The slide features a blue header with the 'iCi' logo on the left and 'Acq Demo' on the right. The main content is centered and includes the title 'AcqDemo Training', a detailed subtitle about spreadsheets and analysis tools, the date 'FALL 2018', the organization 'DOD', and the project name 'Civilian Acquisition Workforce Personnel Demonstration Project (AcqDemo)'. A URL and a speaker icon are located at the bottom.

iCi **Acq Demo**

AcqDemo Training

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

FALL 2018

DOD

Civilian Acquisition Workforce Personnel Demonstration Project (AcqDemo)

<http://acqdemo.hci.mil>

Welcome to the Fall 2018 AcqDemo Spreadsheet training.

This training describes how to use the SubPanel Spreadsheet, the Compensation Management Spreadsheet (or CMS) and the Pay Pool Analysis Tool (or PAT) in support of the AcqDemo appraisal process.

This training has been refreshed for Fiscal Year 2018.



Course Objectives

At the completion of this course, participants will be able to:

- Understand FRN Changes
- Summarize the main functionalities of tools
- the Sub-Panel, Compensation Management (CMS), and the Pay Pool Analysis Tool (PAT) tools
- Understand the structure of the Sub-Panel, CMS, and PAT
- Understand the overall role of a Pay Pool Administrator
- Know when and how to make a “Round Trip” between Sub-Panel Spreadsheet or CMS and CAS2Net
- Understand how to use the Sub-Panel and CMS tool when supporting a sub pay pool or a pay pool
- Understand how to pull data into the PAT and how to use it to review rating and payout results



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As you complete this course, you will understand how the latest Federal Register changes have affected the spreadsheets.

Besides changes from last year’s spreadsheets, we’ll review some of their main functionalities and understand how they are structured – we’ll go over each tab and describe their individual functions.

We’ll also go over the role of the pay pool administrator and learn the concept of a round trip, which refers to the relationship between the spreadsheets and the online tool.

Most of you will be using the spreadsheets to support a subpanel or pay pool panel meeting. We’ll describe how they should be used during these meetings.

Finally we’ll go over the PAT and the many statistical reports it can generate for one or several pay pools.

hici Federal Register Notice (FRN) Changes **Acq Demo**

- Very High Scores
- Performance Appraisal Quality Levels (PAQL)
- Temporary Promotion Calculation

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Besides reducing the number of factors from 6 to 3, FRN changes introduce additional values for Very High Scores, Performance Appraisal Quality Levels and revised handling of Temporary Promotions.

These changes are implemented in the spreadsheets.

Performance Appraisal Quality Levels (PAQL)

In order to comply with 10 U.S.C. 1597(f), the CCAS has been modified to embrace the quality of performance an employee demonstrates in achieving his/her expected contribution results through an assessment of performance under each of the three contribution factors

PAQL values are available as drop down options in the new PAQL section of the CMS

During the pay pool meeting, a preliminary performance appraisal level (1, 3, or 5) will be assigned by the rating official to each of the three contribution factors. The three performance appraisal levels are averaged to calculate the annual rating of record. The result will be rounded to the nearest tenth of a decimal point

PAQL available values are:
 Level 1 - Unacceptable
 Level 3 - Fully Successful
 Level 5 - Outstanding

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The latest Federal Register introduces the concept of quality of performance into AcqDemo.

For each of the 3 factors, organizations select a Performance Appraisal Quality Level (also known as PAQL and pronounced Pay Quill) after assessing employees' performance in achieving their expected contribution results.

The available values are Level 1 – Unacceptable; Level 3– Fully Successful and Level 5 – Outstanding.

These values are available as drop down options in the CMS and SubPanel Spreadsheets and will be averaged to calculate the employee's annual rating of record.

Acq Demo

Temporary Promotion

A ratable temporary promotion is one that starts on or before 3 July 2018 and ends after 6 Jan 2019. All others are non-ratable so the employee is rated in their permanent position. An employee on a ratable temporary promotion needs to be moved to the pay pool of the temporary promotion. All others stay in the pay pool of their permanent position.

Presumptive Status ?	Retained Pay?	Career Path	Broadband Level	Occ Series	CY2018 Base Pay	Ratable Temp Promotion	Locality Code	Locality Rate
0	0	NH	3	1550	\$78,200		WA	28.22%
0	0	NH	3	0893	\$92,558		WA	28.22%
0	0	NH	3	0505	\$84,246		WA	28.22%
0	0	NH	2	0361	\$63,614		WA	28.22%
0	0	NJ	3	0340	\$67,098	Yes	LA	30.57%
0	1	NJ	4	0802	\$128,700		LA	30.57%

While on a ratable temporary promotion, any basic pay adjustments to reflect a CCAS rating for contributions and General Pay increases occurring while on that temporary promotion will be applied to the temporary promotion basic pay and not the basic pay of the permanent position of record

The Temp Promotion flag gets downloaded with the import file from CAS2Net and shows up as a "Yes" or "No" in Col O of the CMS

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The latest Federal Register changes introduce a new concept on handling temporary promotion salary adjustments, where such adjustments to salaries while on a ratable temporary promotion assignment will be applied to the temporary salary not the employee's permanent position salary.

As a Pay Pool Administrator, use CAS2Net to setup the Temporary Promotion status for an employee. Once that setup is made in CAS2Net, the import file into the CMS and the Subpanel, will have a "Yes" or "No" flag indicator., where yes is used only for ratable temporary promotions.

In the CMS, the Temporary Promotion flag gets downloaded to Col O

In the SubPanel Spreadsheet, the Temporary Promotion flag gets downloaded to Col P.

Employees on ratable temporary promotions should be in the CMS of the pay pool for their temporary promotion. All others should be in the CMS for the pay pool of their permanent position.

The image shows a presentation slide with a blue header and footer. In the top left corner is the 'hci' logo. In the top right corner, there is a logo for 'Acq Demo' consisting of a grid of colored squares. The main title of the slide is 'Role of the Pay Pool Administrator' centered in a bold, dark blue font. At the bottom left of the slide, the URL 'http://acqdemo.hci.mil' is displayed. At the bottom right, there is a small speaker icon and the number '7'.

Let's discuss the role of the Pay Pool Administrator



Role of the Pay Pool Administrator

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



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The Pay Pool Administrator or PPA is responsible for the accuracy of the personnel data in CAS2Net.

A few recommendations:

- Stay abreast of all pay pool advisories sent by the PMO, which share information about any system bugs, software updates, and other emerging issues that may impact your pay pool activities.
- Check the status of your organization's progress using CAS2Net status reports. Become familiar with your organizations' CCAS timeline to ensure all meetings happen on a timely basis and that you are prepared to support those meetings.
- Learn how to use the software (both CAS2Net and Spreadsheets) and be ready to produce reports that will support the decision making of your pay pool and sub pay pool panel members
- Go to Pay Pool Notices in CAS2Net to find your bi-weekly Discrepancy Report
Posted on or about the Friday after the start of each pay period
Verify any discrepancies noted by correcting CAS2Net data or confer with personnel



Role of the Pay Pool Administrator (continued)

- React to pay pool managers as they decide if first-level supervisors are going to recommend just category factor scores (i.e., 3M, 4L) or category and integer factor scores
 - Communicate with pay pool managers to become aware of decision
 - Use that knowledge when reviewing data downloaded to spreadsheets
- Remind pay pool managers that determining factor scores is a multi-step process
 - Employees describe their contributions on each factor
 - First level supervisors edit and expand on the descriptions
 - First level supervisors determine the contribution level (1-4) for each factor by comparing the contribution description to the standard AcqDemo descriptors and discriminators
 - First level supervisors recommend a category (H, M, L) within the level (and perhaps a specific integer score) for each factor

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Ask to see your organizations business rules then become familiar with them.

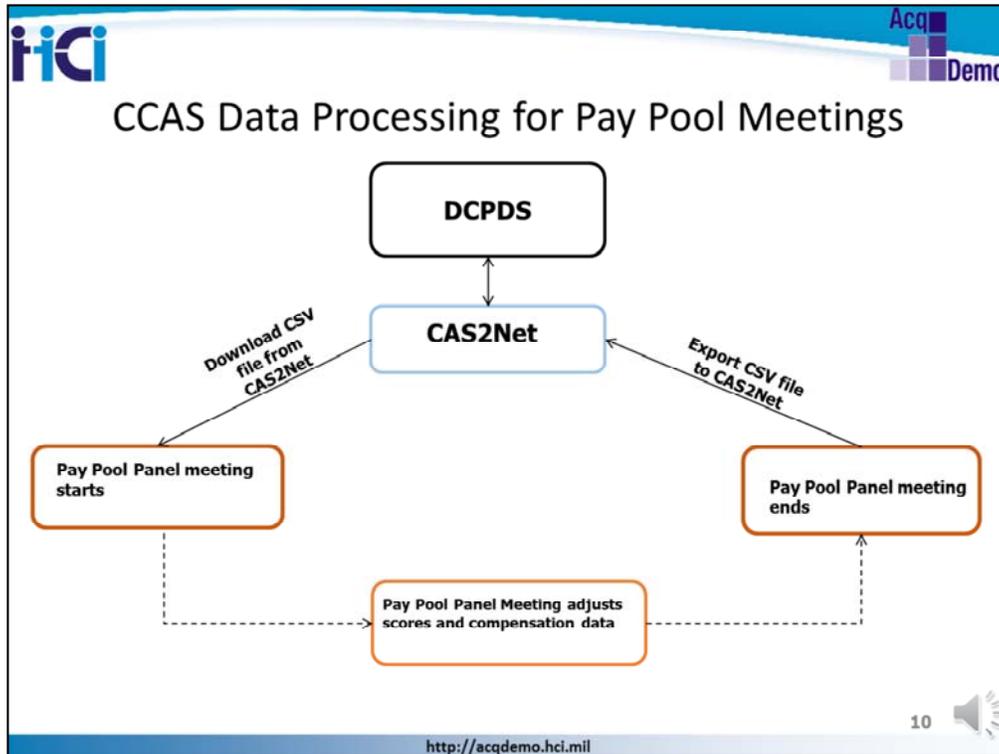
For example, while most first level supervisors are limited to assigning categorical scores, some organizations encourage supervisors to assign integer scores as well. As a PPA, you need to know what is the business rule for your organization.

The result of the sub-panel meeting is that every employee should have integer factor scores for all three factors.

Support your panel members during the meetings:

For example, start with one employee's record and review it carefully. Review and discuss the employee's self-appraisal and the supervisor's appraisal.

Refer to the descriptors and discriminators to help panel members reach a decision on a factor score. Support the discussion and capture the decisions into the CMS or the Sub Panel spreadsheet



CAS2Net gets some of its data from DCPDS, such as names, salaries, position. The PPA adds and/or corrects information such as adding the supervisory structure and pay pool information.

Use CAS2Net to download and upload data adjustments without compromising changes made during the pay pool

Use CCAS Software functionality to import and export the CSV file of data



Concept of a Round Trip

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

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A round trip happens when data gets downloaded and uploaded between the Spreadsheets and CAS2Net. The Spreadsheets are sometimes called the offline tools, because they allow organizations to capture and store decisions from pay pools without having to login to CAS2Net, the online tool.

When the data entered into a spreadsheet during a pay pool meeting is uploaded into CAS2Net using the export file, it writes over what was in CAS2Net with the new pay pool decisions.

Data can also be downloaded from CAS2Net into the Spreadsheets using the import file



Round Trip Applications

- If a software issue is discovered during the pay pools, you will receive a new spreadsheet in Pay Pool Notices
 - If currently using a spreadsheet:
 - Export and upload your data to CAS2Net
 - Download the new Spreadsheet from Pay Pool Notices
 - Open the new Spreadsheet
 - Download and import your data into it from CAS2Net and continue working
 - This process will save the work you have already done in the Sub-Panel or CMS tools
 - If data was already uploaded, perform the same steps starting with download the new Spreadsheet
- The Round Trip process will be demonstrated later in this training

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Sometimes, a new version of a spreadsheet is published because it needs a software fix.

