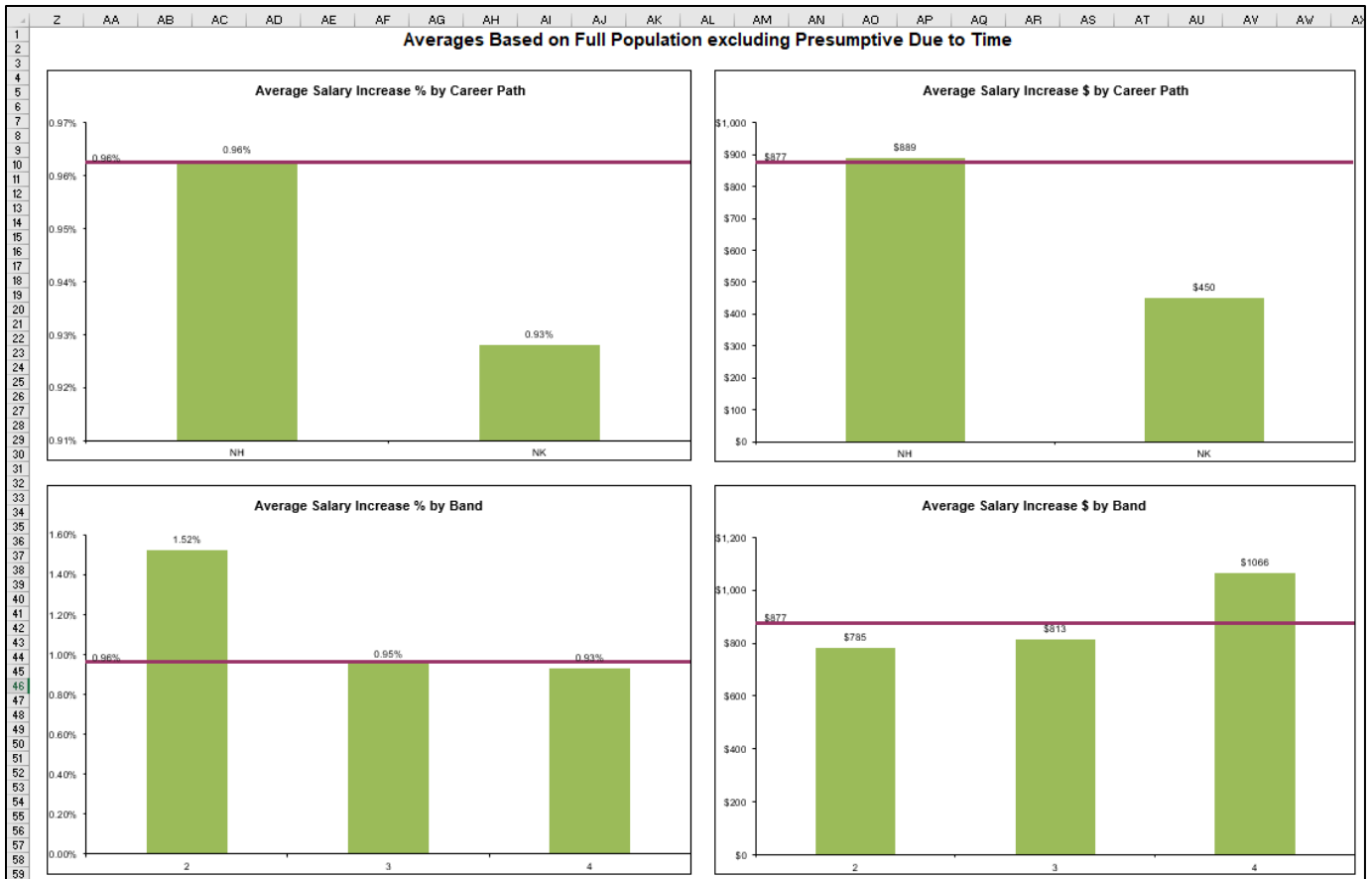|	Number of Employees Analyzed	Average CRI (Salary) Increase [3]			Average Carryover [3]			Average CA Award [4]		
		Number Receiving	$	%	Number Receiving	$	%	Number Receiving	$	%
Entire Population:	16	11	$1,215	1.27%	5	$380	0.40%	15	$2,153	1.94%
Career Path										
NH	13	9	$1,362	1.33%	4	$444	0.43%	12	$2,264	1.89%
NJ	2	1	$51	0.07%	1	$155	0.22%	2	$1,612	1.94%
NK	1	1	$1,625	3.53%	0	$0	0.00%	1	$1,798	3.36%
Band										
2	2	2	$864	2.01%	1	$155	0.36%	2	$1,465	2.94%
3	10	6	$695	0.74%	3	$548	0.58%	9	$1,910	1.73%
4	4	3	$2,691	2.16%	1	$71	0.06%	4	$3,107	2.16%
Career Path/Band										
NH-3	9	6	$772	0.83%	3	$609	0.65%	8	$1,889	1.73%

Payout Charts by Group Worksheet

The **Payout Charts by Group** displays bar charts of the statistics ($ and %) provided by **Payout Statistics by Group** worksheet. A trend line shows the average across pay pools. This worksheet contains the following charts:

- Average Salary Increase by Career Path
- Average Salary Increase by Band
- Average Salary Increase by Career Path/Band
- Average Total Award by Career Path
- Average Total Award by Band
- Average Total Award by Career Path/Band
- Average Carryover Award by Career Path
- Average Carryover Award by Band
- Average Carryover Award by Career Path/Band

The blue bar charts reflect the statistics that are dependent on population receiving. The green bar charts (on the following page) reflect the statistics across the whole population (except Presumptive Due to Time).

