

Purpose

Introduction

HCP Pooled Positions allow users to plan fluctuating populations of employees using a single position. When selecting the Pooled Position type in HCP, many defaults are populated in the system, saving data entry time. This job aid will detail what gets system generated in the system and how to manage the defaults.

Access

CalPlanning users with Planner role access can update Pooled Position Salary Admin Plans.

Location

HCP Pooled Positions can be accessed and updated in the **HCP Planner Task List** within the **Create and Manage HCP Pooled Positions** task.

Instructions

The following pages detail:

- Default Compensation Accounts, Salary Admin Plans, Fringe Accounts and Fee Remission Rates for Pooled Positions
- Updating Pooled Position Compensation and Fringe Accounts
- Updating the Salary Admin Plan for a Pooled Position
- Running the Calculate Compensation Business Rule
- Vacation Eligibility by Salary Admin Plan

Questions

If you have any questions regarding this document, please email calplanning@berkeley.edu.

HCP Pooled Position System Defaults

When creating a new pooled position, selecting the type of position will default the Compensation Account, Fringe Account, and Salary Admin Plan as follows:

HCP Pooled Position	Comp Account	Comp Acct Desc	Fringe Account	Fringe Acct Desc	Fringe Rate FY17	Fee Remission FY17	Fringe Rate FY18	Fee Remission FY18*	Salary Admin Plan
Adjunct Professors	A50240	Acad Teach-Regular (Default) (A50240)	A53060	Benefit Assess-Academic Regular	39		40		A04
GSI	A50241	Acad Teach-Exempt from CBR (A50241)	A530XX_Stat		0	\$8,220.00	0	\$8,698.20	GSI
GSR - Non-Resident	A50211	Acad Nonteach-Exempt from CBR (A50211)	A530XX_Stat		0	\$16,378.25	0	\$16,981.20	A58
GSR - Resident	A50211	Acad Nonteach-Exempt from CBR (A50211)	A530XX_Stat		0	\$8,827.25	0	\$9,430.20	A58
Lecturer	A50240	Acad Teach-Regular (Default) (A50240)	A53060	Benefit Assess-Academic Regular	39		40		Not Defined
Per Diem	A51231	Staff-Exempt from CBR (A51231)	A530XX_Stat		0		0		PSS
Reader/Tutor - Non-student	A50241	Acad Teach-Exempt from CBR (A50241)	A530XX_Stat		0	\$8,220.00	0	\$8,698.20	Not Defined
Reader/Tutor - Student	A50241	Acad Teach-Exempt from CBR (A50241)	A530XX_Stat		0	\$8,220.00	0	\$8,698.20	Not Defined
Student Titles (Undergrad)	A51231	Staff-Exempt from CBR (A51231)	A530XX_Stat		0		0		Not Defined
Student Titles (Workstudy)	A51029	Work Study (A51029)	A530XX_Stat		0		0		Not Defined
Summer	A50212	Acad Nonteach-Limited Benefits (A50212)	A53080	Benefit Assess-Limited	17		19		Not Defined
Teacher - UNEX	A50211	Acad Nonteach-Exempt from CBR (A50211)	A530XX_Stat		0		0		BYA
Visiting Professors	A50242	Acad Teach-Limited Benefits (A50242)	A53080	Benefit Assess-Limited	17		19		BYA

*approved projection

- **Compensation Account** – The salary expense account for the position and distributions. Any compensation expense is reflected in the defaulted account.
- **Fringe Account** - Composite Benefits expense is reflected in the defaulted Fringe Account. The rate of the Fringe expense is multiplied by the compensation expense (by distribution) and charged to the expensed to the Fringe Account. View this detail in the Pooled Position Expense Detail form.
- **Fee Remission** - Graduate students who hold academic appointments (GSI, GSR, Reader, Tutor) may be eligible for fee remissions that offset a portion or all of their fees.
- **Salary Admin Plan** - Groups job codes into compensation or salary administration plans. It is representative of bargaining unit codes, and may be broken down further for non-represented staff and academics. The Salary Admin Plan is used to determine if a position is eligible to create vacation expense.