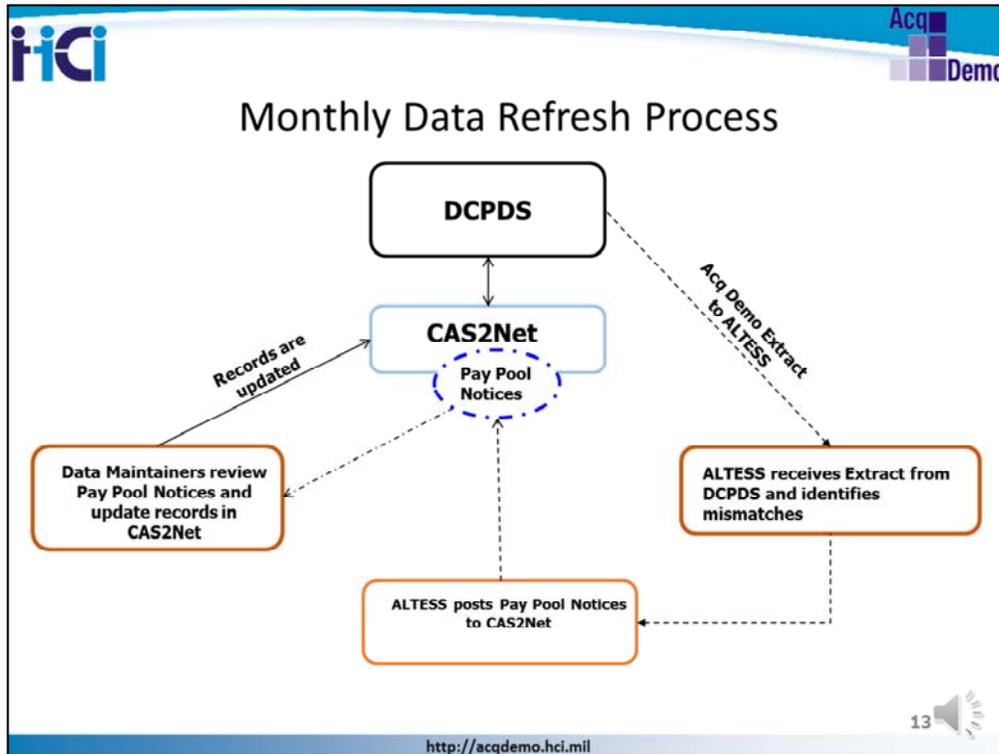
The new spreadsheet is made available for download from CAS2Net Pay Pool Notices.

One application of a round trip is that the PPA can safely replace the existing spreadsheet with the new one and keep any data already stored in the existing spreadsheet:

First, the PPA exports the data from the spreadsheet for upload to CAS2Net using the Export function

After downloading the new spreadsheet, the PPA simply downloads and imports the stored data from CAS2Net into the new, fixed spreadsheet, without having to re-enter any data.

Always remember that the data must be uploaded to CAS2Net to start the process



To ensure CAS2Net data records are up to date, Pay Pool Administrators access the CAS2Net Pay Pool Notices module to download and review discrepancy reports that identify mismatches between what is in CAS2Net and what is in DCPDS

PPAs update the CAS2Net records if the discrepancy is confirmed.

It is important for PPAs to access Pay Pool Notices and review these discrepancy reports. Otherwise, the pay pool work will need to be redone when the data is finally corrected.

Round Trip Applications (Continued)

- If an error is discovered during a pay pool regarding a salary for example, you cannot change the salary in the spreadsheet
 - Export and upload to CAS2Net to keep any recent changes you made
 - Make the salary change in CAS2Net
 - Download and import to Spreadsheet
 - Continue your pay pool work
 - Note: don't keep working offline when updating data

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Keeping the records up to date gets done in CAS2Net. Remember that only some of the data fields that can be edited in the spreadsheets, including scores, control point decisions and discretionary awards.

All other fields such as salaries, names, locality, etc must be corrected in CAS2Net using the Data Maintenance module.

If you discover a salary error during a pay pool, for example, do a round trip: export and upload your existing data into CAS2Net, correct the record in CAS2Net Data Maintenance, download and import back into the Spreadsheet.

Acq Demo

Concept of a “Wildcard”

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

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In the spreadsheet, cells are protected (that’s why you need to do a round trip to correct that data in CAS2Net) but some cells are editable. You can tell you can edit a cell if it is yellow. White cells are protected while grey cells are not applicable.

The Spreadsheets have a number of “wildcard” columns that can be used to record data, provide information, store formulas and other entries that would be helpful to support a pay pool. For example, you can use wildcard to establish categories within your pay pool (such as “HQ” and “Field”) simply by filling out the wildcard cell for each record. Note that you can then create your own statistical categories based on the ones you have defined for your organization.

Note that formulas won’t be kept through a round trip unless you enter that formula in the yellow cell at the bottom of your list of records, below the wide gray line after the last person’s record

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

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Let's discuss how to prepare for a sub panel or pay pool panel session

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Downloading Steps

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

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Preparing for a panel meeting starts in CAS2Net.

Login to CAS2Net as a PPA, and select “Offline Interface” from your PPA menu

This is when you must download records stored in CAS2Net. The way to do that is to use the “Download Employee Data” button which will generate an import file for your CMS or Sub Panel spreadsheet.

Make sure to select the correct pay pool from the picklist and choose the file you need

Offline Interface

Offline Interface Menu

Pay Pool: AMC/LH

Download: [Download Employee Data](#)
Last completed download: None

Upload: [Upload Employee Data](#)
Last completed upload: None

Offline Interface - Download Employee Data

Download Instructions

NOTE: Files are dynamically generated and the server may take several minutes before download starts. Please be patient and do not repeatedly request a download file which will cause the server to slow down further and may generate duplicate appraisal records. To save a linked file to your computer, use a right mouse button click on the link and choose "Save Target As..." Sub-Panel Meeting choices without hot links for the files have been locked. Contact your pay pool administrator if you need to unlock a meeting.

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

[Return to Offline Interface Main Menu]

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From the OFFLINE INTERFACE, select the pay pool for which you are preparing your spreadsheet

Click DOWNLOAD button

CAS2net displays the files that are available for download

Click on the selected file to download




Naming Convention

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

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To ensure you select the correct file, CAS2Net uses a naming convention that helps identify whether the file is a CMS import file or Sub Pay Pool import file.

An "Import file" downloads data from CAS2Net to CMS or Sub Panel

An "Export file" uploads data from CMS or Sub Panel spreadsheet back to CAS2Net, which is considered to be the "Master"

Both Import and Export files are text files, which means their extension is "CSV"

When you download from CAS2Net to the CMS, look for the one that shows the pay pool name followed by "to_CMS".

When you download from CAS2Net to the SubPanel spreadsheet, look for the one that shows the pay pool name followed by "to_SubPanel"; for SubPanel import files, the name of the Sub Pay Pool manager is added to the file name.

When you are ready to upload your meeting data back to CAS2Net, use the "Export" button on either the SubPanel or CMS and generate an export file.

The Export filename from CMS shows the pay pool name followed by "to_Master" and the extension .csv

The Export filename from a Sub Panel spreadsheet shows the pay pool name followed by "to_Master", the name of the Sub Panel Manager and the extension "CSV"

Macro Enabled Warning

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

SECURITY WARNING: Some active content has been disabled. Click for more details. [Enable Content](#)

Compensation Management Spreadsheet

Cycle: 2018 Version: dev 29

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

Macros have not been enabled for the CMS.

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

[Data/p spreadsheet Downloads](#) – Download the data file from the CAS/Net, then click on import to load the file into this spreadsheet.

Appraisal Score Entry – Once final scores for each factor, and

Score Normalization – Compare scores differences. Run predefine parameters and assign pay outs

Data Maintenance – All addition the central database. All columns locked. To preserve your work, upload to CAS/Net before change

Final "Q" Setting – This spread you have been notified that "Q" final "Q" value and related payroll data.

Final Compensation Setting – the pay adjustments and awards

Data Upload – Use Export to or pay pool to CAS/Net.

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.

Scatter-plots of OCS Score by Salary
[Current Pay & 2018 SPL](#) [New Pay & 2019 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](#)

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After you download the latest version of the CMS from CASNet, save it in a folder on your computer or laptop.

Download the Import file from CAS2Net and save it in the same folder where you saved your CMS file. This is very important: the CMS import function will not work if the files are not in the same folder.

The CMS and SubPanel run multiple macros in the background to process the data and perform calculations. These macros need to be enabled in order for your CMS or Subpanel spreadsheet to work properly. Click on the “Enable Content” button to initiate the spreadsheet macros.

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Importing the CSV file

Compensation Management Spreadsheet

Cycle: 2018 Version: dev 23

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

Data Maintenance – All additions, deletions, and modifications must be done in the central database. All columns except for data entry and “wild-card” are locked. To preserve your work, export the data from this spreadsheet and upload to 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 payroll data.

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

Data Upload – Use Export to create a file for uploading the results from your pay pool to 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: Last Export: Last Modified: Use Today

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

Parameters

[Set CRI and CA Parameters](#)

Summary Reports

[Ralls Report](#)

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

[Summary Statistics of Delta OCS](#)

[Distribution of Delta OCS](#)

[Customizable Summary](#)

Scatter-plots of OCS Score by Salary

[Current Pay & 2018 SPL](#) [New Pay & 2019 SPL](#)

Part 1 of Appraisal Forms

[Open Existing Evaluation](#)

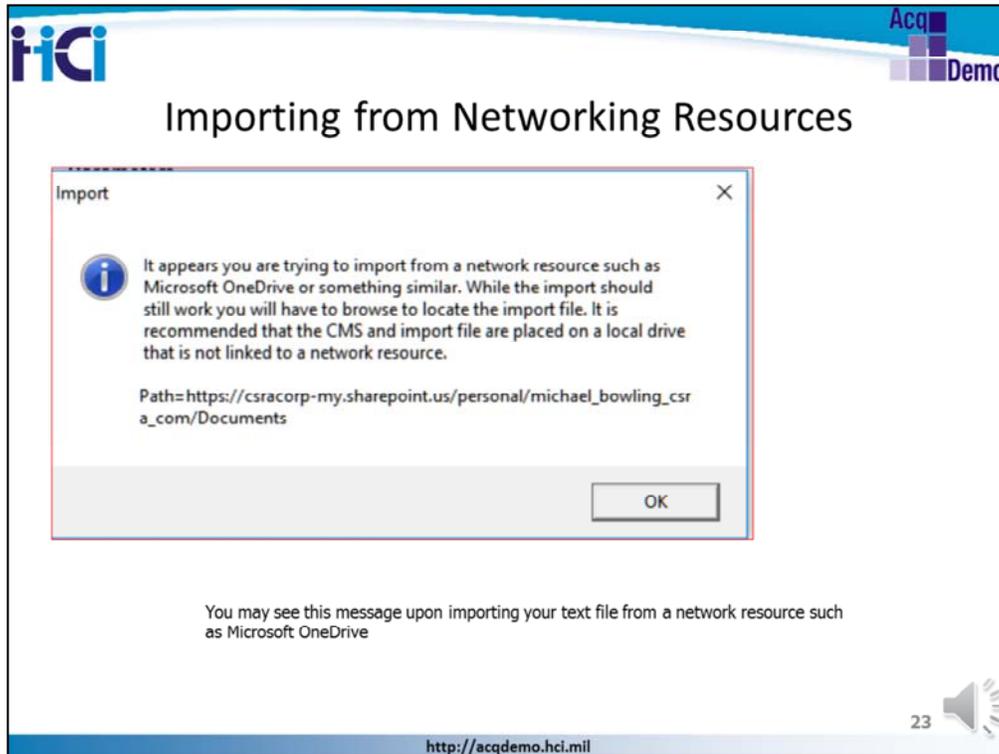
Validate Data, then use the filters to select individuals and use sort to put the data in preferred order.

[Generate Part 1 of Appraisal Forms](#)

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After you enable the macros, it's time to import your records into the CMS using the "Import" button. Remember to have the "import" file saved in the same folder as your CMS.



If you are working in a Cloud environment, you may experience a problem trying to import your text file into your spreadsheet.

This may affect the CMS, the SubPanel and the PAT

If the import does not work, you should save both your import file and your spreadsheet to a local drive, such as your hard drive that is not linked to a network resource.

Make sure your spreadsheet and its import file are both in the same folder.

Acq Demo

Add-ins Function

- Add-ins offer several functionalities such as copy, import, hide, unhide
- The add-in options vary by tab; click on "Add-in" button to reveal available options from the tab you are working in

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The add-in function is available on each tab at the top of your toolbar. Add-ins offer functionalities such as copy, export, hide, unhide, etc. that may not be available in Excel in the CMS.

Click on "Add-in" to reveal the options available for the tab you are working in.