Averages Based on Full Population excluding Presumptive Due to Time

Average Salary Increase % by Career Path

- 0.96% (reference line)
- NH: 0.96%
- NK: 0.93%

Average Salary Increase $ by Career Path

- $877 (reference line)
- NH: $889
- NK: $450

Average Salary Increase % by Band

- 0.96% (reference line)
- 2: 1.52%
- 3: 0.95%
- 4: 0.93%

Average Salary Increase $ by Band

- $877 (reference line)
- 2: $785
- 3: $813
- 4: $1066

Payout Charts by Wildcard Worksheet

The **Payout Charts by Wildcard** worksheet displays bar charts of the statistics ($ and %) for the Wildcard selected for analysis on the **Payout Statistics by Group** worksheet. A trend line shows the average across groups. Similar to the Payout Charts by Group, there are blue bar charts dependent on receiving the increase vs green bar charts for the entire population. This worksheet contains the following charts:

- Average Salary Increase by Wildcard
- Average Carryover Award by Wildcard
- Average Total Award by Wildcard
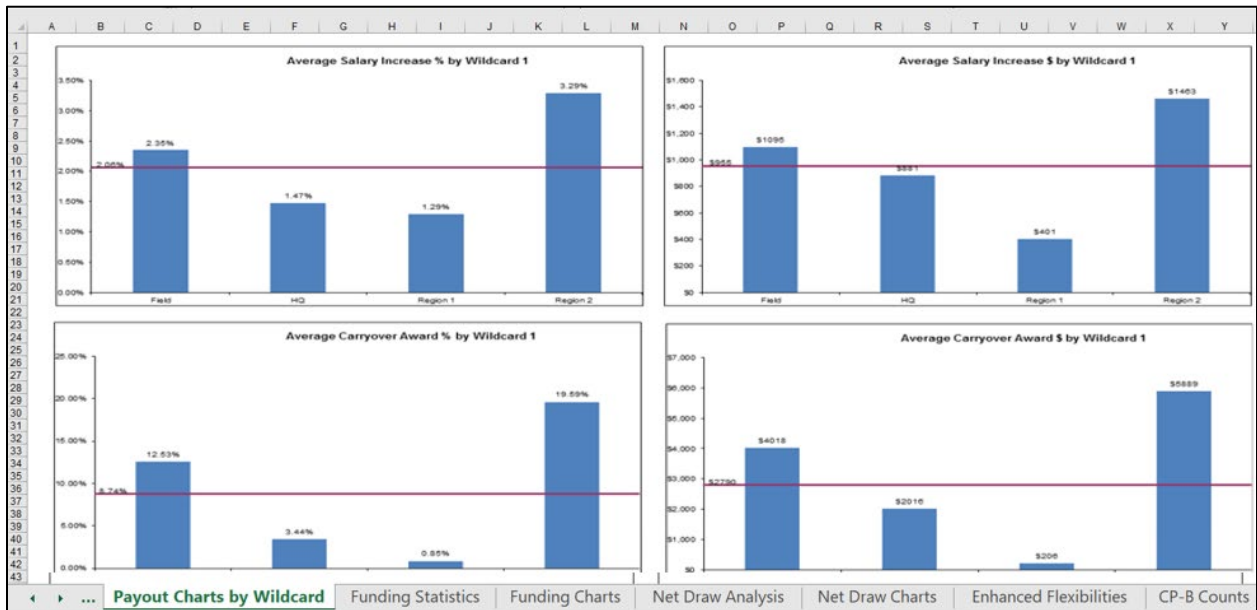
Funding Statistics Worksheet

The **Funding Statistics** worksheet provides statistics on funding amounts budgeted and allocated through the pay pool process. The budget is represented in the Inputs section and the allocations are represented in the Outputs section. Data is provided across pay pools and by individual pay pool. There are several new lines in this tab to provide information regarding the rolling over of CRI remaining dollars to the CA Funding Pot.

Number of employees and total salaries (basic and adjusted) are presented at the top of the sheet. Flags indicating usage of the new proration or time off capabilities are present as well. Inputs include the dollar amount and percent budgeted for salary increases and awards. Outputs include the approved salary increases/awards totals and the difference between the budgeted amount and the amount allocated. This section also provides the percent of total basic salary spent on salary increases and carryover and the percent of adjusted salary spent on awards.