Updating Pooled Position Compensation and Fringe Accounts

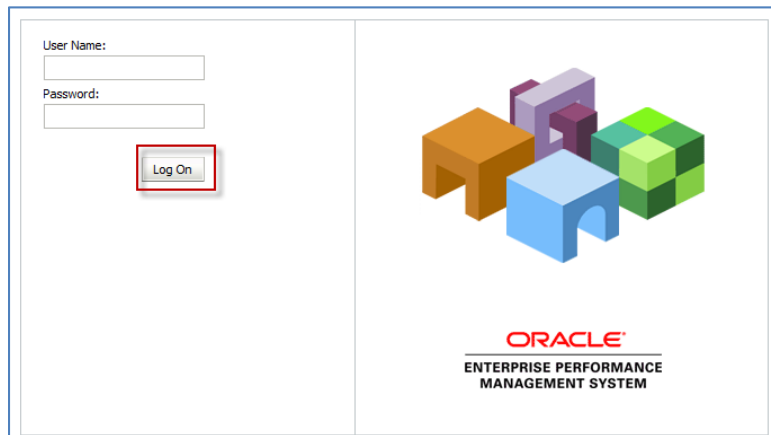
Default Compensation and Fringe Accounts for Pooled Positions cannot be updated by users. When the defaults were determined, HCP Pooled Position job codes were reviewed to find the most regularly used Compensation and Fringe Account.

Use a **Dept ID Comp Adjustment** to reflect the correct Compensation Account, when the default does not meet your needs.

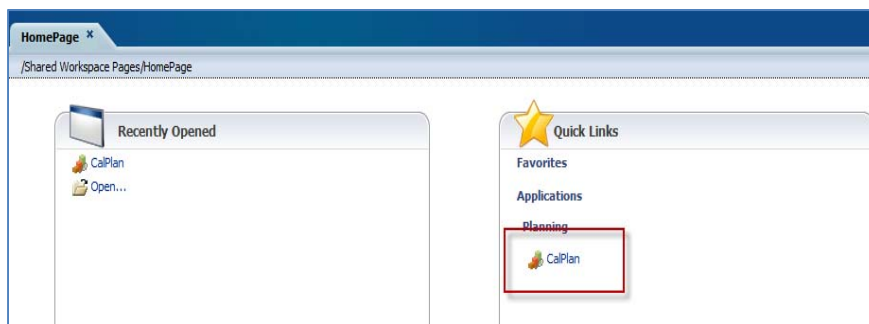


Updating Pooled Position Salary Admin Plans

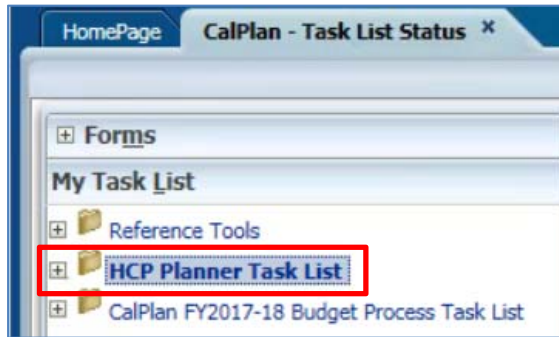
1. **Log into CalPlanning.** Access the workspace at <https://calpln-rptportal.berkeley.edu/> and log in with your CalNet ID and Password.



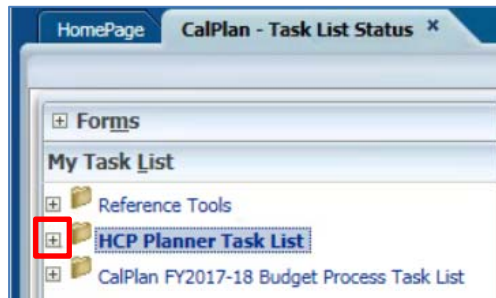
2. From the **CalPlanning HomePage**, Planners can launch the planning application by selecting **CalPlan**.



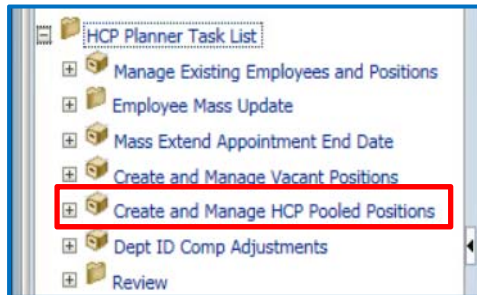
- If not already open, select the **My Task List** option in the left-hand navigation pane.



- Expand the **HCP Planner Task List** by clicking on the '+' icon.