Each tab has its own set of options. For example, the Contents tab offers "copy", "Import", "Export", "Output Charts" and also "Grievance" giving you access to the Grievance Calculator.

The Data tab has many options to help you display records during your pay pool panel meeting including hide, unhide, filter, sort, highlight, column width, as well as Validate your records and clear circles

Compensation Management Spreadsheet

Cycle: 2018 Version: dev 23

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

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

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

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

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

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

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

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

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

Pay Pool Data
[Import](#) [View](#) [Export](#) Last Import: Last Export: Last Modified: Use Today

Parameter
 Clear Wildcard Data? Yes No

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

Customizable Summary

Scatter-plots of OCS Score by Salary
[Current Pay & 2018 SPL](#) [New Pay & 2019 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](#)

<http://acqdemo.hci.mil>

The first time you import your data records for the new cycle, you may have picked up some wildcard data from last year or some remarks you had entered for your Part I.

Entering “yes” clears it all so you can start from scratch for the new cycle.

Entering “no’ keeps it and you can re-use old formulas and remarks from last year.

Once you do a round-trip, whatever is uploaded with the spreadsheet will overwrite what was in CAS2Net last year, including all wildcards

“Import Complete” Indicator

Compensation Management Spreadsheet

Cycle: 2018 Version: dev 23

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 – Compare score distributions to look for anomalies and scale differences. Run preliminary pay adjustment scenarios. Set CR1 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 “Q” Setting – This spreadsheet comes with a best estimate of “Q.” Once you have been notified that “Q” is set, make a final round trip to CASNet. The final “Q” value and related parameters will be included in the download of your payroll data.

Final Compensation Setting – After the final round trip to update “Q”, 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: 7/26/2018 (10:33:41 AM) (CDT)
 Import View Export Last Export: Use Today
 Last Modified: [Yellow bar]

Parameters Import [Progress bar] [Close]

Set CR1 [Save] [OK]

Summary Reports Import Complete!

Rails Report [Save] [OK]

Career

[Summary Statistics of Delta OCS](#)

[Distribution of Delta OCS](#)

[Customizable Summary](#)

Scatter-plots of OCS Score by Salary

[Current Pay & 2018 SPL](#) [New Pay & 2019 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](#)

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As you start importing your data, the Import function displays a blue indicator that shows the progress of the import.

This may take while, so do not press anything until the “Import Complete” message comes up and you click “OK”

The slide features a blue header bar with the 'iCi' logo on the left and 'Acq Demo' on the right. The main content area is white with the title 'Using the Sub Pay Pool Spreadsheet For a Sub Pay Pool' centered in a dark blue font. At the bottom, there is a blue footer bar containing the URL 'http://acqdemo.hci.mil' on the left, the number '27' in the center, and a speaker icon on the right.

Let see how to use the Sub pay pool spreadsheet for a sub pay pool session

The slide features the 'hici' logo in the top left and 'Acq Demo' in the top right. The main title is 'How to Conduct a Sub Panel Meeting'. The content is a bulleted list with four items. At the bottom right, there is a speaker icon and the number '28'. At the bottom center, there is a URL: <http://acqdemo.hci.mil>.

- Offline, sub-panel spreadsheet support
 - Download the spreadsheet from Pay Pool Notices module into CAS2Net
 - Download a data file from CAS2Net
 - Import the data file into the spreadsheet
 - Use file naming convention to identify the correct file

As you do for the CMS, you must first download the latest version of the Sub Panel Spreadsheet from CAS2Net and save it in a folder on your computer.

You must also download an Import file for your subpanel and save it in the same folder where you saved your Sub panel Spreadsheet.

Remember the naming convention: look for a file with the pay pool name, followed by "to_Subpanel" and the name of the Sub Panel manager. All import files will have a 'CSV' extension




Getting Ready for a Sub Panel Meeting

- By the end of October all AcqDemo employees should have completed their self-appraisals and all supervisors should have completed Part II of the appraisal Form containing category scores on each of the three factors, assigned Performance Appraisal Quality Level scores, along with supporting narrative comments for each employee
- By early to mid-November sub panel managers should conduct sub-panel meetings, if applicable. This can be accomplished either using the online sub panel meeting or by using the sub-panel spreadsheet
- First-level supervisors usually participate in the sub-panel meetings



Part I	CCAS Salary Appraisal Form
Part II	Supervisor Assessment
Part III	Employee Self Assessment



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It is important to set aside some time to prepare for the subpanel meetings.

By the end of October, as the PPA, check with the supervisors that all employees have completed their self-appraisals and that the supervisors have completed their appraisals.

You can run a status report from CAS2Net. You can also generate the Part II and Part III reports as read aheads to help pay pool panel members get ready to the meeting.

The supervisors should have assigned categorical scores for each of the 3 factors and also the Performance Appraisal Quality Level scores (PAQL) that they want to recommend to the sub panel members.

Getting Ready for a Sub Panel Meeting (Continued)

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

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Use this short checklist to see if you are ready!

For the Subpanel:

- Make sure all records are up to date in CAS2Net by October 1
- Confirm all self appraisals and supervisor appraisals have been done

You may want to print the Part II and Part III and bring them to the meeting or send as read-ahead

Make sure you apply all PII protection measures when printing reports

The slide features a blue header with the 'iici' logo on the left and 'Acq Demo' on the right. The main title is 'Important Technical Tips'. A single bullet point reads: '• Save your spreadsheet as an .xlsm file unless unavailable'. The footer contains the URL 'http://acqdemo.hci.mil', the number '31', and a speaker icon.

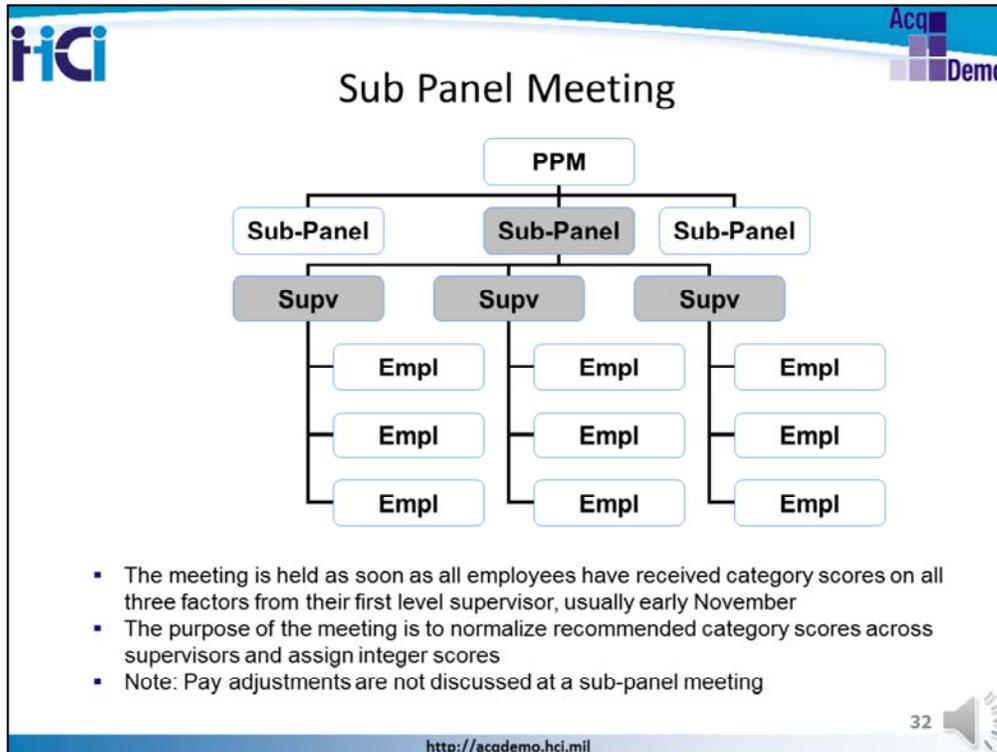
To maintain all Macros in your spreadsheet functional, save it as an “xlsm” which is Excel with Macros.

Not saving the macros will cause your spreadsheet to malfunction or crash next time you want to open it.

As a matter of process, it is a good idea to “export” all data records after each meeting, save it on your computer and upload it to CAS2Net.

If something happens to your spreadsheet because you did not save it as a .xlsm, you can always download a fresh copy and download your saved data from CAS2Net (doing a round trip)

Saving the data and having an organized file naming and folder structure are the key to not losing data!



A sub panel meeting is held to normalize scores across your organization

This ensures that supervisors who tend to score too high or too low are brought in line with the rest of the sub-panel. The Meeting helps supervisors get a shared understanding of the meaning of each score; Most supervisors assign a categorical or preliminary score (such as 2L or 3H) before the sub panel meeting, in CAS2Net. However, some organizations expect supervisors to also assign a numeric score and a performance score. Refer to your organization's business rules to find out what is expected from your supervisors.

It is important to remember that the Sub Panel meeting is expected to normalize scores. It does not discuss any salary or award decisions

For the organization pictured, there would be 4 sub-panels: one for each sub-panel manager to review the employees under the supervisors, and one run by the PPM to rate the supervisors.

The sub-panel managers are direct reports to the PPM and do not go to a sub-panel; however, the PPM reviews the scores of the direct reports with his or her supervisor.

Sub Panel Meeting Process

NH – Job Achievement and/or Innovation

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

For each career path and each factor

1. Put each employee in the contribution matrix based on the first-level supervisor's recommendation
2. By discussing and comparing contributions, move employees between categories
3. Rank order employees within each category
4. Assign integer scores

This is called "normalizing" or "leveling" scores

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Scores need to be consistent across employees based on the factors descriptors and discriminators.

You can use the "Group into Categories" functionality to achieve the normalization of your sub panel's employees scores.

You can visualize your employee's names by category and rank order them to help assign integer scores.

Note that the PAQLs are entered into the spreadsheet data tab directly. The PAQLs are assigned based on the descriptors, not from rank ordering.

Normalize Scores

Sub-Panel Meeting Spreadsheet

Cycle: 2018 Version: dev 12
The purpose of this spreadsheet is to assign preliminary and final contribution scores to employees.

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

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

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

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

Paypool Data Last Import: 7/13/2018 (7:40:35 AM(EDT))
Last Export:
Last Modified: **Use Today**

Scores
[Group into Categories](#) **Click Here**

Summary Reports
[Ralls 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](#)

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<http://acqdemo.hci.mil>

From the "Contents" tab, click on "Group into Categories"

hici Acq Demo

Group into Categories

Group into Categories

Career Path

NH NJ NK

Factor

Job Achievement and/or Innovation

Communication and/or Teamwork

Mission Support

Level

1 2 3 4

Apply

Close

Employee Movement

Up

Left

Right

Down

Move to Unrated

Move from Unrated

Unrated

1L (0 - 5)	1M (6 - 23)	1H (24 - 29)	21
		Butler Bryce (4)	29

This screen emulates the CAS2Net Preliminary Score Module (see next slide)

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Use this screen to group employees into categories based on their contributions

Do this for career path, factor, scoring level

Group into Categories

Based on panel discussion, select employee to move into category; in this example, panel wants to move "Lawrence, Lance" to 3M; to do so, click on the "Move from Unrated" button

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Look at the list of names. During the subpanel meeting, you may get the direction to move people around, whether to rank order them in one category, or to move them to different categorical score, lower or higher level.

In this example, Lance Lawrence is still unrated. Note that you can move any employee to the "Unrated" section if the panel has a difficult time making a decision. You may consider the "Unrated" section as a parking lot until the panel is ready to make a decision.