Funding Statistics

		Overall	1234	9009
	Total Employees	57	27	30
	- Retained Employees	9	5	4
	- Presumptive SPL	3	1	2
	Sum of Basic Salary (cap to band max)	$4,660,769	$2,037,054	$2,623,715
	Sum of Adjusted Basic Salary (cap EXI	$5,492,827	$2,417,534	$3,075,293
	First AcqDemo Cycle	0	1	0
	Rollover CRI remainder to CA	1	Yes	No
	Use OCS based Control Points	2	Yes	Yes
	OCS Control Point Target		SPL	SPL
	Proration Plan		n/a	n/a
	Time Off Plan		Discretion	non-CCAS
Inputs				
	Salary Increase (CRI)	2.321%	2.400%	2.260%
	CRI Set-aside (% of total)	5.010%	11.571%	0.000%
% Budgeted	Award (CA)	1.000%	1.000%	1.000%
	CA Funds from CRI Carryover	0.103%	0.234%	0.000%
	Award Spending % in CCAS	0.900%	0.900%	0.900%
	Award Set-aside		3.646%	21.678%
	Salary Increase (CRI)	$112,908	$48,889	$64,019
	CRI Set-aside	$5,657	$5,657	$0
$ Budgeted	Award (CA)	$54,927	$24,175	$30,752
	$ Award Spending in CCAS	$49,436	$21,758	$27,678
	Award Set-aside	$7,000	$1,000	$6,000
	Beta 1 (CRI Target)		0.	0.
	Beta 2 (CA Target)		1.	1.
Outputs				
	Alpha 1	0.7165	0.6681	0.7601
	Alpha 2	0.0991	0.1153	0.0846
	Approved CRI	$82,890	$36,918	$45,972
CRI	CRI Carryover Awards	$24,336	$6,302	$18,034
	Spent CRI	$107,226	$43,220	$64,006
	CRI Remainder (rolls to CA if Yes on rc	$5,682	$5,669	$13
	CA Awards	$46,706	$25,892	$20,814
CA	Total Awards	$71,042	$32,194	$38,848
	Remainder Award	$7,538	$1,535	$6,003
	Non-CCAS CA Spending	$12,355	$2,417	$9,938
	% of Basic Salary spent on Salary Incre	1.78%	1.81%	1.75%
CRI	% of Basic Salary spent on Carryover	0.52%	0.31%	0.69%
	% of Basic Salary unspent	0.12%	0.28%	0.00%
	% of Adj Basic Salary Spent in CMS	0.85%	1.07%	0.68%
CA	% of Adj Basic Salary unspent rollover	0.14%	0.06%	0.20%
	% of Adj Basic Salary for outside CMS	0.22%	0.10%	0.32%

Funding Charts Worksheet

The **Funding Charts** worksheet displays bar charts of the statistics (%) provided by the **Funding Statistics** worksheet. A trend line shows the average across pay pools. This worksheet contains the following charts by pay pool:

- Salary Increase (CRI) Funding
- CRI Expenditure – carryover amount identified
- Award (CA) Funding
- Award Expenditure
- Alpha 1 (CRI)
- Alpha 2 (CA)
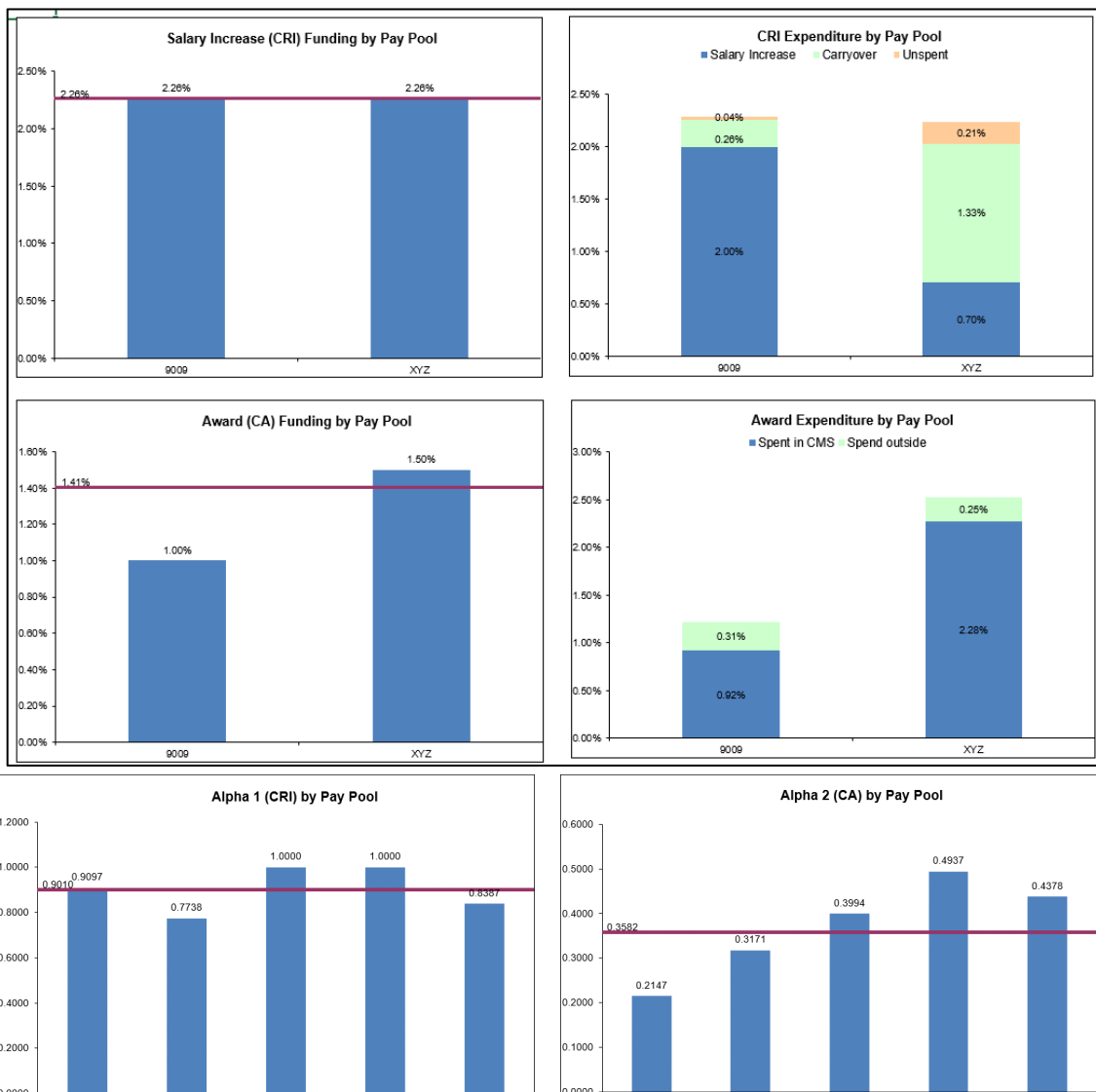
Net Draw Analysis Worksheet

