Budget Process Tools: Creating a Compensation Plan in Human Capital Planning (HCP) FY2016-17

CalPlan

HCP (Human Capital Planning)

CalRptg

HCP Rptg

Smart View

February 11, 2016
Learning Objectives

- Review Compensation planning goals
- Define **Human Capital Planning (HCP) & HCPRptg** tools & key compensation planning concepts
- Review the flow and timing of data in and out of HCP
- Practice basic navigating in the HCP module while
  - Managing existing employee and position data
  - Vacant Positions
  - Planning pooled positions
  - Entering DeptID compensation adjustments
- Identify where to go for additional information and support
Budget Process Calendar on bConnected

Follow these steps to display the NEW Budget Process calendar within your bConnected calendar

1. From your bConnected calendar navigate to the left frame
2. Type Budget_Process to locate “Budget_Process Departmental” <budget_process@Berkeley.edu>
3. Click on the link to display the calendar in your list of Other calendars
4. Select the Budget Process Calendar when you would like to review upcoming Budget related events relevant to CalPlanning Community Members within your calendar
Agenda

1. Introduction to Compensation Planning and Human Capital Planning
2. Key HCP Concepts
3. Understanding my Employee and Position Data
4. Managing Existing Employees and Positions
5. Mass Extending Appointment End Dates
6. Planning for a New Position with a To Be Hired Employee
7. Planning Pooled Positions
8. Planning Compensation Expenses at the DeptID
9. Post Training Support
Components of a Compensation Plan

Compensation can represent up to 85% of a unit’s total budget making compensation planning a critical part of your budget.

- **Employees**
  - Actual
  - To Be Hired

- **Positions**
  - Filled / Vacant
  - Single
  - Shared
  - Pooled

- **Compensation**
  - Salaries
  - Benefits
  - Full Time Equivalent (FTE)

Create a FY Compensation plan by month of salary, benefits and FTE for all staff, faculty and student workers in your unit to support your unit’s strategic plan.
Compensation Planning Considerations

- How do your unit’s strategies impact your staffing plans?
- What was the state of my HCM data before the copy on 1/24/16? *Did all of my HR adjustments get entered into HCM by CSS?*
- What employee changes are not reflected in the HCM data? *Are they material to my plans?*
  - Changes to Salary, Benefits, Full Time Equivalent (FTE) and Status
- What compensation changes for the remainder of FY16 and FY17 are not incorporated into my current Forecast and Operating Budget? *Do I need to make any adjustments to my Pooled Positions and/or DeptID Adjustments? Do I need to create a Lecturer Pooled Position?*
- Does my compensation plan align budgeted resources to agreed-upon changes by
  - Entity – Account -- Fund Type
- What is the explanation for the current variance in my FY16 Forecast Working Compensation Expenses to my
  - FY16 Actuals Final YTD
  - FY16 Operating Budget Final
  - FY15 Actuals Final
Human Capital Planning (HCP)

**Human Capital Planning** allows planners to

- Create next year’s **Operating Budget** for Compensation Expenses using **Employee** and **Position** data from our HR system, Human Capital Management (HCM)
- Revise your current year Compensation Forecast by reviewing Actuals to date and impacts of strategy changes, allowing us to align our resources in year.
  - Plan for future changes to calculate impact to employee and position budget data
  - Plan for future hires plus additional compensation expense by DeptID
  - Manage distributed expenses at the employee and position level
  - Review auto-calculated expenses based on accurate Fringe, Vacation, GAEL, and Fee Remission rates
HCP Rptg Tool

Pre-defined or canned reporting module with Point of View (POV) member selection options to create user defined reports.