Let's say that the panel wants to assign a "3M" to Lance. Click on his name and then click the button that says "Move from Unrated"

Group into Categories

Group into Categories

Career Path: NH N1 NAC

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

Level: 1 2 3 4

Employee Movement: Up, Down, Left, Right

Unrated: Lawrence Lance (3) 75, Hoang Danielle (3) 78, Yeakley Yolanda (3) 78

Assign Categorical Sc...
Name: Lawrence Lance (3)
Score: 3M
Apply Cancel

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<http://acqdemo.hci.mil>

- The “Assign Categorical Score” interface appears
- Click on drop down list and select “3M”
- Click on the “Apply” button

Use the Assign categorical score interface to assign the categorical score that gets decided by the sub panel members
 Make sure the click on the “apply” button

The screenshot shows a software interface titled "Group into Categories". At the top left is the "hici" logo, and at the top right is the "Acq Demo" logo. The main area is divided into several sections:

- Career Path:** Radio buttons for NH (selected), NJ, and NK.
- Factor:** Radio buttons for Job Achievement and/or Innovation (selected), Communication and/or Teamwork, and Mission Support.
- Level:** Radio buttons for 1, 2, 3 (selected), and 4.
- Employee Movement:** A diagram with "Up", "Down", "Left", and "Right" arrows. Below it are buttons for "Move to Unrated" and "Move from Unrated".
- Unrated:** A list of employees: "Hosung Danielle (1) 78" and "Yeakley Yolanda (3) 78".
- Employee Lists:** Three columns of employees with their scores:

2H (62 - 66)	3L (61 - 66)	3M (67 - 70)	3R
Artis Amy (2) 65		Evans Erin (3) 78	
Farnsworth Fred (2) 65		Hummer Hershel (3) 78	
Grimes Garth (2) 65		Jerris Jane (3) 78	
Harris Henry (2) 65		Vinson Violet (3) 78	
Reid Richard (2) 65		Sorenson Sarah (3) 77	
Ulanov Uli (2) 65		Udell Vincent (3) 77	
Zurbriggen Zack (2) 65		Hansen Ike (3) 76	
Cavison Carmen (2) 64		Appleton Adams (3) 75	
		Mucker Mark (3) 75	
		Babbitt Chris (3) 72	
		Calon Connie (3) 72	
		Files George (3) 72	
		Quarles Richard (3) 71	
		Stewart Tammy (3) 71	
		Tarjan Tawdree (3) 71	
		Lawrence Lance (3) 75	

On the right side, there are three bullet points:

- Employee appears in 3M column
- As panel discussions continue, you may further move employee using the "Employee Movement" buttons
- To move employee to a lower level, highlight employee's name and click "Left"

At the bottom, there is a URL <http://acqdemo.hci.mil>, a speaker icon, and the number 38.

Another way to assign scores is to move the name of the employee to another column.

In this example, let's assume that the sub panel members now decide to change Lance Lawrence's score to a 3L

Locate the Employee Movement interface (top middle). All you need to do is highlight the name of the employee and click on the "left" button to move the employee to the "3L" column –

Group into Categories

Group into Categories

Career Path
 NH NJ NK

Factor
 Job Achievement and/or Innovation
 Communication and/or Teamwork
 Mission Support

Level
 1
 2
 3
 4

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

Unrated
 Hoang Danielle (3) 78
 Yeakley Yolanda (3) 78

1H (62 - 66)	3L (61 - 66)	3M (67 - 78)	3H
Artis Amy (2) 65	Lawrence Lance (3) 66	Evans Erin (3) 78	
Farnsworth Fred (2) 65		Hummer Hershel (3) 78	
Grimes Garth (2) 65		Jerris Jane (3) 78	
Harris Henry (2) 65		Vinson Violet (3) 78	
Reid Richard (2) 65		Sorenson Sarah (3) 77	
Ulanov Uli (2) 65		Udell Vincent (3) 77	
Zurbruggen Zack (2) 65		Hansen Ike (3) 76	
Cavazos Carmen (2) 64		Appleton Adam (3) 75	
		Mucker Mark (3) 75	
		Babbitt Chris (3) 72	
		Caton Connie (3) 72	
		Files George (3) 72	
		Quaries Richard (3) 71	
		Stewart Tammy (3) 71	
		Larman Timothy (3) 71	

Employee is now in the "3L" column

<http://acqdemo.hci.mil>

This screen confirms that Lance Lawrence has been assigned to the "3L" category

Group by Category

Group into Categories

Career Path: NH NJ NK

Factor: Job Achievement and/or Innovation Comuncation and/or Teamwork Mission Support

Level: 1 2 3 4

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

Unrated

2H (62 - 66)		3L (61 - 66)	
Artis Amy (2)	65	Lawrence Lance (3)	3
Farnsworth Fred (2)	65	Hoang Danielle (3)	3
Grimes Garth (2)	65	Yeakley Yolanda (3)	3
Harris Henry (2)	65		
Reid Richard (2)	65		
Ulanov Ull (2)	65		
Zurbrigen Zack (2)	65		
Cavasos Carmen (2)	64		

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

The Employee Movement interface is available for moving employees to a higher category (right), a lower category (left), and also to rack and stack employees within a category, with up or down buttons.

As seen earlier, use the “move to unrated” if the sub panel members cannot make an immediate decision on a score for any employee. Once they are ready to decide on a score, use the “move from unrated” to assign the score

Other functions include grouping by career path, by factor and by level

Assign Integer Score

Group into Categories

Career Path: NH N1 NK

Factor: Job Achievement and/or Innovation Comuncation and/or Teamwork Mission Support

Level: 1 2 3 4

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

Unrated

Apply, Close

2H (62 - 66)	3L (61 - 66)
Artis Army (2) 65	Lawrence Lance (3)
Farnsworth Fred (2) 65	Hoang Danielle (3)
Grimes Garth (2) 65	Yeakley Yolanda (3)
Harris Henry (2) 65	
Reid Richard (2) 65	
Ulanov Uli (2) 65	
Zurbriggen Zack (2) 65	
Cavasos Carmen (2) 64	

Assign Integer Score

Name Lawrence Lance (3)

Category: Job Achievement

Pre-Score: 3L

Final Score: [dropdown menu]

Apply, Cancel

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- To assign a score, double click on employee's name
- Select a score from the drop down list of the "Assign Integer Score" interface

Once the sub panel members are satisfied that employees are similar in their contribution within each category, it is time to start assigning integer or numeric scores.

Double click on an employee's name to display the "assign integer score" interface
From the drop down list, select the integer score decided by the sub panel members.

Note that the list of available scores will be limited to the scores aligned with the categorical score that was assigned to the employee

Group into Categories

Career Path
 NH NJ NK

Factor
 Job Achievement and/or Innovation
 Comuncation and/or Teamwork
 Mission Support

Level
 1
 2
 3
 4

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

Unrated

Apply
 Close

2H (62 - 66)	3L (61 - 66)
Artis Amy (2) 65	Lawrence Lance (3) 63
Farnsworth Fred (2) 65	Hoang Danielle (3)
Grimes Garth (2) 65	Yeakley Yolanda (3)
Harris Henry (2) 65	
Reid Richard (2) 65	
Ulanov Uli (2) 65	
Zurbriggen Zack (2) 65	
Cavazos Carmen (2) 64	

Lawrence, Lance has an integer score of 63

Note that the preliminary and numerical score changes show up in the data tab

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In our example, Lance Lawrence was assigned a numerical score of 63.

The numerical score is displayed next to the employee's name; the score will also be reflected in the data tab and other applicable tabs after you hit the apply button. You do not have to re-enter the numeric score in the data tab.

Data Tab

Columns: Y, Z, AA, AB, AC, AD, AE, AF, A

	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
	3M	3M	3M	77	77	77	5	5	
	3M	3M	3M	72	72	72	3	3	
	3M	3M	3M	72	72	72	3	3	

Here is the main data entry section of the data tab.

Note that all of the cells are yellow meaning they are editable

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This is the main data entry section of the Data Tab. Note that data entered using group into categories will appear in columns Y to AD

Rank Order

Return to Main Menu
Return to Data
Factor Matrix
All NH NJ NK

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

Rank Order
Lowest to Highest

Rank Order
Highest to Lowest

Rank Order
Lowest to Highest
by Broadband

Rank Order
Highest to Lowest
by Broadband

All Career Paths			NH Career Path		
2018 OCS Lvl			Job Achievement Lvl		
NK Freeman Francis	2	45	Curtiss Dan	4	99
NK Donaldson Dennis	2	45	Evans Francis	4	99
NK Irlitz Ivan	3	55	Gonzalez Helen	4	100
NK Karnes Keith	2	45	Iverson John	4	100
NK Williams Wilson	2	44	Quarles Richard	3	71
NK Amdt Aaron	2	26	Stewart Tammy	3	71
NK Dancy Dyanne	1	28	Lidell Vincent	3	77
NJ Garfield George	4	82	Babbitt Chris	3	72
NJ Yaley Zane	4	82	Fites George	3	72
NJ O'Connor Olive	4	82	Hansen Ike	3	76
NJ Parsons Patricia	3	60	Artis Amy	2	65
NJ Rhone Ronald	3	60	Celton Connie	3	72
NJ Hoang Andrew	1	29	Evans Erin	3	78
NJ Hoang Eric	1	29	Farnsworth Fred	2	65
NH Cutiss Dan	4	99	Grimes Garth	2	65
NH Evans Francis	4	99	Harris Henry	2	65
NH Gonzalez Helen	4	100	Jerris Jane	3	78
NH Iverson John	4	100	Lawrence Lance	3	75
NH Quarles Richard	3	71	Martinez Mary	3	
NH Stewart Tammy	3	71	Nance Nolan	3	
NH Lidell Vincent	3	77	Sorenson Sarah	3	77
NH Babbitt Chris	3	72	Tarman Timothy	3	71
NH Fites George	3	72	Ulanov Uri	2	65
NH Hansen Ike	3	76	Vinson Violet	3	78
NH Artis Amy	2	65	Yeakley Yolanda	3	78
NH Celton Connie	3	72	Zurbrigg Zack	2	65
NH Evans Erin	3	78	Butler Bryce	4	29
NH Farnsworth Fred	2	65	Cavalos Carmen	2	64
NH Grimes Garth	2	65	Emerson Erica	2	64
NH Harris Henry	2	65	Michelson Nancy	4	100
NH Jerris Jane	3	78	Burns Barns	2	30
NH Lawrence Lance	3	75	Hoang Danielle	3	78
NH Martinez Mary	3	67	Hummer Hershel	3	78
NH Nance Nolan	3	79	Appleton Adam	3	75
NH Sorenson Sarah	3	77	Mudler Mark	3	75
NH Tarman Timothy	3	71	Reid Richard	2	65

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

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

The Rank Order interface gives you a way to sort employees based on their score and also group them by factor and/or career path. It sorts the scores from highest to lowest or lowest to highest by career path

This functionality is available from the Matrix tab of the Sub Panel Spreadsheet

Rails Report

[Return to Main Menu](#)

Rails Report

Final

Rail Zone	NH		NJ		NK		Total	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
A	4	11.1%	0	0.0%	0	0.0%	4	8.0%
C1	1	2.8%	0	0.0%	1	14.3%	2	4.0%
C2	5	13.9%	1	14.3%	2	28.6%	8	16.0%
B	26	72.2%	6	85.7%	4	57.1%	36	72.0%
Total	36	100.0%	7	100.0%	7	100.0%	50	100.0%

Definition of Rail Zone
 Inappropriately compensated above the rails
 Appropriately compensated between the rails > SPL
 Appropriately compensated between the rails <= SPL
 Inappropriately compensated below the rails

Upper and Lower Rails

	GS-1 Step 1	SPL base	CCS	Upper Rail	Lower Rail	SPL
2018	\$18,526	10200426	min	100	\$20,409	\$17,366
			max	15.00	\$196,025	\$166,964
					\$166,964	\$181,504

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

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The rails report is available from the Rails tab of the Sub Panel spreadsheet

The definition of the various Rails is displayed on the right side of the screen.