The Net Draw Analysis worksheet provides a summary of net draw statistics by career path/band, career path, broadband, Wildcard, and the entire population. This analysis considers the difference between the amount of an employee's payout and the dollar amount that was contributed to the pay pool fund based on the employee's basic salary, adjusted salary, and the funding levels. The formula is as follows:

$$\text{Net Draw \%} = (\text{Received} - \text{Contributed}) / \text{Basic Pay}$$

If an employee receives a payout greater than the dollar amount that was contributed to the pay pool fund as a percent of their basic salary, then the net draw is a positive percent. The net draw percent is a negative if the employee receives a lesser amount in a payout than what was contributed to the pay pool fund as a percent of their basic salary.

Example
An employee earns $60,000 as a basic salary with $5,000 locality pay. The pay pool funds CRI at 2% and CA at 1.5%. The employee therefore contributed $2,175 (60,000*0.02+65,000*0.015). The employee received a $2,500 (CRI increase plus carryover plus award) payout resulting in a positive net draw – she received a greater payout than what she contributed to the pay pool fund. Had the employee received a $1,000 payout, her net draw would be a negative.

		Number of Employees Analyzed	Received	Contributed	Basic Pay	Net Draw %
Net Draw Analysis						
Net Draw is a measure used to compare the payouts between groups of employees.						
Net Draw % = (Received – Contributed) / Basic Pay*						
*Basic Pay is limited to band max for retained pay employees						
Analyzed Population excludes presumptives due to time						
Entire Population:		16	$ 59,966	$ 67,825	$ 1,524,742	-0.52%
Career Path						
NH		13	$ 52,909	$ 59,432	$ 1,335,436	-0.49%
NJ		2	$ 3,634	$ 6,351	$ 143,222	-1.90%
NK		1	$ 3,423	$ 2,043	$ 46,084	2.99%
Band						
2		2	$ 4,966	$ 3,813	$ 85,997	1.34%
3		10	$ 31,525	$ 41,962	$ 941,449	-1.11%
4		4	$ 23,475	$ 22,050	$ 497,296	0.29%
Career Path/Band						
NH-3		9	$ 29,434	$ 37,381	$ 838,140	-0.95%
NH-4		4	$ 23,475	$ 22,050	$ 497,296	0.29%
NJ-2		1	$ 1,543	$ 1,770	$ 39,913	-0.57%
NJ-3		1	$ 2,091	$ 4,581	$ 103,309	-2.41%
NK-2		1	$ 3,423	$ 2,043	$ 46,084	2.99%
Office Symbol						
Div 1		4	$ 14,603	$ 16,205	$ 365,474	-0.44%

☐ Only visible rows from Data tab

Net Draw Charts Worksheet

The **Net Draw Charts** worksheet displays bar charts of the statistics (%) provided by the **Net Draw Analysis** worksheet. This worksheet contains the following charts:

- Net Draw by Career Path/Band
- Net Draw by Career Path
- Net Draw by Band
- Net Draw by Wildcard

The bars above the axis are groups that have contributed less than they received in payouts. Groups with bars below the axis contributed more than they received in payouts.
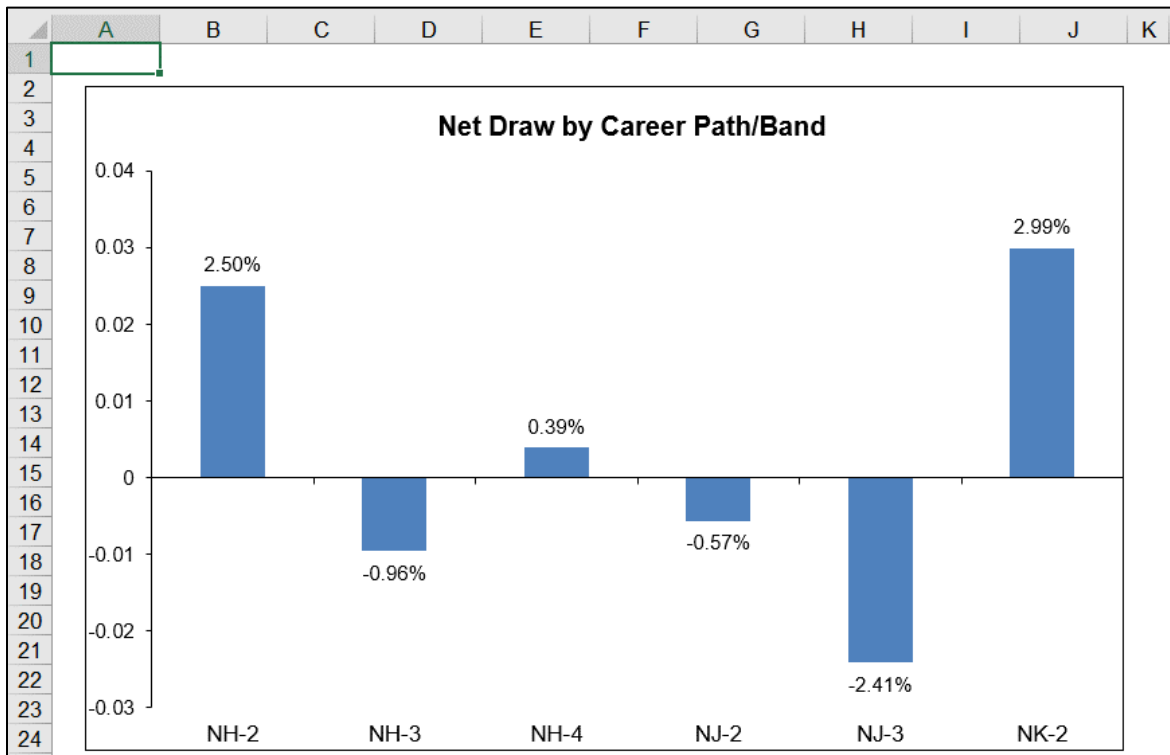
Enhanced Flexibilities