- Use to view Human Capital Planning (HCP) compensation plan data for future year Operating Budgets, in year Forecasts and Actuals
- Provides visibility to both employee level and summarize data
- Source Systems: Personnel Payroll System (PPS) for monthly actuals, EDW for saved Plan data
Flow and Timing In Our Financial Landscape

**BFS/BAIRS**

- BAIRS: Berkeley Administrative Initiative Reporting System
- BFS: Berkeley Financial System

**CALPLANNING**

- CalPlan
- CalRptg
- Smart View

**HR**

- HCP: Human Capital Planning
- HCP Rptg
- PPS: Payroll Personnel System

*CalPlanning data push time is every three hours starting at 9:00am to 9:00pm. Check [http://budget.berkeley.edu/systems/calplanning](http://budget.berkeley.edu/systems/calplanning) for the current data push schedule.*
CalPlanning Application User Flow

**HCP (Human Capital Planning)**
Review and edit planned Compensation Expenses for **Employee and Position**.

**CalPlan**
Review and edit plan for **Revenue, Transfers, and Non-Comp Expenses** and view summarized Compensation Expense plans from HCP.

**CalRptg**
Generate and review reports of budget data from CalPlan and detailed Actuals from BFS.

**HCP Rptg**
Generate and review Compensation Expense reports for budget data from HCP by **Employee and Position**.
## Agenda

1. Introduction to Compensation Planning and Human Capital Planning
2. **Key HCP Concepts**
3. Understanding my Employee and Position Data
4. Managing Existing Employees and Positions
5. Mass Extending Appointment End Dates
6. Planning for a New Position with a To Be Hired Employee
7. Planning Pooled Positions
8. Planning Compensation Expenses at the DeptID
9. Post Training Support
Dimensions define how data is organized within CalPlanning.

**Dimensions** are made up of members.

**Members** represent an item at any level within a Dimension.
## Dimensions in HCP

<table>
<thead>
<tr>
<th>Scenario, Version, Period, Year</th>
<th>• CalPlan Application includes the current planning cycle for HCP (FY 16 Forecast and FY 17 Op Budget)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account</td>
<td>• FY 16 Compensation and Fringe Accounts</td>
</tr>
<tr>
<td>Entity</td>
<td>• Entity Hierarchy reflects the latest from BFS Master Org Tree as of December 2015</td>
</tr>
<tr>
<td>Fund</td>
<td>• Subset of individual Funds* identified for Planning</td>
</tr>
<tr>
<td></td>
<td>• HCM distributions that included Funds not identified for Planning are mapped to <strong>Plan Only Funds</strong> in HCP</td>
</tr>
<tr>
<td>Chart1</td>
<td>• Subset of individual Chart1s** identified for Planning</td>
</tr>
<tr>
<td></td>
<td>• HCM distributions that included Chart1’s not identified for Planning are mapped to <strong>C1_Summary_Plan</strong> in HCP</td>
</tr>
</tbody>
</table>
**Editable Scenario and Version in HCP and CalPlan**

**Scenario** is used to differentiate between the different types of financial plan and historical data.

**Versions** intersect Scenario to allow for snap-shots and comparisons of multiple iterations of financial data in a planning cycle.

<table>
<thead>
<tr>
<th>Scenario</th>
<th>Forecast</th>
<th>Operating Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td>Year</td>
<td>FY 16</td>
<td>FY 17</td>
</tr>
<tr>
<td>Version</td>
<td>Working</td>
<td>Working</td>
</tr>
<tr>
<td>Description</td>
<td>Editable version of the plan for the current fiscal year</td>
<td>Editable version of the plan for the future fiscal year</td>
</tr>
<tr>
<td>Date Available</td>
<td>2/05/16</td>
<td>2/05/16</td>
</tr>
<tr>
<td>Due</td>
<td>4/05/15</td>
<td>4/05/16</td>
</tr>
</tbody>
</table>

*
Employee

- Represents the employee/person.
- Existing employees were fed from HCM along with their Employee ID
- The member name for existing employees = “E” + Employee ID
- Plans for new employees can be created in HCP to reflect their compensation $s in your budget
HCP Position Dimension

Position

- Represents the job.
- Position name for existing positions = “P” + HCM Position ID#
- **Filled Position** = a position with an associated employee
- **Vacant Position** = a position with no associated employee
- **HCM Position Number** = uniquely associated with a Position. Sourced from HCM for existing positions.
Position

- **Headcount**: The number of employees associated with a position. In eligible pooled positions, the headcount is used in calculating Fee Remissions.

- **FTE**: Full Time Equivalent. The portion of full time employment budgeted for an employee. FTE is used to calculate annualized salaries in HCP.