This report allows pay pool panel members to see the distribution of employees in the A zone (above the upper rail), the B zone (below the lower rail), C1 zone which is above the SPL but on or below the upper rail, and C2 zone, which is on or below the SPL but on or above the lower rail

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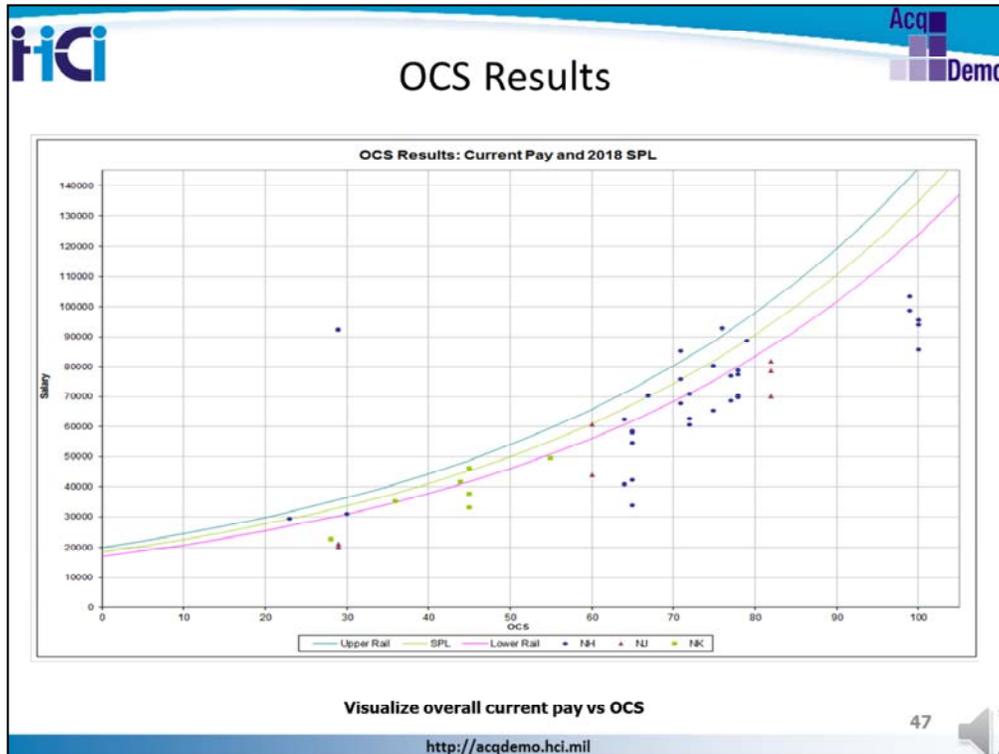
Rails Report

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

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The rails report displays both counts and percentages by zone



The OCS Results current pay and 2018 SPL shows the distribution of current pay to OCS for each employee, represented by a dot.

This is a good visual for sub pay panel members to look at, to assess how their workforce is distributed across the zones

If there are less than 256 people in the subpanel, the name of each employee and their current salary is displayed if you hover the mouse over the dot

Note that a different shape and color of dot is used for each career path.

hici **Acq Demo**

**Using the CMS Spreadsheet
for a Pay Pool**

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We are now going to review how to use the Compensation Management Spreadsheet for a pay pool panel meeting

Acq Demo

Pay Pool Meeting

```

graph TD
    PPM[PPM] --- SP1[Sub-Panel]
    PPM --- SP2[Sub-Panel]
    PPM --- SP3[Sub-Panel]
    SP1 --- S1[Supv]
    SP2 --- S2[Supv]
    SP3 --- S3[Supv]
    S1 --- E1_1[Empl]
    S1 --- E1_2[Empl]
    S1 --- E1_3[Empl]
    S2 --- E2_1[Empl]
    S2 --- E2_2[Empl]
    S2 --- E2_3[Empl]
    S3 --- E3_1[Empl]
    S3 --- E3_2[Empl]
    S3 --- E3_3[Empl]
  
```

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

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The pay pool meeting usually is held following the completion of all sub pay pool panel meetings.

While sub pay pool meetings were focused on normalizing and assigning numeric scores, the pay pool meeting focuses on normalizing scores across all subpanels and also making decisions on pay adjustments and awards. Recall that money decisions are not made in sub panel meetings.



Conducting a Pay Pool Panel Meeting

Conducting a Pay Pool Panel Meeting

- Meeting must be done offline: computations are done in the CMS only
- Download the CMS spreadsheet from the Pay Pool Notices module of CAS2Net
- Download the entire pay pool data file from CAS2Net
- Import the data file into the CMS Spreadsheet
- Importing a Pay Pool data file is the same as importing a Sub-Panel data file; remember the file naming convention to help you select the correct file

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Before starting your pay pool panel meeting, make sure that you have downloaded the latest CMS from CAS2Net pay pool notices.

Import your pay pool data into the CMS from the Import file, which you downloaded from CAS2Net

When selecting the import file from CAS2Net, make sure you select the one that says “to cms” in the filename, not the sub pay pool import file

Offline Interface - Download Compensation Management Spreadsheet

Cycle 2018 Version: dev 25
The purpose of this spreadsheet is to record appraisal scores and set basic pay rates and contribution-based financial awards.

NOTE: Files are dynamically generated and the server is busy. Please be patient and do not repeatedly request files. To save a linked file to your computer, use a right-click and 'Save As' option. Sub-Panel Meeting choices without hot links for the file will contact your pay pool administrator if you need it.

Paypool

- AMC/LH
 - ppAMCLH_to_CMS.csv
 - ppAMCLH_to_Sub-Panel_Chri
 - ppAMCLH_to_Sub-Panel_Frar
 - ppAMCLH_to_Sub-Panel_Nan
 - ppAMCLH_to_Sub-Panel_No
 - ppAMCLH_to_Sub-Panel_Tom

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

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

Score Normalization - Compare score distributions to look for anomalies and grade 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 "public-use" are locked. To preserve your work, export the data from this spreadsheet and upload to CASNet before changing any information in CASNet.

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

Final Compensation Setting - After the final round trip to update "Q", 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 Date
Import View Export
Last Import: 7/24/2018 (10:55:52 AM)GMT
Last Export: []
Last Updated: [] Use Today

Parameters
Set CRI and CA Parameters

Summary Reports
Risks Report
Career Path Factor Metrics ranked by Final Score
Summary Statistics of Delta OCS
Distribution of Delta OCS
Customizable Summary

Scatterplots of OCS Score by Salary
Current Pay & 2018 SPL New Pay & 2019 SPL

Part 1 of Appraisal Form
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 Form

Cycle	CRN	CRI Set-As	Awd Set-As	Beta 1	ICR Beta 2	ICA Minimum	Min CRI	C	Min CA	at	Type	Pay Cap 2	Pay Cap 2:FirstYear					
2018	2,26	0	1	0	0	1	0	0	0	0	PAY	165500	164200					
G	SPLstep1	SPLbase	NHS	NH2	NH3	NH4	NI1	NI2	NI3	NI4	NK1	NK2	NK3					
1.4	1.020043	34099	69951	99951	138572	34099	52341	69951	99951	34099	47264	63663	Rate 2019	28.02	21.16			
18785	1.020043	33629	68983	98137	136659	33629	51623	68983	98137	33629	46629	62787	Rate 2018	28.02	21.16			
Last Name First Name Middle Initial Suffix ID Paypool Office Suffix W/IDCard 1?Presumpt/Retained F Career Pat Broadband Occ Series Starting In From Term Locality C/P																		
Burns	Barry										0	NH	2	1315	50508	LA		
Michelson	Nancy										0	NH	4	830	106788	LA		
Norris	Henry										0	NH	2	830	66309	LA	85	
Tarman	Timothy										0	NO	3	340	67098	Yes	70	
Arnitt	Aaron										3	0	NK	2	322	42854	LA	41
Curtiss	Dan										0	0	NK	3	318	61355	LA	89
Hansen	Ike										1	NO	4	802	128700	LA	87	

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Let review the import process for the CMS

Start with CAS2Net and select your import file. Download and save to your computer, in the same folder where you have saved your CMS

Open your CMS and enable macros. Click on Import from from the Content tab to view and select your import file.

Parameter Setting for First Year

First year pay pools should check the first cycle box and set CI funding to 2.4% and CA funding to 1.3%

Scenario Summary

GPI (G)%	1.40		
GS-1/step1 pay (19)	\$ 19,048		
GS-1/step1 pay (18)	\$ 18,785		
		Cash Amount	Plus Unused GPI
CRI%	2.400000%	\$79,045	\$85,276
CRI Set-Aside 0 % 0 \$	0.000000%	\$0	
Award%	1.300000%	\$49,407	
Award Set-Aside 0 % 0 \$	0.000000%	\$0	
Beta 1 (CRI)	0		
Beta 2 (Award)	1		
Minimum CRI Dollar Amount	\$0		
Minimum CRI Carryover Amt	\$0		
Minimum Award Dollar Amount	\$0		

Check box if this is your organization's first cycle in AcqDemo

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

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

Start with little or no CRI and CA set-aside and increase it gradually. If you reduce the set-aside after allocating your discretionary funds, your remainder will go negative and you will have to delete all or some of your allocations and start over again. Set aside may change if rollover amount changes. The cash award amount is 96% of the total award budget.

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The Parameter tab allows you to tailor your pay pool parameters based on your business rules. The standard funding ceiling for FY18 is 2.26% for CRI and 1% for CA

You can edit the pre-populated yellow cells as required by your pay pool.

For example, you can enter a CRI set aside, either % or \$, that your pay pool can distribute as a discretionary CRI

Refer to the 2018 Funding Guidance Letter from the PMO for guidelines.

Acq Demo

Data Sheet: Override Options

Copy to Opt Sig

Start Date	CRI Override?	CA Override?	Rollover CRI to CA?	1st Level Sup Name	Sub-Panel Managers Meeting	Pay Pool Manager Name
12-Aug-01	0	0	1	Helen Gonzalez	Chris Babbitt	Bob Arnold
29-Sep-00	0	0	1	Francis Evans	Chris Babbitt	Bob Arnold
1-Feb-99	0	0	1	Tammy Stewart	Chris Babbitt	Bob Arnold
1-Feb-99	0	0	1	Vincent Udell	Chris Babbitt	Bob Arnold
1-Feb-99	0	0	1	Trish Flynn	Trish Flynn	Trish Flynn

- CRI Override set to 1 means the employee does not receive a CRI payout from the CRI computation algorithm
- The supervisory hierarchy comes from CAS2Net

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In the Data Sheet, use the Override options to tailor the way you want to calculate employees' pay and/or award

For example, for someone who is retiring, override their CRI (set to 1) since they won't be receiving future paychecks; same for CA; the Override function removes the employee's from the algorithm

You also have a way to rollover to CA automatically to get the whole payout as an award: just select "1" in the "Rollover CRI to CA" column

The CMS will automatically roll over to a carry-over award any CRI money that cannot be earned due to hitting a pay cap, hitting control point, or being on retained pay

- Use the columns shown to enter names that will be shown under the signature block on the Part I Form for each employee.
- Use this if you want to display the rater's name – may be useful if signature is not easy to read.
- Also, enter optional remarks for the Part I Form for each employee.

Part 1: Optional Signature	Part 1: Remarks
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>



In the Data sheet, you can optionally enter the name of the supervisor and additional comments or remarks, which will be displayed in the Part I form

Acq Demo

Data Sheet: CRI Section

- Gray highlighting means the employee is not eligible for discretionary CRI
- Yellow highlighting means they are eligible
- Note that the spreadsheet enforces the several pay caps that apply – there are more than just the top of the pay band (see table below)

Set CRI	Default	Total CRI	G carry-over
2.26%	\$80,647	\$80,647	\$6,231.00
	Discretionary=	-850	CRI Budget =
	Computed=	\$80,587	CRI Set Aside =
			Alpha=
			0.2313H

Available Balance	Default CRI	FFPM Input Discretionary CRI	Computed CRI \$	Computed CRI %	Computed Base Pay 2018	Max Allowable CRI %	Allow to exceed 20% limit	CY 2018 LR Pay	CY 2018 LR Pay
\$3,174	\$0	\$0	\$3,174	6.28%	\$54,450	20.00%	0	\$70,405	\$59,975
\$6,288	\$0	\$6,288	\$6,288	5.89%	\$114,572	20.00%	0	\$146,717	\$124,981
\$445	\$0	\$445	\$445	0.67%	\$67,683	6.00%	0	\$74,724	\$63,654
\$0	\$0	\$0	\$0	0.00%	\$87,549	0.00%	0	\$94,816	\$80,769
\$0	\$0	\$0	\$0	0.00%	\$52,237	0.00%	0	\$38,057	\$32,419
\$2,587	-\$10	\$2,577	\$2,577	3.42%	\$79,025	20.00%	0	\$94,816	\$80,769
\$696	\$0	\$696	\$696	1.16%	\$61,552	6.00%	0	\$69,022	\$58,797
\$3,551	-\$50	\$3,501	\$3,501	4.36%	\$84,882	20.00%	0	\$104,706	\$89,194
\$0	\$0	\$0	\$0	0.00%	\$92,387	0.00%	0	\$91,126	\$77,626
\$4,767	\$0	\$4,767	\$4,767	6.36%	\$80,817	20.00%	0	\$104,706	\$89,194
\$2,754	\$0	\$2,754	\$2,754	2.26%	\$106,528	20.00%	0	\$146,717	\$124,981

Category	General Pay Increase	Contribution Rating Increase	Contribution Award	Locality Pay
Inappropriately Compensated -A	Could be reduced or denied	NO	NO	YES
Appropriately Compensated -C	YES	YES— Up to 6% May not exceed upper rail of NPR for employee's OCB or maximum salary for current broadband level.	YES Pay pool manager approves up to \$10,000. Amounts exceeding \$10,000 require local commander's approval.	YES
Inappropriately Compensated -B	YES	YES— Up to 20% Over 20% requires local commander's approval. May not exceed 8% above the lower rail or the maximum salary for current broadband level.	YES	YES

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The CMS color convention is the same as the Sub Panel Spreadsheet. Grey means it is not applicable, yellow means you can edit the content of a cell; white is not editable.