A number of new flexibilities were added during the 2020 and 2021 cycle to allow pay pools more options in the distribution of CA Funds and the split of CRI money.   This worksheet informs the user as to the extent of usage for these new flexibilities.

☐ Only visible Data tab rows

Enhanced Flexibilities

	Number of Employees	Time-Off Awards				Proration		Salary Split	
		No. Receiving Time-Off	% Receiving Time-Off	Total Time-Off Hours	Average Time-Off Hours*	Number Prorated	Average Pct Proration*	Number Split	Average Split*
Entire Population:	16	3	18.8%	78	26.0	1	99.8%	1	25.0%
Pay Pool									
4001	16	3	18.8%	78	26.0	1	99.8%	1	25.0%
Career Path									
NH	13	3	23.1%	78	26.0	1	99.8%	0	
NJ	2	0	0.0%	0		0		1	25.0%
NK	1	0	0.0%	0		0		0	
Band									
2	2	0	0.0%	0		0		1	25.0%
3	10	2	20.0%	44	22.0	1	99.8%	0	
4	4	1	25.0%	34	34.0	0		0	
Career Path/Band									
NH-3	9	2	22.2%	44	22.0	1	99.8%	0	
NH-4	4	1	25.0%	34	34.0	0		0	
NJ-2	1	0	0.0%	0		0		1	25.0%
NJ-3	1	0	0.0%	0		0		0	
NK-2	1	0	0.0%	0		0		0	

CP-B Counts Worksheet

The **CP-B Counts** worksheet displays counts by career path and broadband combinations overall and by pay pool.

	Overall	ABC	XYZ
Counts by Career Path and Broadband			
Number of Employees	100	50	50
Count of Employees by Career Path and Band			
NH-1	0	0	0
NH-2	20	10	10
NH-3	40	20	20
NH-4	12	6	6
NH Total	72	36	36
NJ-1	4	2	2
NJ-2	0	0	0
NJ-3	4	2	2
NJ-4	6	3	3
NJ Total	14	7	7
NK-1	2	1	1
NK-2	10	5	5
NK-3	2	1	1
NK Total	14	7	7

Tabs: ... | Funding Statistics | Funding Charts | Net Draw Analysis | Net Draw Charts | Enhanced Flexibilities | **CP-B Counts** | Salary | RailReport

Salary Worksheet

The **Salary** worksheet provides the average salary by career path and broadband for the entire population and for each pay pool.

Average Base Salary by Career Path and Broadband

Retained Rate Employee Base Salary includes locality pay

	Overall	11	XYZ
Number of Employees	79	15	64
Average Base Salary for New Pay Year			
NH-1			
NH-2	$53,976	$44,723	$72,482
NH-3	$87,397	$93,608	$86,126
NH-4	$116,616	$128,508	$113,818
NH Total	**$94,063**	**$96,397**	**$93,499**
NJ-1			
NJ-2			
NJ-3			
NJ-4			
NJ Total			
NK-1			
NK-2	$49,523		$49,523
NK-3			
NK Total	**$49,523**		**$49,523**
Average Base Salary for Current Pay Year			
NH-1			
NH-2	$52,587	$42,999	$71,764
NH-3	$85,880	$91,696	$84,690
NH-4	$114,219	$124,175	$111,876
NH Total	**$92,311**	**$93,864**	**$91,936**
NJ-1			
NJ-2			
NJ-3			
NJ-4			
NJ Total			
NK-1			
NK-2	$48,488		$48,488
NK-3			
NK Total	**$48,488**		**$48,488**
Percent Change in Average Base Salary			
NH-1			
NH-2	2.6%	4.0%	1.0%
NH-3	1.8%	2.1%	1.7%
NH-4	2.1%	3.5%	1.7%
NH Total	**1.9%**	**2.7%**	**1.7%**
NJ-1			
NJ-2			
NJ-3			
NJ-4			
NJ Total			
NK-1			
NK-2	2.1%		2.1%
NK-3			
NK Total	**2.1%**		**2.1%**