- **Position Types**:
  1. Single Incumbent
  2. Shared Positions
  3. Pooled Positions
## HCP Position Types

<table>
<thead>
<tr>
<th>Position Types</th>
<th># Employees</th>
<th># Positions</th>
<th>Employee Details</th>
<th>FTE</th>
<th>Headcount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Single</td>
<td>1</td>
<td>1</td>
<td>Yes</td>
<td>&lt; /or = 1</td>
<td>1</td>
</tr>
<tr>
<td>Shared</td>
<td>&gt;1</td>
<td>1</td>
<td>Yes</td>
<td>Set by HR in HCM</td>
<td>&gt;1</td>
</tr>
<tr>
<td>Pooled</td>
<td>Planner Defined</td>
<td>1</td>
<td>No</td>
<td>Total Combined</td>
<td>Planner Defined</td>
</tr>
</tbody>
</table>

- **Single** and **Shared** employee types are captured in annual HCM Snapshot
- **Pooled Positions** created by Planners in FY15 were maintained with HCM refresh and must be updated or new ones created as needed
# Key Concepts – Employee FTE and Distributions in HCP

<table>
<thead>
<tr>
<th>Employee FTE</th>
<th>Employee Distributions</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Definition:</strong> The portion of full time employment budgeted for an employee. FTE is used to calculate annualized salaries in HCP.</td>
<td>The chart string associated with a planned expense in HCP. Multiple distributions can be associated with an employee, for example, when an employee is split costed or shared between departments.</td>
</tr>
<tr>
<td><strong>Constraints:</strong> Per employee, more than 0.0 but not more than 1.0.</td>
<td>The sum of all distributions must equal 100%. If there is only 1 distribution, it must be 100%.</td>
</tr>
</tbody>
</table>

## Examples

**Employee 1**
Bob has an FTE of 0.75. He has one distribution of 100%.

**Employee 2**
Sheri has a total FTE of 1.0 and works for three different units. She has three distributions: 50%, 25%, and 25%.

**Employee 3**
John has an FTE of 0.50 and works for two units. He has two distributions of 50% and 50%.
Planned Compensation Expense – the Calculation

HCP calculates planned Compensation Expense when a Position is associated with an Employee.

Compensation Expense is dispersed to Entity, Accounts, Funds, and Chart1’s using distributions.

<table>
<thead>
<tr>
<th>REG Pay</th>
<th>December</th>
<th>1st Distribution</th>
<th>Distribution Account</th>
<th>Distribution Entity</th>
<th>Distribution Fund</th>
<th>Distribution Chart1</th>
<th>Distribution Percentage</th>
<th>Distribution Amt</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fringe Element</td>
<td>December</td>
<td>1st Distribution</td>
<td>A53020</td>
<td>1_11997</td>
<td>20261</td>
<td>C1_SUMPLN</td>
<td>100</td>
<td>7,458.33</td>
</tr>
<tr>
<td>Vacation Element</td>
<td>December</td>
<td>1st Distribution</td>
<td>A520XX_Plan</td>
<td>1_11997</td>
<td>20261</td>
<td>C1_SUMPLN</td>
<td>100</td>
<td>74.58</td>
</tr>
<tr>
<td>GAEL Element</td>
<td>December</td>
<td>1st Distribution</td>
<td>A57310</td>
<td>1_11997</td>
<td>20261</td>
<td>C1_SUMPLN</td>
<td>100</td>
<td>52.21</td>
</tr>
</tbody>
</table>
Agenda

1. Introduction to Compensation Planning and Human Capital Planning
2. Key HCP Concepts
3. Understanding my Employee and Position Data
4. Managing Existing Employees and Positions
5. Mass Extending Appointment End Dates
6. Planning for a New Position with a To Be Hired Employee
7. Planning Pooled Positions
8. Planning Compensation Expenses at the DeptID
9. Post Training Support
## Where to start be in HCP?