The Data sheet CRI section includes a column to enter any discretionary amounts – note that Discretionary CRI that can be negative or positive this but cannot be If negative, the unspent amount goes into the pot and gets recovered to others

The CMS enforces pay caps, such as the ones displayed in the table by Zone.

Control points can be set for each employee

Computed Base Pay 2019	Max Allowable CRI %	Allow to exceed 20% limit	CY2019 UR Pay	CY2019 LR Pay	Control Point	Allow Over Control Point?	Max Base Pay 2019	Approved CRI \$	New Base Pay 2019
\$54,450	20.00%	0	\$70,405	\$59,975		0	\$61,389	\$3,174	\$54,450
\$114,572	20.00%	0	\$146,717	\$124,981	\$129,641	0	\$129,641	\$6,288	\$114,572
\$67,683	6.00%	0	\$74,724	\$63,654		0	\$69,951	\$445	\$67,683
\$87,549	0.00%	0	\$94,816	\$80,769		0	\$87,549	\$0	\$87,549
\$62,237	0.00%	0	\$38,057	\$32,419		0	\$62,237	\$0	\$62,237

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The CMS lets you set Control points to support your organization’s business rules.

The PPAs enter the control point amount into the “Control Point” point for each affected employee. Once entered, PPA can specify whether the control point can be overridden by entering “1” in that cell

For example, entering 1 next to “\$129,641” would bypass the effect of the control point. The employee’s pay would be capped at “\$129,641” if the cell remains “0”, which would activate the control point.

Carry-Over Awards

Acq Demo

- Note that Carry-Over Awards are shown in column CT
- Column CX shows the sum of any Carryover Award, Computed Award and/or Discretionary Award
- A cell near the top of columns CV shows the total of carry-over awards

CS	CT	CU	CV	CW	CX	CY	CZ	DA
Set Award 1.00%	Total Carryover Award = \$1,624		Available Award Dollars = \$38,005.00		Discretionary Set-Aside = \$0			
	Total CA Pos Delta Y = \$373,850		Discretionary Set-Aside = \$0		Alpha2 = 0.101656			
	Total Default Award = \$37,992							
	Total Discretionary Award = \$0							
	Total Award = \$39,616							
	Remainder = \$13,370							
Carryover Award	CA Pos Delta Y	Computed Award	PPM Input Discretionary Award	Total Award	WildCard 5	Award > \$10K?	Appraisal Rating?	
\$0	\$14,365	\$1,460	\$0	\$1,460			5	
\$0	\$29,625	\$2,899	\$0	\$2,899			6	
\$0	\$2,607	\$265	\$0	\$265			5	
\$0	\$0	\$0	\$0	\$0				
\$0	\$0	\$0	\$0	\$0			3	
\$0	\$12,054	\$1,225	\$0	\$1,225			5	
\$0	\$3,642	\$370	\$0	\$370			6	
\$0	\$16,310	\$1,658	\$0	\$1,658			5	
\$0	\$0	\$0	\$0	\$0			4	
\$0	\$21,567	\$2,192	\$0	\$2,192			5	
\$0	\$13,248	\$1,346	\$0	\$1,346			5	
\$0	\$10,295	\$1,037	\$0	\$1,037			5	
\$0	\$2,304	\$234	\$0	\$234			5	
\$0	\$1,085	\$110	\$0	\$110			5	
\$0	\$14,503	\$1,474	\$0	\$1,474			4	
\$0	\$29,277	\$2,976	\$0	\$2,976			5	
\$0	\$105	\$10	\$0	\$10			5	
\$0	\$0	\$0	\$0	\$0			3	
\$0	\$0	\$0	\$0	\$0			4	
\$0	\$2,209	\$224	\$0	\$224			5	

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In the CA section, the pay pool panel members can see any carryover award in column CT; the sum of all carryover awards is displayed in column CV, at the top.

The pay pool can decide on discretionary awards. The PPA enters the communicated dollar amounts in column CW

hici Pay Pool Meeting: Check Delta Stats Scores **Acq Demo**

Return to Main Menu | View Delta OCS Distribution | Delta Plot Grouping: Supervisor, Office Symbol, Worksheet Count | Show All | Hide with only one employee

Summary Statistics of Delta OCS Score

	Average Delta OCS Score	Standard Deviation	
Overall	3.43	10.52	
NJ	-4.00	11.73	
NK	7.75	7.30	
Helen Gonzalez	2.33	8.74	3
Bo Hansen	1.00	3.46	3
John Larson	9.00	0.00	2
Peter Olson	4.75	9.50	4
Richard Quares	3.00	13.75	3
Tammy Stewart	0.00	1.41	2
Tosh Flynn	-23.00	N/A	1
Vincent Udell	0.50	0.71	2
NJ			
Eileen Daniels	13.00	N/A	1
John Larson	3.00	N/A	1
Nancy Nicholson	-18.00	N/A	1
Tammy Stewart	-5.00	N/A	1
Zane Yaley	-8.50	10.61	2
NK			
Eileen Daniels	10.00	N/A	1
Helen Gonzalez	-1.00	N/A	1
Bo Hansen	5.00	0.72	3
Richard Quares	10.00	N/A	1
Tammy Stewart	11.00	N/A	1
Vincent Udell	3.00	N/A	1
Overall	5.50	7.70	2
Chris Babbitt	1.50	2.12	2
Dan Curtis	10.00	6.29	5
Eileen Daniels	10.00	N/A	1
Francis Evans	10.00	N/A	1
George Fies	10.00	10.52	3
Helen Gonzalez	1.50	7.33	4
Bo Hansen	3.00	6.32	6
John Larson	7.00	3.46	3
Nancy Nicholson	-18.00	N/A	1
Peter Olson	4.75	9.50	4
Richard Quares	4.75	11.75	4
Tammy Stewart	1.50	6.81	4
Tosh Flynn	-23.00	N/A	1
Vincent Udell	3.53	4.53	3
Zane Yaley	-8.50	10.61	2

Look for extreme or unusual average delta OCS values by supervisor

Contents | Parameters | Data | Matrix | Rals | Delta Stats | Delta Plot | Cur OCS | 58

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Anytime during the pay pool meeting, it is a good idea to check the Delta Stats tab for unusual OCS values .

While it is not necessarily wrong, it may indicate that the normalization of the scores has not been completed

Acq Demo

Pay Pool Meeting: Check Rank Ordered Data

1 Return to Main Menu
 2 Return to Data
 3 Factor Matrix
 4 All NH NJ NK

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

All Career Paths				NH Career Path												NJ Career Path			
2010 OCS				Final Scores												2010 OCS			
	Lvl	Scr		Job Achievement and/or Innovation	Lvl	Scr	Communication and/or Teamwork	Lvl	Scr	Mission Support	Lvl	Scr		Lvl	Scr	Job Achievement and/or Innovation	Lvl	Scr	
NH Gonzalez Helen	4	104		Malinetz Mary	3	Malinetz Mary	3	Malinetz Mary	3	Gonzalez Helen	4	104		Yano Zane					
NH Butler Bryce	4	100		Zubriggen Zack	2	Zubriggen Zack	2	Zubriggen Zack	2	Butler Bryce	4	100		Hansen Rita					
NH Hutchinson Nancy	4	99		Nance Nolan	3	Nance Nolan	3	Nance Nolan	3	Hutchinson Nancy	4	99		Phonse Ronald					
NH Evans Francis	4	99		Emerson Erica	2	Emerson Erica	2	Emerson Erica	2	Evans Francis	4	99		Tarman Timothy					
NH Iverson John	4	99		Hutchinson Nancy	4	99	Butler Bryce	4	100	Gonzalez Helen	4	104		O'Connor Olive					
NH Vinson Violet	3	83		Evans Francis	4	99	Hutchinson Nancy	4	99	Butler Bryce	4	100	Vinson Violet	3	83		Huang Eric		
NH Huang Darvella	3	83		Gonzalez Helen	4	99	Evans Francis	4	99	Hutchinson Nancy	4	99	Huang Darvella	3	83				
NH Appleton Adam	3	83		Iverson John	4	99	Gonzalez Helen	4	99	Evans Francis	4	99	Appleton Adam	3	83				
NH Yano Zane	4	82		Butler Bryce	4	99	Iverson John	4	99	Iverson John	4	99	Udell Vincent	3	82				
NH Udell Vincent	3	82		Vinson Violet	3	83	Vinson Violet	3	83	Vinson Violet	3	83	Celan Cornee	3	82				
NH Celan Cornee	3	82		Huang Darvella	3	83	Huang Darvella	3	83	Huang Darvella	3	83	Quates Richard	3	82				
NH Quates Richard	3	82		Appleton Adam	3	83	Appleton Adam	3	83	Appleton Adam	3	83	Evans Eric	3	82				
NH Evans Eric	3	82		Udell Vincent	3	82	Udell Vincent	3	82	Udell Vincent	3	82	Lawrence Lance	3	82				
NH Lawrence Lance	3	82		Celan Cornee	3	82	Celan Cornee	3	82	Celan Cornee	3	82	Mucker Mark	3	82				
NH Mucker Mark	3	82		Quates Richard	3	82	Quates Richard	3	82	Quates Richard	3	82	Martinez Mary	3	77				
NH Martinez Mary	3	77		Evans Eric	3	82	Evans Eric	3	82	Evans Eric	3	82	Sorenson Sarah	3	77				
NH Sorenson Sarah	3	77		Lawrence Lance	3	82	Lawrence Lance	3	82	Lawrence Lance	3	82	Nance Nolan	3	77				
NH Nance Nolan	3	77		Mucker Mark	3	82	Mucker Mark	3	82	Mucker Mark	3	82	Babitt Chris	3	75				
NH Babitt Chris	3	75		Sorenson Sarah	3	77	Sorenson Sarah	3	77	Sorenson Sarah	3	77	Yankler Yolanda	3	74				

Rank Order Highest to Lowest
 Rank Order Lowest to Highest
 Rank Order Highest to Lowest by Broadband

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

Ready Scroll Lock

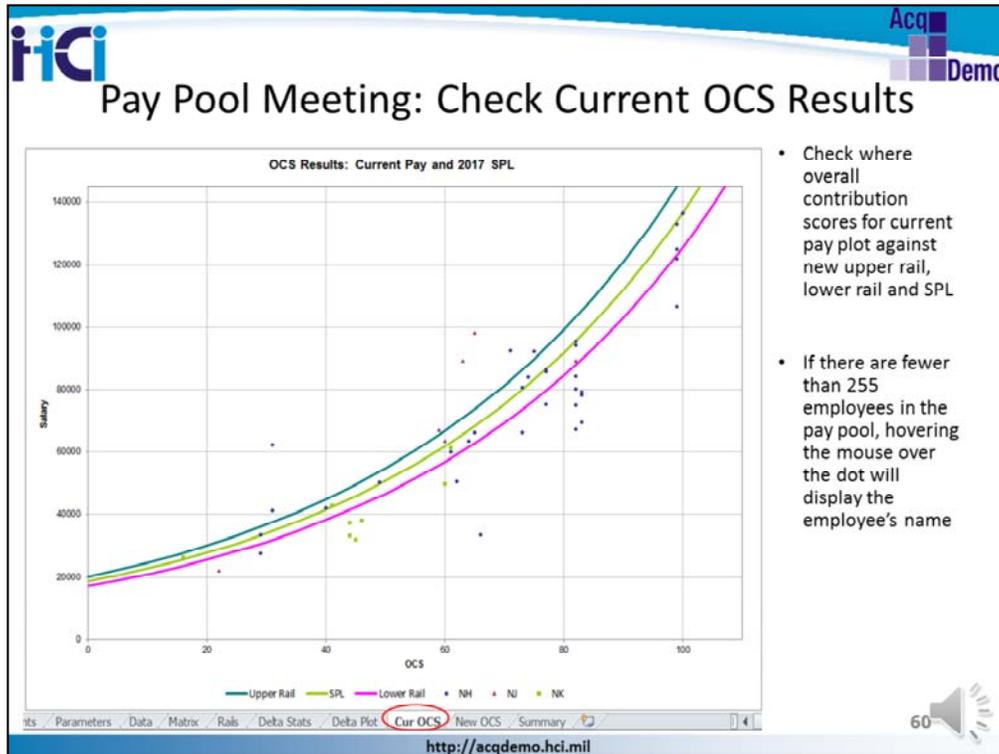
In the Matrix worksheet, check scores by career path and factor

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The CMS Matrix is similar to the Sub Panel Spreadsheet Matrix tab.