Rail Report Worksheet

The Rail Report Worksheet displays a report of rail zones and an OCS chart that is used for the Aggregate Report generated from the Add-Ins menu bar.
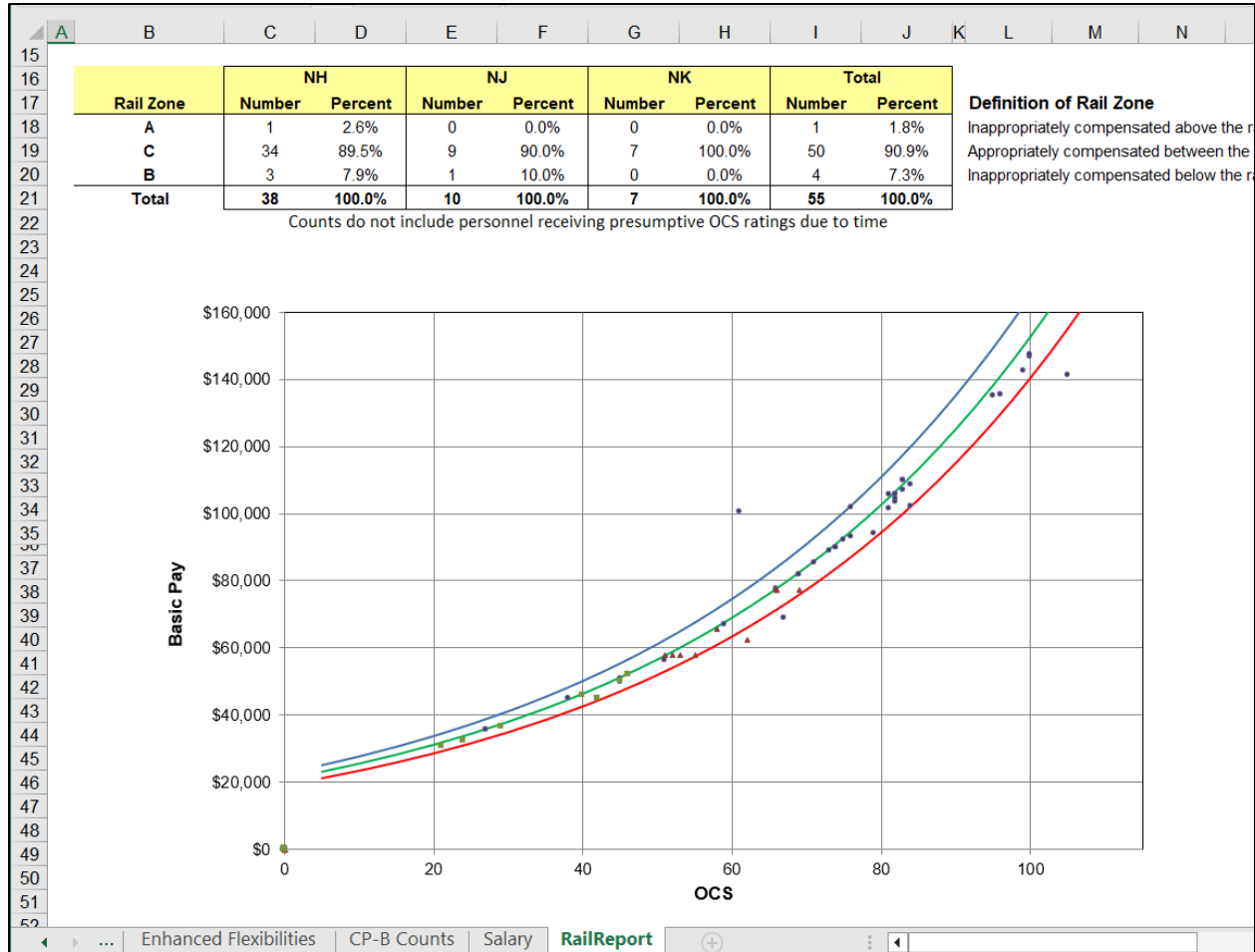
You may take a glance at the OCS chart and rail zone distribution on this worksheet for your information, but it is recommended that you use the Generate Aggregate Report function in the Add-Ins menu bar to create the summary charts to present aggregate data. Retained employees are plotted at their pay band maximum salary.

New in 2023, the RailReport tab includes a table and a pie chart showing the distribution of the Performance Rating of Record across career paths and overall. This information will be found in the Aggregate Report discussed in the next section.

Q	R	S	T	U	V	W	X	Y	Z	AA

Performance Rating of Record

Rating of Record	NH		NJ		NK		Total	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Unacceptable (Level 1)	2	5.3%	0	0.0%	0	0.0%	2	3.6%
Fully Successful (Level 3)	30	78.9%	10	100.0%	6	85.7%	46	83.6%
Outstanding (Level 5)	6	15.8%	0	0.0%	1	14.3%	7	12.7%
Total	38	100.0%	10	100.0%	7	100.0%	55	100.0%
Modal	3		3		3		3	

Counts do not include personnel receiving presumptive OCS ratings due to time

Performance Rating of Record

3.6%
12.7%
83.6%

■ Unaccepttable (Level 1) ■ Fully Successful (Level 3) ■ Outstanding (Level 5)

37
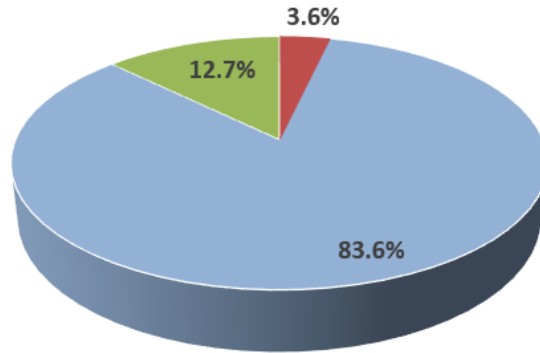
Sharing Information

Generating an Aggregate Report

The Generate Aggregate Report button in the Add-Ins menu bar creates a report that displays aggregate data for rail zones, OCS, delta OCS, salary increases and awards. When you select this button, a PowerPoint file opens, and you receive a prompt to name and save the file. The charts are imported into PowerPoint as pictures.