<table>
<thead>
<tr>
<th>HCP Planning Actions</th>
<th>FY 16 Forecast</th>
<th>FY 17 Operating Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Review Existing Employees</strong></td>
<td>How has refresh impacted your Forecast?</td>
<td>How has refresh impacted your Operating Budget?</td>
</tr>
<tr>
<td><strong>Update Existing Employees</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Salary</td>
<td></td>
<td>Yes – If material to budget. Central assumptions, such as merit, may be applied globally.</td>
</tr>
<tr>
<td>• FTE</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Distributions</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Status (Leaves of Absences)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Separations (Terminations?)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• DeptID? Transfers</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Planning for New Position and Employee Hires</strong></td>
<td>Yes – If material to budget and not captured in 1/24 snapshot</td>
<td>Yes – If material to budget</td>
</tr>
<tr>
<td><strong>Updating Existing Positions</strong></td>
<td>Yes – If material to budget and not captured in 1/24 snapshot</td>
<td>Yes – If material to budget</td>
</tr>
<tr>
<td>• Terminating Positions</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Update Copied Pooled Positions</strong></td>
<td>Do the user-created positions still apply to the current budget cycle? Do the Salary or FTE need updating?</td>
<td>Review for impact</td>
</tr>
<tr>
<td>• Any positions not created in Forecast</td>
<td></td>
<td>• Distribution End Dates</td>
</tr>
<tr>
<td>• Distribution End Dates</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Update DeptID Compensation Adjustments</strong></td>
<td>Do the adjustments created for this year’s Operating Budget still apply to this year’s Forecast?</td>
<td>Review for impact</td>
</tr>
<tr>
<td>• Distribution End Dates</td>
<td></td>
<td>• Any new DeptID plans</td>
</tr>
<tr>
<td><strong>Updating Existing Positions</strong></td>
<td>Yes – If material to budget and not captured in 1/24 snapshot</td>
<td>Yes – If material to budget</td>
</tr>
<tr>
<td>• Terminating Positions</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Employee and Position Compensation by Fund buckets report that includes all employees with distributed expenses attached to Entity selection in POV.

<table>
<thead>
<tr>
<th>HCP001</th>
<th>Total Compensation</th>
<th>YearTotal</th>
<th>Forecast</th>
<th>Working</th>
<th>Program_Code</th>
<th>Earn_Code</th>
</tr>
</thead>
</table>

| Bowie, David (E00000007) | Rock Star (P00012751) | Professor-Law School CCI | $ 100,228,090 | $ 99,685,090 | - | - | $ 543,000 | - |
| Clinton, Hillary (E0000000100) (P00012752) | $ 228,090 | $ 211,934 | - | - | $ 16,156 | - |
| Obama, Barak (E000010000) (P00014467) | $ 397,155 | $ 380,355 | - | - | $ 16,800 | - |
| Waters, Alice (E000000009) | Fundraiser 4 (P00032298) | $ 74,481 | $ 74,481 | - | - | - | - |
| Pooled Employee | Prior Position 5 | $ 65,452 | - | - | - | $ 32,726 | 32,726 |
| Pooled Employee | Prior Position 7 | $ 36,130 | - | - | - | $ 36,130 | - |
| Pooled Employee | Prior Position 9 | $ 413,081 | $ 413,081 | - | - | - | - |
| Pooled Employee | Prior Position 10 | $ 2,967,222 | $ 2,967,222 | - | - | - | - |
| Pooled Employee | Prior Position 73 | $ 239,373 | - | - | - | $ 239,373 | - |
| Pooled Employee | Prior Position 74 | $ 30,285 | - | - | - | $ 30,285 | - |
| Pooled Employee | Prior Position 117 | $ 5,048 | - | - | - | $ 5,048 | - |
| DeptID Adjustments | | $ 436,581 | $ 413,081 | 23,500 | 5,048 | $ 914,469 | 32,726 |
| Total Employees | Total Positions | $ 105,120,986 | $ 104,145,243 | 23,500 | 5,048 | $ 914,469 | 32,726 |
HCP Data Refreshed from HCM in FY16 Forecast

A snapshot of HCM data was taken on 1/25/16. The snapshot includes all *active* HCM data on and after 7/1/15.