The PPA can check scores by career path and factor and display the results to the pay pool panel members for further assessment



The Current OCS tab shows the distribution of employees across the zones (A, B, and C)

If you hover over a point, you will see the employee's name and scores.

Note that if you have more than 255 employees in your pay pool, you need to go back to data sheet to see the data

Acq Demo

Pay Pool Meeting: Change Scores

AE AF AG AH AI AJ AK AL AM AN

Set Scores

Job	Categorical			Final			PAQL		
	Job Achievement for Innovation	Communication for Teamwork	Mission Support	Job Achievement for Innovation	Communication for Teamwork	Mission Support	Job Achievement for Innovation	Communication for Teamwork	Mission Support
2H	2H	2H	2H	62	65	66	3	3	3
4H	4H	4H	4H	99	99	99	5	5	5
2H	2H	2H	2H	65	65	65	3	3	3
2L	2L	2H-L	2H-L	28	28	36	1	3	3
3M	3M	3M	3M	77	77	77	3	3	3
3H	3H	3H	3H	82	82	82	3	5	3
3M	3M	3M	3M	74	77	73	5	3	3
3H	3H	3H	3H	82	82	82	3	5	3
4H	4H	4H	4H	99	99	99	5	5	5
4H	4H	VH-H	4H	99	99	115	5	5	5
4H	4H	4H	4H	99	99	99	5	5	5
3H	3H	3H	3H	82	82	82	3	5	3

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

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The CMS does not have a “GROUP into CATEGORIES” functionality such as in the Sub Panel Spreadsheet.

You need to enter changes to scores and PAQL directly into the data tab.

If you change a numerical score, you need to adjust the categorical score first and make sure that the selected numerical score is within the range for that categorical score.

Enter PAQL by selecting from the drop down list, as explained earlier in this course:

For each of the 3 factors, organizations select a Performance Appraisal Quality Level (also known as PAQL and pronounced P-qual) after assessing employees’ performance in achieving their expected contribution results.

The available values are Level 1 – Unacceptable; Level 2 – Fully Successful and Level 3 – Outstanding.

These values will be averaged to calculate the employee’s annual rating of record.

Uploading Data Back to CAS2Net

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At the end of you pay pool meeting, you need to upload your data from the CMS back into CASNet.

The next slides will review that process, which is in essence the reverse of the Import process

Acq Demo

Create Export CSV File

Compensation Management Spreadsheet

Cycle: 2018 Version: dev 23

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

Data Maintenance – All additions, deletions, and modifications must be done in the central database. All columns except for data entry and “wild-card” are locked. To preserve your work, export the data from this spreadsheet and upload to 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 payroll data.

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

Data Upload – Use Export to create a file for uploading the results from your pay pool to 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
[Import](#) [View](#) [Export](#)

Last Import: 7/24/2018 (10:55:52 AM)(COT)
 Last Export:
 Last Modified:

Parameters
[Set CRI and CA Parameters](#)

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

Scatter-plots of OCS Score by Salary
[Current Pay & 2018 SPL](#) [New Pay & 2019 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](#)

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

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After validating your data, (from the Add-ins at the top of your spreadsheet), use the CMS Content tab “export” button to initiate the export process

Save CSV File

File name: ppAMCLH to Master 7-25-2018

Save as type: Comma Delimited

Authors: Dancy, Danielle

Tags: Add a tag

Save Cancel

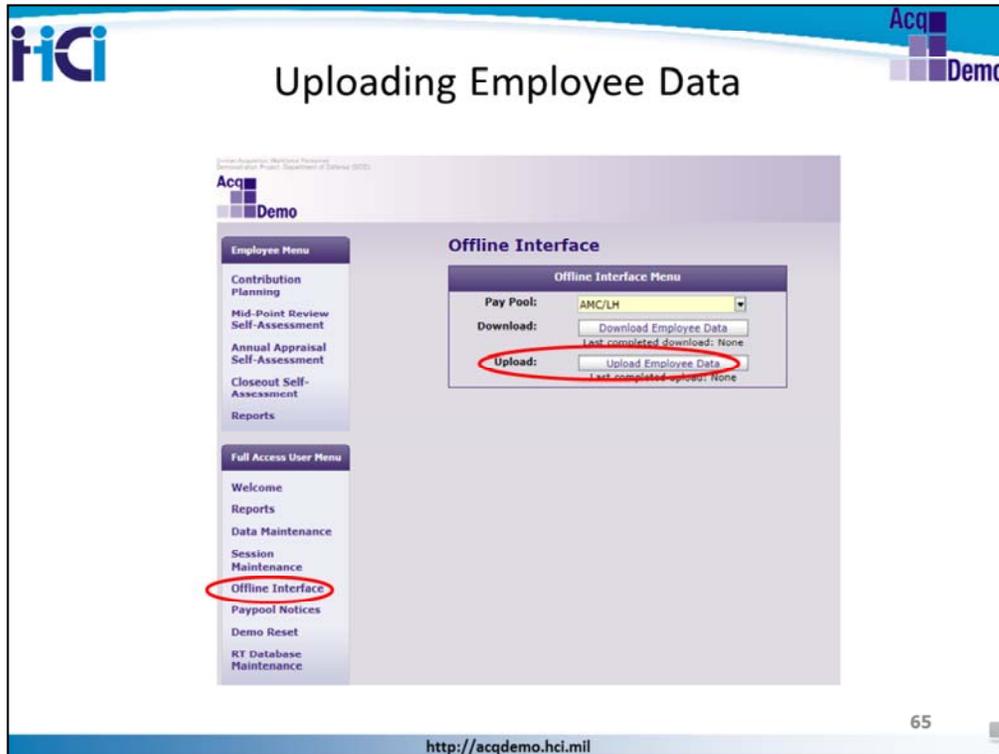
- Save the CSV file in a protected folder
- Note: CMS Spreadsheet applies built-in naming convention functionality to generate filename

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The Export function will generate an Export text file that you will need to save onto your computer, in the same folder where your CMS is saved.

The Export function also assigns the filename, generated based on the naming convention for an export file (in this case, the file will show “to Master” in its name)



To upload your export file to CAS2Net, login to CAS2Net and click on “Offline Interface

Look for the “upload” button and click on “Upload Employee data”

Upload to CAS2Net

Offline Interface - Upload Employee Data

Upload Form

Specify AMC/LH upload file:

Command:

Employee Menu

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

Full Access User Menu

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

Select saved CSV file and Upload to complete the process

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At this point, you will need to specify the location of your export file, on your computer.

Click on “Browse” and select your saved Export file (the one that shows “to Master” in the filename)

Acq Demo

Pay Pool Meeting: Part I Form

Compensation Management Spreadsheet

Cycle: 2018 Version: dev 23

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

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

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

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

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

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

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

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

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

Pay Pool Data
[Import](#) [View](#) [Export](#) Last Import: 7/24/2018 (10:55:52 AM) (CDT)
 Last Export: Last Modified:

Parameters
[Set CRI and CA Parameters](#)

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

Scatter-plots of OCS Score by Salary
[Current Pay & 2018 SPL](#) [New Pay & 2019 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.

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You can generate an Appraisal Form from the Content tab of the CMS.
 At the end of the pay pool meeting, after validation, click on Generate Part I of Appraisal Forms



Example of a Part I



Part I: CCAS Salary Appraisal Form

Name: Adam A. Appleton	Series: 1000	Appraisal Period: From: 1-Oct-17 To: anniversary
CASNet ID: 2012	Band/Level: II	Remained Pay: No
Organization: AMGL/14	Prerequisite: None	
Current Path: 001		

Approved By: Sam Statista, Pay Pool Manager Effective Date of Appraisal: January 1, 2018

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

Date _____

Supervisor Print / Sign _____ Date _____

Employee Print / Sign _____ Date _____

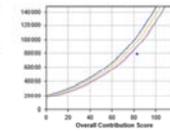
2018 Appraisal Detail	Factor	Cat Score	Num. Score	ESQL
Overall Contribution Score	83	Job Achievement and/or Innovation	3H	83
Expected Contribution Score	72	Communication and/or Teamwork	3H	83
Expected Contribution Range	68-76	Mission Support	3H	83
Delta CCS	11			
FAGL Rating of Rec'd (Full)	3			

Compensation Detail

- \$78,350 Current Rate of Base Pay
- + \$ 1,286 General Pay Increase @ 1.6%
- + \$ 4,417 CRB (Salary Increase) @ 5.67%
- = \$84,053 New Rate of Base Pay
- + \$62,284 Locality Pay @ 28.30%
- = \$146,337 New Total Salary
- \$ 1,762 Contribution Award

Employee Compensation Region Chart
Approved Compensation Region: B

The graph plots the employee's current base salary against the band/level to which the employee has just been promoted. The middle line is the job, Region A is the upper band, Region B is the lower band, Region C is the lower band, Region D is the lower band, Region E is the lower band, Region F is the lower band, Region G is the lower band, Region H is the lower band, Region I is the lower band, Region J is the lower band, Region K is the lower band, Region L is the lower band, Region M is the lower band, Region N is the lower band, Region O is the lower band, Region P is the lower band, Region Q is the lower band, Region R is the lower band, Region S is the lower band, Region T is the lower band, Region U is the lower band, Region V is the lower band, Region W is the lower band, Region X is the lower band, Region Y is the lower band, Region Z is the lower band.



2018 Expected Contribution Level

Expected Overall Contribution Score: 75
Expected Contribution Range: 71-79

Notes on Form (2018):

1. This form is a computer-generated form that is provided for each employee and contains the overall contribution score and space for the signature of the employee and the supervisor. The signature of the supervisor is not required for the form to be used.
2. This form is a computer-generated form that is provided for each employee and contains the overall contribution score and space for the signature of the employee and the supervisor. The signature of the supervisor is not required for the form to be used.
3. This form is a computer-generated form that is provided for each employee and contains the overall contribution score and space for the signature of the employee and the supervisor. The signature of the supervisor is not required for the form to be used.
4. This form is a computer-generated form that is provided for each employee and contains the overall contribution score and space for the signature of the employee and the supervisor. The signature of the supervisor is not required for the form to be used.

Remarks: Comments for Rater

Contents Adam A Appleton
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The Part I generated from the CMS is identical to the one generated in CAS2Net in Reports

By default, the CMS generates a Part I for each record of your pay pool

If you only need one or a few select records, you need to filter the list of records in the data sheet before generating the Part I from the Contents sheet

This is an example of a Part I

It can also be generated as a report from CAS2Net –

You can limit and order the selection of records by filtering and sorting the data records in the Data tab prior to generating the Part I – the CMS will only generate a Part I for those records that have not been filtered out (are displayed on the data tab).

This is important to remember because generating hundreds of Part I can take a while.

Summary Tab

To change column data click the title and make a selection from picklist on each column title.

Last Name	First Name	Career Path	Breakdown Level	Occ Rate	Locality Rate	CV2018 Base Pay	1st Level Sup Name	Rating of Record	2018 OCS	2018 OCS	2018 OCS	2018 OCS	Approved OCS	New Base Pay 2019	Final Base Pay + Locality	Total Award	CV2018 Expired OCS
Duerr	Berry	NI1	2	1515	30.57%	\$50,568	Helen Gonzalez	3	64	14	\$708	\$3,748	\$55,024	\$72,015	\$1,406	53	
Michelson	Nancy	NI1	4	0830	30.57%	\$106,788	Francis Evans	5	99	11	\$1,496	\$6,241	\$114,525	\$149,890	\$2,803	90	
Hamm	Honey	NI1	2	0830	30.57%	\$66,309	Tammy Stewart	3	65	1	\$929	\$441	\$67,679	\$88,578	\$479	64	
Taman	Timothy	NJ	3	0340	30.57%	\$67,096	Tammy Stewart	3	59	-5	\$0	\$0	\$67,096	\$87,818	\$0	63	

The summary tab offer a quick print-ready view of your pay pool results.