Rails Report

Rail Zone	NH		NJ		NK		Total		Definition of Rail Zone
	Number	Percent	Number	Percent	Number	Percent	Number	Percent	
A	1	2.6%	0	0.0%	0	0.0%	1	1.8%	Inappropriately compensated above the rails
C	34	89.5%	9	90.0%	7	100.0%	50	90.9%	Appropriately compensated between the rails
B	3	7.9%	1	10.0%	0	0.0%	4	7.3%	Inappropriately compensated below the rails
Total	38	100.0%	10	100.0%	7	100.0%	55	100.0%	

Counts do not include personnel receiving presumptive OCS ratings due to time

---

Performance Rating of Record

Rating of Record	NH		NJ		NK		Total	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Unacceptable (Level 1)	2	5.3%	0	0.0%	0	0.0%	2	3.6%
Fully Successful (Level 3)	30	78.9%	10	100.0%	6	85.7%	46	83.6%
Outstanding (Level 5)	6	15.8%	0	0.0%	1	14.3%	7	12.7%
Total	38	100.0%	10	100.0%	7	100.0%	55	100.0%
Modal	3		3		3		3	

Performance Rating of Record
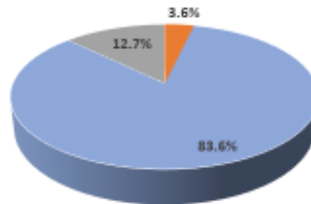
Unacceptable (Level 1) — Fully Successful (Level 3) — Outstanding (Level 5)