- Click on **Create and Manage HCP Pooled Positions** to launch the form. *If the form does not launch, check that you have set your user preferences for CalPlan from the left-hand navigation pane **Preferences ->User Variables**.*



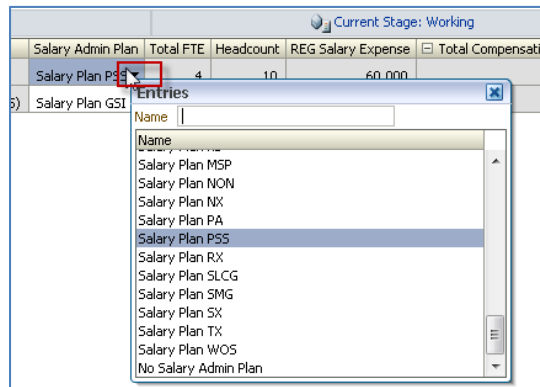
- The **HCP Pooled Positions** form will display, and include the Pooled Positions that have been created for the Entities that report to the MyOrg User Variable selected in Preferences. If the Page is blank, no Pooled Positions have been created. New Position #s represent Pooled Positions created in the current planning season. Previous Position #s are Pooled Positions created in prior planning seasons.

Task - Create and Manage HCP Pooled Positions-HCP Pooled Positions											
Task Instructions											
Manage Pooled Positions											
MyOrg: 1_VCRE5			Current Scenario: Forecast			Current Stage: Working					
	Pooled Position Type	Plan Home Dept	Position Name	Salary Account	Salary Admin Plan	Total FTE	Headcount	REG Salary Expense	Total Compensation Expense	Fee Remission Expense	
1_31010	New Position 7	Student Titles (Undergrad)	1_31010	Students Pooled	Staff-Undergraduate (A51240)	Salary Plan P55	4	10	60,000	61,110	
1_31012	New Position 4	GSI	GSI	Graduate Student-Teaching (A50235)	Salary Plan GSI	3	7	99,000	101,624	101,500	

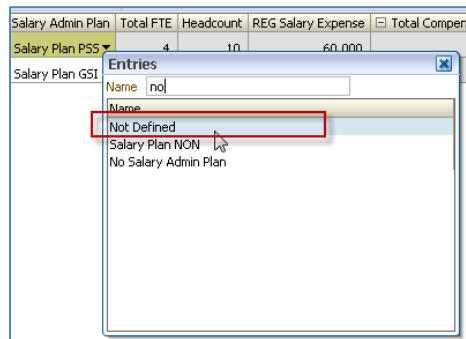
- You can update the **Salary Admin Plan** for Pooled Positions directly from this form. **Locate** a Pooled Position that you wish to update, such as a Student that was previously coded as "PSS". You may wish to update the setting of this Employee to "Not Defined".

Task - Create and Manage HCP Pooled Positions-HCP Pooled Positions											
Task Instructions											
Manage Pooled Positions											
MyOrg: 1_VCRE5											
Current Scenario: Forecast											
Current Stage: Working											
Pooled Position Type	Plan Home Dept	Position Name	Salary Account	Salary Admin Plan	Total FTE	Headcount	REG Salary Expense	Total Compensation Expense	Fee Remission Expense		
1_31010	New Position 7	Student Titles (Undergrad)	1_31010	Students Pooled	Staff-Undergraduate (A51240)	Salary Plan PSS	4	10	60,000	61,110	
1_31012	New Position 4	GSI	GSI	GSI	Graduate Student-Teaching (A50235)	Salary Plan GSI	3	7	99,000	101,624	101,500

- Click on the **arrow** next to the Salary Admin Plan to review the list of available **Salary Admin Plans**.




- Begin typing **Not Defined** in the text field to use the text sensitive search options. You do not need to type the entire name to locate the Salary Admin Plan. Once located click on **Not Defined**.

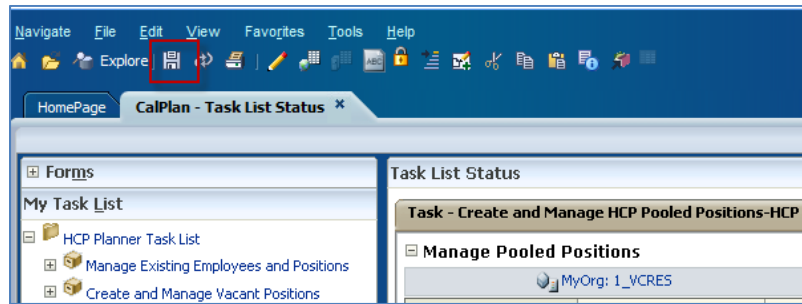


- Not Defined** will populate in the form and the field will highlight in yellow. This is an indication that a change has been made and must be saved.

