

Overview

Introduction

CalPlanning HCP (Human Capital Management) data was refreshed from HCM data. This job aid provides some basic information to assist in the understanding of where data might be different. We highly recommend planners also take the HCP Key Concepts class to more fully understand the material.

Content Overview

This Job Aid will outline some potential differences in the way the data is represented in HCP vs. HCM and explain how to fix them where appropriate.

The examples in this Job Aid include:

- Scenario A: Employee is Missing from My HCP Data
- Scenario B: I See an Employee in My HCP Data Who is Not Mine
- Scenario C: HCP Employee Salaries are Slightly Off

Questions

If you have any questions, please email calplanhelp@berkeley.edu.

Scenario A: Employee is Missing from My HCP Data

A few possible explanations:

1. HCP Security provides specific 'Org' or DeptID access to employee data for planners as requested by their LIMs. HCP data is organized and access limited by use of a field we have called "Planning Home Dept" (PHD). Planning Home Dept data comes from the HCM position table in the field called "Level 7 Department." The HCP data includes the latest "Level 7 Department" data prior to 10/24/14. This field may differ from the DeptID where costing may be charged. If a change needs to be made to HCP Planning Home Dept, there needs to be consensus between the unit wanting the change and the unit where the PHD currently is. If there is agreement, units can then open a ticket through the helpdesk requesting this change.

Further information on how to find a missing person that should be planned for individually is available on the CalPlanning website in a Job Aid on Managing Budgets Through HCP001 Report and Planning Home Dept Lookup: http://calplanning.berkeley.edu/sites/default/files/hcp_-_managing_budgets_through_hcp001_report_and_planninghomedepartment_lookup_final.pdf

2. Employee may be pooled. If so, you will not see the individuals brought into HCP. A Job Aid of which title codes were brought in can be found at: http://calplanning.berkeley.edu/sites/default/files/HCPPooledpositionjobaid_022713a.pdf

3. HCP only brings in REG, RG1, PRT, SLN, SLR distribution salary rows. If an employee is paid from a different salary distribution type, the data will not exist in HCP.

Scenario B: I See an Employee in My HCP Data Who is Not Mine

Explanation:

Please see "Scenario A" above.

Scenario C: My HCP Employee Salaries Are Slightly Off

Explanation:

1. HCM Job FTE not equal to Distribution FTE

Problem:

HCP requires that the distribution percentage be a weighting that adds up to 100. The HCM to HCP conversion program does this by taking the distribution % and dividing by the job FTE. When the sum of distribution percent does not equal job FTE, distribution percentages will not add to 100% and HCP salary calculations will be different than expected.

2. 10 month salaries paid over 12 months in HCP

One of the enhancements of the FY15– FY16 Budget cycle is that 10 Month Academic Salaries are now spread over 12 months. HCM and HCP monthly salaries now match for employees with '1/10' in the job code description.

For Academic positions with job codes that contain "1/10" in the title of the job code, the 10 month salary pulled from HCM is divided by 10 to get the monthly rate. This amount is multiplied by 12 to produce a 12 month salary with a monthly rate that matches the monthly rate in HCM.

	Annual Rate	Monthly Rate	Months Paid	Total Annual Salary
HCM Salary	\$30,000	\$3,000 Annual/10	5	\$15,000
Former HCP Salary	\$30,000	\$2,500 Annual/12	5	\$12,500
Current HCP Salary	\$36,000 HCP Annual *12/10	\$3,000 Annual/12	5	\$15,000

3. Non-100% funding allocation

Most often, it is because the distribution is off by a few decimal points compared to job FTE. Sometimes, the numbers are quite different. There are also cases where there is a future FTE change accounted for in the distribution that is not accounted for in the job FTE. The example below illustrates this point.

Screenshot from HCM

EMP ID: Empl Rcd #: 0

Earnings Distribution Type Find First 1 of 3

Effective Date: 07/01/2013 Effective Sequence: 2 Job Category: Principal
 Action: Erns Dist Reason: Distribution

Standard Hours: 21.20 Work Period: W Weekly
 Pay Rate/Amount: Comp Freq: M Monthly
 FTE: 0.530000

Job Earnings Distribution Find First 1 of 1 Last

Begin Date	End Date	Earn Code	Regular	Distrb %	Pay Rate/Amount
07/01/2013		REG	Regular	53.3300	
Budgeted FTE	Work Study Program				Special Type: GI RII

