Introduction

To support analysis of the Full Time Equivalent (FTE) levels of our campus workforce, monthly actual percent time worked from the Payroll Personnel System (PPS) is loaded on a monthly basis into Human Capital Planning Reporting (HCPRptg), and can be viewed at the year total level in the HCPRptg: HCP003 Job Code Trend by Actual Payroll $ and FTE Report. Historical FTE data is available as of FY2011-12.

Sample HCP003: Job Code Trend by Actual Payroll Dollars and FTE Report

![Table of Job Code Trend by Actual Payroll $ and FTE](chart.png)
How to Use HCP003

Use the HCP003 to compare the 5-year trend for the Payroll dollars and FTE amounts within your organization by Job Code. This report answers the question: “What is your unit’s relative cost among various types of jobs over the past 5 years, e.g., shifts among professorial ranks (assistant, associate, professor) ?”

For the Entity and Fund level chosen in the point of view, this report displays the HR Census Job Code Hierarchy in the rows. The hierarchy is drillable from the highest level, Job Family Description, to the individual Job Code Number. Pooled Positions are included in the report and are identified by the Pool Position Type name followed by (JC), [e.g. Summer Salary (JC), Lecturer (JC), etc.]

The columns include both Actual Payroll $’s and Payroll FTE for the last 5 closed Fiscal Years for each level of the Job Code hierarchy displayed. The last 2 columns include the percent change for $s and FTE from FY12 to FY16. The percent change is calculated using compound annual growth rate (CAGR) to better represent the year-over-year growth over several years.

HCP003 Report Metrics

$ = Actual Payroll Dollars (= Actual Salaries_And_Wages Account in HCP)

- **Definition:** Actual Payroll $ represents the actual dollars paid to all employees in a month and includes dollar amounts from BFS journals. This metric matches the BAIRS GL Detail and GL Summary reports.
- **Calculation:** Sum of Actual dollar amounts from the BFS General Ledger (payroll transactions and BFS journals).
- **Source & Timing:** BFS loaded monthly to CalPlanning.

FTE = Actual Payroll FTE

- **Definition:** Actual Payroll FTE reflects the number of total hours worked, divided by the maximum number of compensable or working hours in a full-time schedule.
- **Calculation:** Actual Payroll FTE calculates the FTE for employees based on hours worked (non-exempt employees) or percent time (exempt employees).
- **Source & Timing:** Payroll Personnel System (PPS) loaded monthly to CalPlanning.

5-YR CAGR (Compound Annual Growth Rate)

- **Definition:** The CAGR is the mean annual growth rate over a period of time longer than one year.
- **Calculation:** \[ \left( \frac{\text{FTE in the most recent year}}{\text{FTE in the earliest year}} \right)^{ \frac{1}{\text{number of periods}}} - 1 \]
  
  **Example:** \[ \left( \frac{\text{FTE in FY15}}{\text{FTE in FY11}} \right)^{ \frac{1}{4}} - 1 \]. This report includes a 5 year CAGR to calculate the mean 5-year growth over the 4 periods.

Job Code

- **Definition:** Job Codes are established by Human Resources to identify particular roles.
- **For job code details, see the Cal Answers Campus Workforce Planning Wiki.**
- **Unknown Jobs & BFS Journals** consist of BFS Journals (which do not have job codes attached), old job codes from before the implementation of Career Tracks (formerly known as Career Compass), and invalid job codes.
- **Source & Timing:** Human Capital Management (HCM)
HCP003 Report Considerations

When reviewing the HCP003 report, it is important to note:

- For FTE, only Regular (including sabbatical) and Overtime Earn Code values are included.
- The Job Codes planned in the 13 HCP Pooled Position types display a suffix, JC on this report.
- **By Agreement (BYA/BYN)** title codes are not included in this report because PPS does not store their hours or percent time worked.
- Retroactive pay actions are included and may inflate or understate the FTE data in a given accounting period.
- The HCP planned FTE for Forecast and Operating Budget are not displayed on this report as the HCP planned FTE values are mapped to the Planned Home DeptID (PHD) and not the distributed entity on which unit is paying. This limits the ability to compare the planned FTE values and the actual FTE included in this report.

Additional Resources

- Review the **CalPlanning Report Exercise Packet** for step-by-step instructions on how to run, export, save and print reports.
- Check out the **Roadmap of Campus Employee Data Systems & Reporting Tools** job aid on the CalPlanning website for a more graphical representation of connections among the various campus data systems and reporting tools that feature employee information.

Questions

For questions on CalPlan, CalRptg, HCP, HCPRptg, and Smart View, contact the CSS Help Desk (available Mon-Fri 8am to 5pm PST):

- Call (510) 664-9000 option 1 (for IT), then 2 (for CalPlanning), or
- Email calplanhelp@berkeley.edu