<table>
<thead>
<tr>
<th>HCM</th>
<th>HCP</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Actual</strong> Employee and Position Data</td>
<td><strong>Plan</strong> using <em>static</em> Employee &amp; Position Data</td>
</tr>
<tr>
<td><strong>Employee Data</strong> (Name, EmpID)</td>
<td><strong>Employee Data</strong> (Name, EmpID)</td>
</tr>
<tr>
<td><strong>Position Data</strong> (Position Number, L7 Dept, Job Code, Distributions)</td>
<td><strong>Position Data</strong> (Position number, Job Code, Distributions, Plan Home Dept)</td>
</tr>
<tr>
<td><strong>Vacant Positions</strong> in HCM as of 1/24/16 with an effective start date = or &gt; 7/1/15</td>
<td><strong>Active Vacant Positions</strong></td>
</tr>
<tr>
<td><strong>Multiple Headcount Positions</strong></td>
<td><strong>Shared Positions</strong></td>
</tr>
<tr>
<td><strong>13 Positions Types</strong> – (e.g. GSR/GSI, Summer Salary) details follow</td>
<td><strong>Pooled Positions – User created</strong> to plan for these Employee and Position expenses</td>
</tr>
<tr>
<td><strong>Additional Compensation</strong></td>
<td><strong>DeptID Adjustments – User created</strong></td>
</tr>
</tbody>
</table>

HCM data was taken on 1/25/16, including all active HCM data on and after 7/1/15. The data includes:

- **Employee Data** (Name, EmpID)
- **Position Data** (Position Number, L7 Dept, Job Code, Distributions)
- **Vacant Positions** in HCM as of 1/24/16 with an effective start date = or > 7/1/15
- **Multiple Headcount Positions**
- **13 Positions Types** – (e.g. GSR/GSI, Summer Salary) details follow
- **Additional Compensation**
### Status of HCP Positions and DeptID Adjustments as of 2/4/16

<table>
<thead>
<tr>
<th>HCP Data Type</th>
<th>Prior to 2/4 Data Refresh</th>
<th>After 2/4 Data Refresh</th>
</tr>
</thead>
<tbody>
<tr>
<td>Single Incumbent and Shared</td>
<td>Loaded data from HCM in Jan 2015, user adjusted</td>
<td>Data cleared and refreshed on 2/4 with active</td>
</tr>
<tr>
<td>Employees and Positions</td>
<td>until 1/25/16</td>
<td>Employee and Position data in HCM effective</td>
</tr>
<tr>
<td></td>
<td></td>
<td>7/1/15</td>
</tr>
<tr>
<td>New Positions</td>
<td>User Created</td>
<td>Clear from HCP but loaded with active vacant</td>
</tr>
<tr>
<td>To Be Hired Employees</td>
<td>User Created</td>
<td>vacant positions</td>
</tr>
<tr>
<td>Pooled Positions</td>
<td>User Created</td>
<td>Clear from HCP</td>
</tr>
<tr>
<td>DeptID Adjustments</td>
<td>User Created</td>
<td>Keep in HCP</td>
</tr>
<tr>
<td></td>
<td></td>
<td>with recommended updates</td>
</tr>
</tbody>
</table>
Accessing HCP

The Oracle **Workspace** is the main interface for all CalPlanning applications.

Access the **Production** Workspace:
https://calpln-rptportal.berkeley.edu/workspace/index.jsp
Logging Into HCP

We will now complete

Exercise 1
HCP Exercise Workbook
LOG IN & RUN HCPOO1
Setting Entity Preferences

Planners only need to set their Entity in Preferences in order to have a consistent view of data between CalPlan and HCP.

MyOrg: Entity that results in the population of DeptID Entities on forms and used in system calculations.
HCP Planner Task List outlines the steps of employee and position Compensation Planning for your current year Forecast and next year’s Operating Budget.
We will now complete

**Exercise 2**

HCP Exercise Workbook

**LAUNCH PLANNING**

& **SET ENTITY**
1. Introduction to Compensation Planning and Human Capital Planning
2. Key HCP Concepts
3. Understanding my Employee and Position Data
4. Managing Existing Employees and Positions
5. Mass Extending Appointment End Dates
6. Planning for a New Position with a To Be Hired Employee
7. Planning Pooled Positions
8. Planning Compensation Expenses at the DeptID
9. Post Training Support
Manage Existing Employees and Positions Form