Copying and Pasting into PowerPoint and Excel
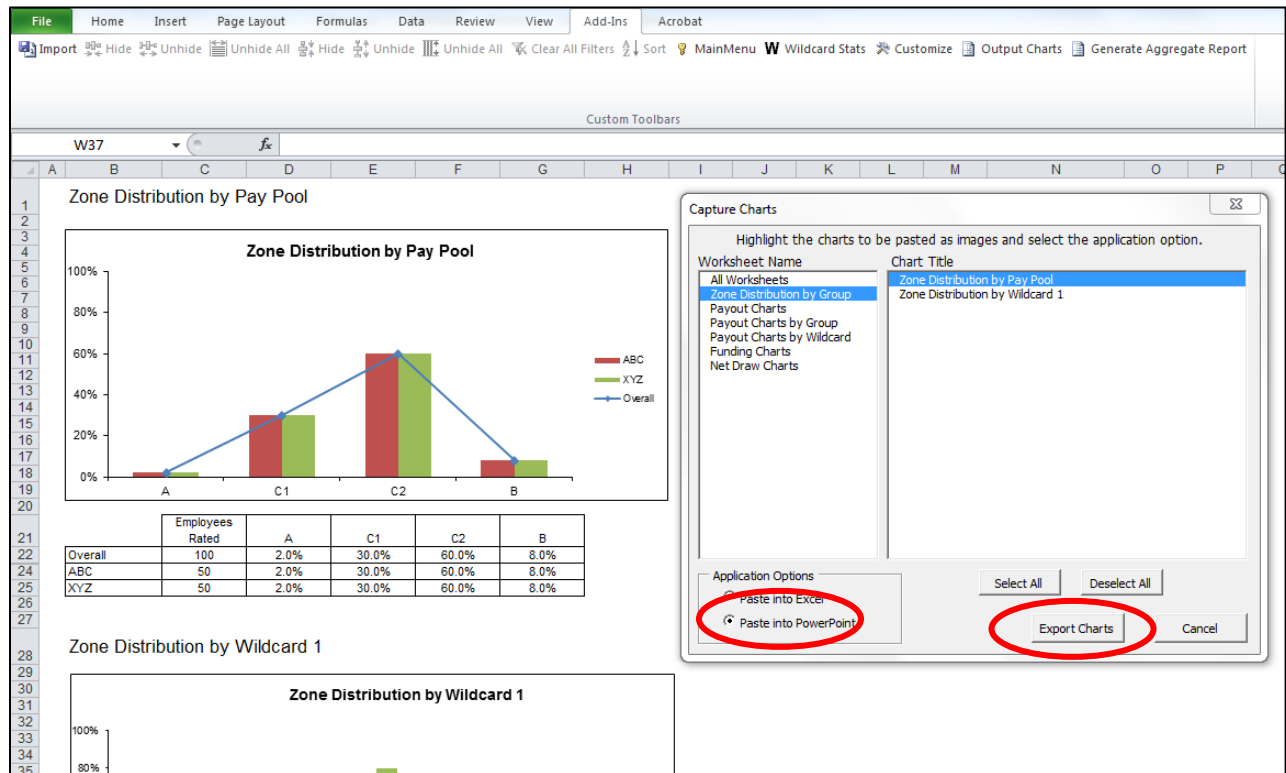
You can output charts directly from the PAT into PowerPoint presentations and into Excel. There is an Output Charts function in the Add-Ins menu bar. Using this function ensures charts placed into the applications are minus the underlying data.
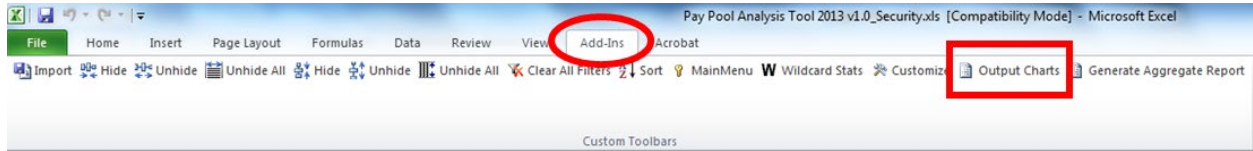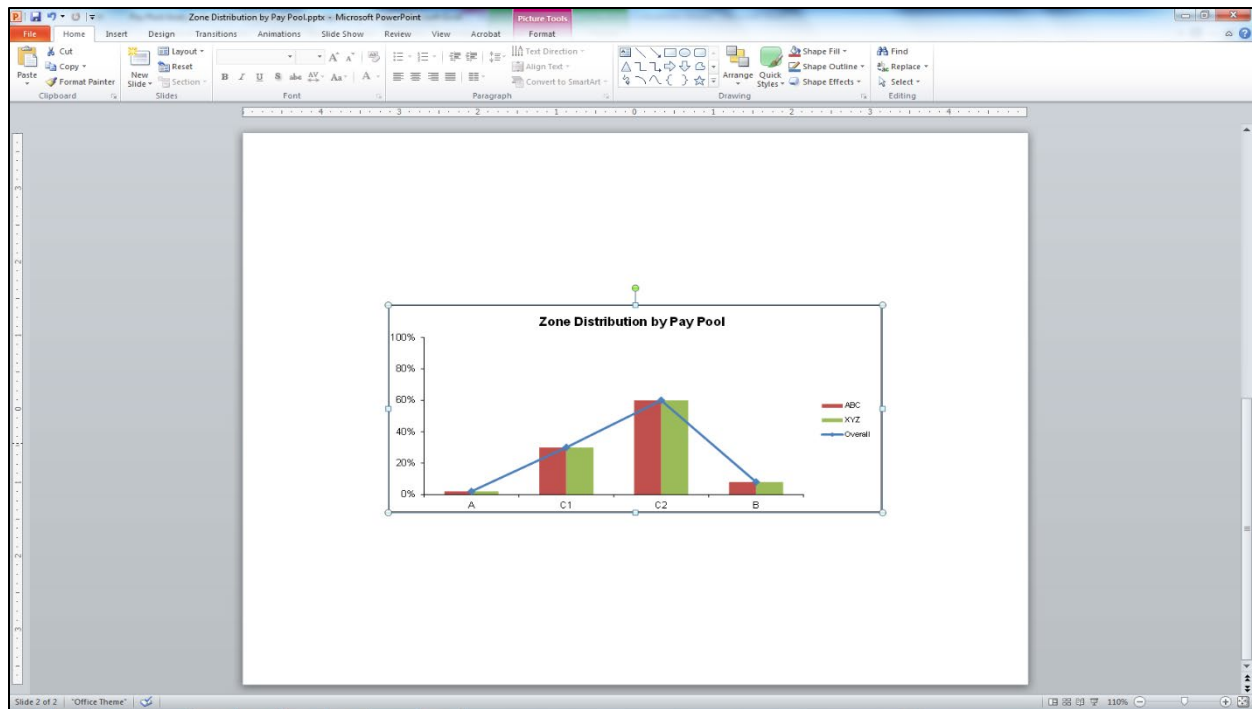

Copying Charts into PowerPoint

To copy charts from the PAT into PowerPoint:
1. Click on the "Output Charts" button in the Add-Ins menu bar. This opens a selection window listing the available worksheets and charts.
2. Select the worksheet and the specific chart(s) you want to capture.
3. Under Applications Options, select the radio button for "Paste into PowerPoint."
4. Select the "Export Charts" button. This opens a new PowerPoint file with your selected charts and a prompt to name and save the file. Charts are imported into PowerPoint as pictures.

Copying Charts into Excel

To copy charts from the PAT into Excel:

1. Click on the "Output Charts" button in the Add-Ins menu bar. This opens a selection window listing the available worksheets and charts.
2. Select the worksheet and the specific chart(s) you want to capture.
3. Under Applications Options, select the radio button for "Paste into Excel."
4. Select the "Export Charts" button. This opens an Excel file with your selected charts and a prompt to name and save the file. Charts are imported into Excel as pictures.

Copying Data from Worksheets

You can copy and paste data from the PAT to another Excel file to conduct additional analysis or to create additional views.

To copy selected data to a new spreadsheet:
1. Select the cells you want to copy.
2. Select "Copy" from the Home menu bar or right click and select "Copy."
3. Open the spreadsheet you want to copy the data into.
4. Select "Paste Special" from the Home menu bar or right click and select "Paste Special."
5. Select the "Values" radio button under Paste in the Paste Special window and click "OK." The data will be pasted as it exists in the PAT worksheet including any hidden columns.
6. As an extra step to allow the data to look more presentable in the new location, immediately select "Paste Special" again and select "Formats."
7.