0.530000 x 100 = 53.0000 FTE

53.0000 FTE not equal to 53.3300 distrib %

53.3300 distrib % / 53.0000 FTE = 100.62 HCP Distribution Percentage

Earnings Chartfields
 Account: 50240
 Acad Teach-Regular

Screenshot from HCP

HCP Employee Position > HCP Empl Review Details

Employee Detail

Scenario: Forecast Entity: 1_11984 - CLLAW JD Instr Lects in Res Version: Working Employee: Position:

Current Year of View: FY14

Empl Profile Empl REG Pay Empl Oth Earnings Empl FTE Empl Status Empl By Period **Empl Distributions**

	Distribution Account Desc	Distribution Entity Desc	Distribution Fund Desc	Distribution Chart1 Desc	Distribution Start Date	Distribution End Date	Distribution Percentage
1st Distribution	50240 - Acad Teach-Regular (Default)	1_11975 - CLLAW JD Instr Lecturers	20225 - PD Supp Tuition - Law	C1 - Summary - Plan	7/01/2013	12/31/2099	100.62

4. Leave of Absence (LOA)

HCP requires that planners enter LOA data into HCP manually. Timing and lack of reliable ‘return from leave’ data in HCM was behind the design decision to not import LOA data to HCP. For reference, the “Manage Employee and Position” screen displays as ‘Leave’ status when appropriate, but this does not impact calculations.

5. Oracle issues that may cause Employee Salary Expense to calculate slightly incorrectly in HCP

- a. When FTE, Salary, or Distributions begin and end in a 31 day month
- b. When an employee’s beginning or end dates are in the middle of a month.

These are issues that Oracle needs to fix in their delivered calculation rules.

Below are screenshots from HCP that show that July and August are overstated because distributions begin and end within the month.

When that happens, the calculation rule works like this:

End date – begin date / 30 * FTE * Salary.

So for a 31 day month, the calculation erroneously results in over calculating by one day of pay.

A workaround might be to change the end dates to be on the 30th day. Or to put in a negative additional pay or negative dept ID adjustment equivalent to the over calculated expense.

HCP Salary Expense

Entity: Position:

Current Year of View: FY14

	YearTotal	July	August	September	Quarter 1	October	November	December	Quarter 2	January	February	March
REG Salary Expense	119,131	10,202	10,202	9,873	30,276	9,873	9,873	9,873	29,618	9,873	9,873	9,873

HCP Empl Distributions

Scenario: Forecast Entity: Version: Working

Current Year of View: FY14

Empl Profile Empl REG Pay Empl Oth Earnings Empl FTE Empl Status Empl By Period **Empl Distributions**

	Distribution Account Desc	Distribution Entity Desc	Distribution Fund Desc	Distribution Chart1 Desc	Distribution Start Date	Distribution End Date	Distribution Percentage
1st Distribution	51210 - Staff-Regular (Default)	05397 - EDUCATIONAL FUNDS			7/01/2013	7/31/2013	100
2nd Distribution	51210 - Staff-Regular (Default)	05397 - EDUCATIONAL FUNDS			8/01/2013	8/31/2013	100
3rd Distribution	51210 - Staff-Regular (Default)	19900 - GENERAL FUNDS			9/01/2013	9/30/2013	100
4th Distribution	51210 - Staff-Regular (Default)	19900 - GENERAL FUNDS			10/01/2013	12/31/2099	100

Below are screenshots that show an employee starting mid-month, on 7/25/2013, and the under- statement of the employee’s calculated compensation expense. The CalPlanning team needs to examine the issue further to determine how HCP is calculating in these cases.

HCP Distributed Compensation Expense

Review Employee Position Distributed Compensation I

Distributed Compensation Expense		Distributions By Month		
Entity: 1_26				
Current Year of View: FY14				
	YearTotal	July	August	September
REG Salary Expense	74,980	272	6,792	6,792

HCP Empl Distributions

Employee Detail								
Scenario: Forecast		Entity: 1_26		Version: Working		Employee:		Pos:
Current Year of View: FY14								
Empl Profile	Empl REG Pay	Empl Oth Earnings	Empl FTE	Empl Status	Empl By Period	Empl Distributions		
	Distribution Account Desc	Distribution Entity Desc	Distribution Fund Desc	Distribution Chart1 Desc	Distribution Start Date	Distribution End Date	Distribution Percentage	
1st Distribution	51210 - Staff-Regular (Default)	1_26370 - JNWWS Production Control	19900 - GENERAL FUNDS	C1 - Summary - Plan	7/25/2013	12/31/2099	50	
2nd Distribution	51210 - Staff-Regular (Default)	1_26370 - JNWWS Production Control	65900 - CAMPUS FUND	C1 - PPSRPL - PPS Replacement Project Costs	7/25/2013	12/31/2099	50	