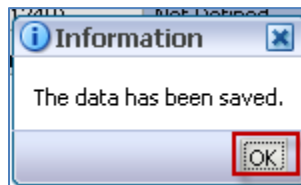
Task - Create and Manage HCP Pooled Positions-HCP Pooled Positions											
Task Instructions											
Manage Pooled Positions											
MyOrg: 1_VCRE5											
Current Scenario: Forecast											
Current Stage: Working											
Pooled Position Type	Plan Home Dept	Position Name	Salary Account	Salary Admin Plan	Total FTE	Headcount	REG Salary Expense	Total Compensation Expense	Fee Remission Expense		
1_31010	New Position 7	Student Titles (Undergrad)	1_31010	Students Pooled	Staff-Undergraduate (A51240)	Not Defined	4	10	60,000	61,110	
1_31012	New Position 4	GSI	GSI	GSI	Graduate Student-Teaching (A50235)	Salary Plan GSI	3	7	99,000	101,624	101,500

NOTE: If you prefer not to search, or have multiple updates, you can copy and paste into the cell.

11. Click on the **Save** icon  located at the top of the page to save the changes to any Salary Admin Plans.



12. A confirmation window will display confirming that the save action is complete. Click **OK**.

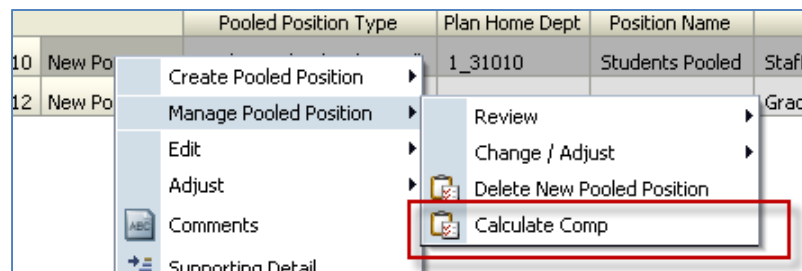


13. The cell now displays 'Not Defined' and has returned to white. However, the Compensation Totals do not reflect the removal of Vacation Expense.

Task - Create and Manage HCP Pooled Positions-HCP Pooled Positions											
Task Instructions											
MyOrg: 1_VCRE5											
Current Scenario: Forecast											
Current Stage: Working											
	Pooled Position Type	Plan Home Dept	Position Name	Salary Account	Salary Admin Plan	Total FTE	Headcount	REG Salary Expense	Total Compensation Expense	Fee Remission Expense	
1_31010	New Position 7	Student Titles (Undergrad)	1_31010	Students Pooled	Staff-Undergraduate (A51240)	Not Defined	4	10	60,000	61,110	
1_31012	New Position 4	GSI	GSI	Graduate Student-Teaching (A50235)	Salary Plan GSI	3	7	99,000	101,624	101,500	

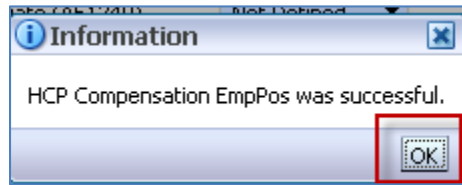
Running the Calculate Compensation Business Rule

14. In order to refresh the Compensation Expense Totals to reflect the removal of Vacation Expense, right-click on the **Position Number** cell and select **Manage Pooled Position > Calculate Comp.**

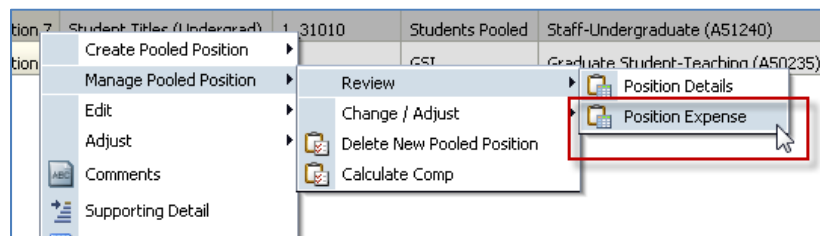


Note: This Calculation is specific to this position and should be run for each position updated.