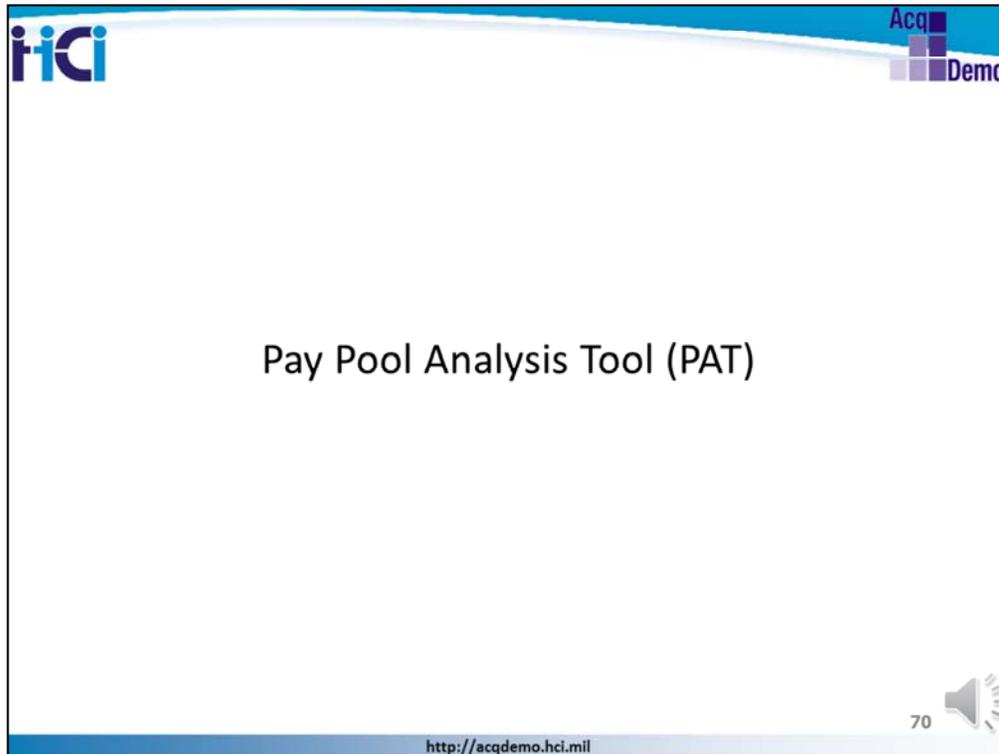
You can change the default fields by selecting another data column from the available drop down list

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The Summary tab is the last tab in the CMS

It is a ready to print summary of your pay pool results

You can tailor the headers by selecting the desired data column from the available drop down list



The Pay Pool Analysis Tool is used to combine the results of one or several pay pools (CMS) and produce analytical graphs and statistics

Pay pools can quickly generate graphs and tables that can be used in PowerPoint presentations or other reports

Pay Pool Analysis Tool (PAT)
2018.dev11
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, CFI, CA and funding.

How to use this spreadsheet:
[Import](#) one or more export files from Compensation Management Spreadsheet (CMS)

Table of Contents

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

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When you first open the PAT, you will see a long list of hot links that help you navigate the spreadsheet. Each hot link under “Table of Content” links to a tab in the PAT


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Example of Statistical Tables

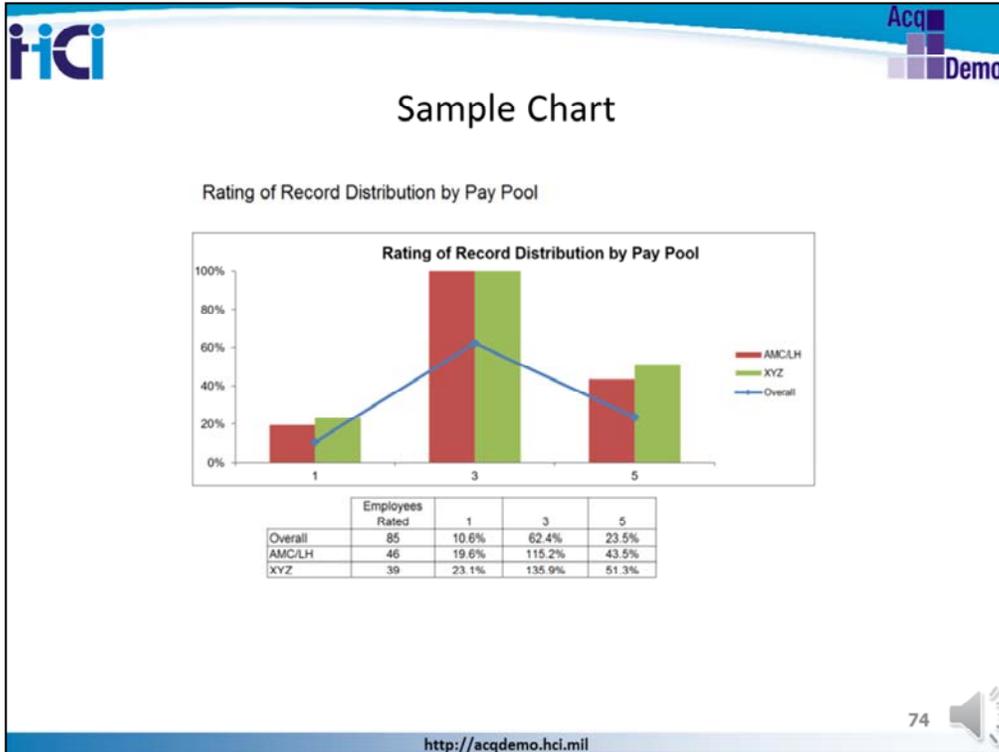
Rating Statistics
Analyzed Population does not include Presumptives Due to Time

	Overall	FY2
NH-4	87.0	87.0
NJ-1		
NJ-2		
NJ-3	51.5	51.5
NJ-4	78.7	78.7
NK-1	19.0	19.0
NK-2	39.4	39.4
NK-3	42.0	42.0
Average Delta OCS		
NH-1	1.4	1.4
NH-2		
NH-3	1.7	1.7
NH-4	1.4	1.4
NJ-1		
NJ-2		
NJ-3	2.0	2.0
NJ-4	1.0	1.0
NK-1	1.0	1.0
NK-2	1.2	1.2
NK-3	3.0	3.0

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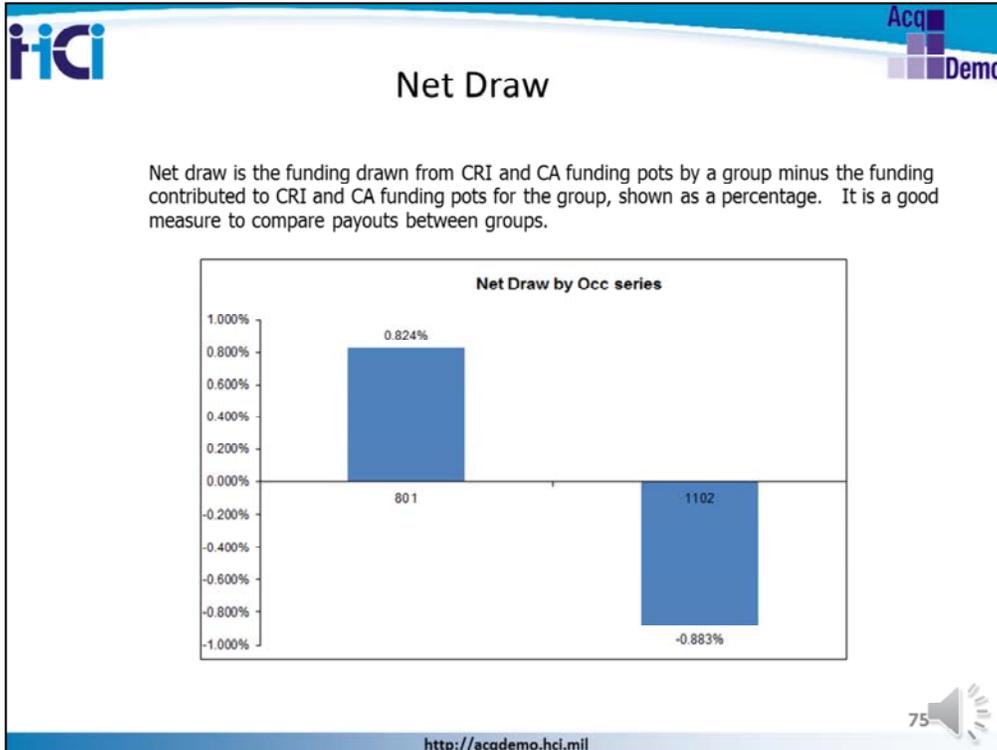
<http://acqdemo.hci.mil>

The Statistical Tables view shows statistics overall and by Pay pool. If you have several pay pools to analyze, the Overall will show the results for all your pay pools. In this case, only one pay pool is being analyzed, therefore the Overall and by Pay Pool results are identical



This is an example of a Sample Chart: Rating of Record distribution by pay pool and overall

It displays the number of employees being rated in each pay pool and shows their distribution across 3 Rating of Record levels (1, 3, and 5)



The Net Draw analysis reveals how a group has contributed funding to the pay pool and how that group drew funding from the CRI and CA funding pots.

In this example, it shows that PP801 drew more funding than it contributed (net draw is positive) – PP1102 on the other hand, drew less funding than it contributed (net draw is negative)

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Acq Demo

Creating a Briefing



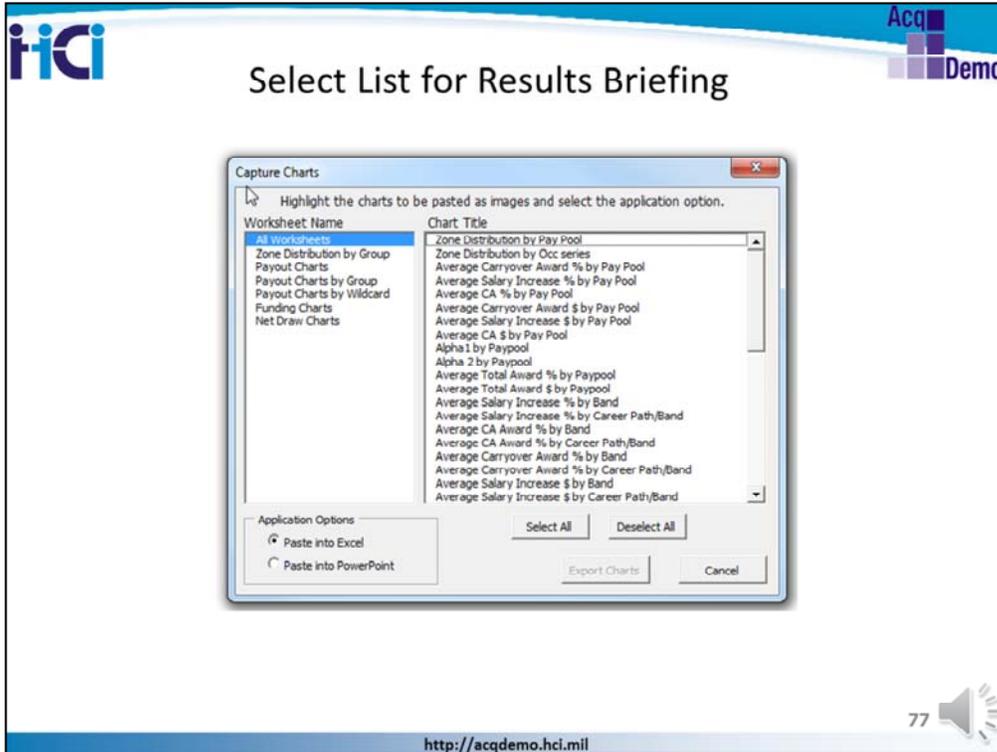
The PAT allows the organization to generate a briefing of results. Note that the PAT ensures that only pictures are captured for the briefing, thus preventing exposure of the underlying data within the spreadsheet.

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The PAT allows organizations to create briefing slides where any graph or table is a picture to protect the backup data from become visible

To create charts, click on the “output charts” button from the Add-Ins tab



The PAT offers various ways to generate the charts:

First select the worksheet that you are interested in including in your briefing.

Next, select the Chart you are interested to see being generated, for example, the “Zone Distribution by Pay Pool” chart

Select whether you want the output to be in Excel or PowerPoint, then click “export Charts”

THANK YOU