15. A confirmation window will display. Click **OK**.



16. You may review the Total Compensation Expense directly from this form, or can navigate to review Pooled Position Expense by right-clicking on the position number and selecting **Manage Pooled Position > Review > Position Expense**.



17. The **Distributed Compensation Expense** form will display. Note the removal of the **Net Vacation Accrual**.

Task - Create and Manage HCP Pooled Positions-HCP Pooled Positions																	
HCP Pooled Positions > HCP Pooled Review Expense																	
Review Pooled Position Distributed Compensation Expense																	
Distributed Compensation Expense Distributions By Month																	
Entity: 1_31010 - AMCAS General Ops					Position: New Position 7					Employee: Pooled Employee							
Current Year of View: FY13																	
	YearTotal	July	August	September	Quarter 1	October	November	December	Quarter 2	January	February	March	Quarter 3	April	May	June	Quarter 4
REG Salary Expense	60,000	5,000	5,000	5,000	15,000	5,000	5,000	5,000	15,000	5,000	5,000	5,000	15,000	5,000	5,000	5,000	15,000
Summer Salary Expense																	
Additional Earnings Expense																	
Fringe	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Net Vacation Accrual																	
GACL Expense	510	43	43	43	128	43	43	43	128	43	43	43	128	43	43	43	128
Total Compensation Expense	60,510	5,043	5,043	5,043	15,128	5,043	5,043	5,043	15,128	5,043	5,043	5,043	15,128	5,043	5,043	5,043	15,128
Fee Remission Expense																	

Salary Admin Plan Vacation Eligibility

HCP Vacation Eligibility - Salary Admin Plans Defaults		
Salary Plan	Description	Vacation Eligible
A02	Ladder Ranks-Academic Year	No
A04	Ladder Ranks-Fiscal Year	Yes
A06	Ladder Ranks-Acad Year-BME	No
A08	Ladder Ranks-Fiscal Year-BME	Yes
A14	Ladder Ranks-Acad Year-Law	No
A24	Ladder Ranks-Acting-Acad Year	No
A26	Ladder Ranks-Acting-Fiscal Yea	Yes
A28	Ladder Ranks-Acting-Acad Yr-BM	No
A30	Ladder Ranks-Acting-Fis Yr-BME	Yes
A38	Supervisor of PE-Academic Year	No
A40	Academic Standard Table	No
A43	Unit 18-Academic Standard Tabl	No
A44	Lecturer SOE-Standard Table	No
A50	NonSen Instr BU-Supvr Teach Ed	Yes
A57	Grad Student Asst Researcher	No
A58	Graduate Student Researcher	No
A68	Military Assistant	No
A74	Librarian-Uncovered	Yes
A75	Librarian-Covered	Yes
A76	Asst/Assoc Univ Librarian	Yes
A80	Coop Extension Advisor	Yes
A82	Coord Pub Prog/Cont Ed Spec	Yes
A89	Field Program Supervisor	No
A90	Professional Researcher-Acad Y	No
A91	Professional Researcher-Fiscal	Yes
A92	Professional Researcher-BME-AY	No
A93	Professional Researcher-BME-FY	Yes
A94	Specialist in Coop Extension	Yes
A95	Project Scientist	Yes
A96	Project Scientist-BME	Yes
A99	Deans	Yes
AHA	Acad Housing Allowance	No
BXR	Reader-Berkeley	No
BXT	Tutor-Berkeley	No
BYA	By-Agreement Titles	No
CX	Clerical Unit	Yes
EX	Patient Care Technical Unit	Yes
GS	Printing Trades Unit	Yes
GSI	Graduate Student Instructor	No
HX	Hospital Residual Profess Unit	Yes
KB	Skilled Crafts Unit	Yes
MSP	Manager & Senior Prof	Yes
NON	Non-Employee	No
NX	Registered Nurses Unit	Yes
PA	Police Officers Unit	Yes
PSS	PSS - Non-Rep (99 and XXUnc)	Yes, with exception of Undergrad Students
RX	Research Barg Unit	Yes
SLCG	Senior Leadership Comp Group	Yes
SMG	Senior Management Group	Yes
SX	Service Unit	Yes
TX	Technical Unit	Yes
WOS	Without Salary	No