Data in the Manage Existing Employees and Positions form refreshed from HCM on 1/25/16
# Manage Existing Employees and Position Form Fields

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
<th>Read-Only/Editable</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee Number</td>
<td>E + Employee ID from HCM snapshot</td>
<td>Read-Only</td>
</tr>
<tr>
<td>Position Number</td>
<td>P + Position ID from HCM snapshot</td>
<td>Read-Only</td>
</tr>
<tr>
<td>Entity</td>
<td>Org represents Employee’s Planned Home Department (PHD) from HCM</td>
<td>Change PHD (DFL Access)</td>
</tr>
<tr>
<td>Employee Name</td>
<td>Last, First from HCM snapshot</td>
<td>Read-Only</td>
</tr>
<tr>
<td>Position Title</td>
<td>Position Title from HCM snapshot</td>
<td>Read-Only</td>
</tr>
<tr>
<td>Appointment Start</td>
<td>HCM Job Start Date (prior to any HCP edits)</td>
<td>Editable on Employee Details</td>
</tr>
<tr>
<td>Appointment End</td>
<td>HCM Job End Date (prior to any HCP edits) *</td>
<td>Editable on Employee Details</td>
</tr>
<tr>
<td></td>
<td>*see details on which HCP appt has been extended for you this year</td>
<td></td>
</tr>
<tr>
<td>Appointment Type</td>
<td>Job Codes from HCM are mapped to an Appointment Type in HCP</td>
<td>Read-Only</td>
</tr>
<tr>
<td>Average FTE</td>
<td>FTE value in HCP Averaged for Fiscal Year</td>
<td>FTE is Editable on Employee Details</td>
</tr>
<tr>
<td>Year End Status</td>
<td>Active or Inactive as of June 30th of FY, based upon HCP appt end date</td>
<td>Read-Only</td>
</tr>
<tr>
<td>Reg Salary Expense</td>
<td>Calculated Salary value in HCP: FTE, Salary, Distribution, Appointment by each component’s effective dates</td>
<td>Read Only, dynamically impacted by any HCP edits to: edit FTE, Salary, Distribution, Appt Start &amp; End Dates</td>
</tr>
<tr>
<td>Total Compensation</td>
<td>Calculated Salary + Benefits</td>
<td></td>
</tr>
</tbody>
</table>

**Check out the [CalPlanning February 2016 Release Notes](http://budget.berkeley.edu/calplanningreleasenotesfeb16) for more details**
HCP highlights Appointment Start and Appointment End dates for employees who are NOT planned for the full budget cycle range.

- Start Dates after 7/1/15
- End Dates before 6/30/17
HCP

FY16 Forecast and FY17 Operating Budget

HCP Manage Existing Employees & Positions Form

FY16 Forecast

FY17 Operating Budget
Navigating HCP Planning Forms

Right Clicking into Employees

- Locate the row containing the employee you would like to review. Manage Existing Employees... form sorted Alpha by employee last name.
- Mouse over the Entity column in that row to display the solid black right facing arrow and right click to display the navigation box.
HCP Planning Forms

• HCP forms provide an interface for users to complete the planning processes.
• HCP forms are laid out in a similar manner that provides user friendly options for finding, viewing and editing data.

• Some HCP task list forms have multiple tabs for additional information and/or planning.
Navigating in HCP

- HCP links multiple forms from within each task.
- Planners can navigate to forms using:

  **Right Click Navigation**  Right-click is sensitive to cell, row, and column placement, and will generate specific menu actions applicable to that location.

**Breadcrumbs or Footprints**  A clickable trail that provides a path to where you are currently located within forms, and links back to previous forms.

Cells with white background fill are editable.
Planning Home Department (PHD) Lookup

Identifies the Planned Home Department for employees in HCP and useful when

- Locating an Employee in HCP not displaying in your Manage Existing Employees & Positions form
- Sharing the costing of an Employee across departments

- Enter employee name into Member field
- Click the green right arrow to search for the employee and their PHD
Changing the Planner Home Department in HCP

Planned Home Department (PHD)

- CalPlanning Access Providers for each unit will have access to change the Planned Home Department of an Employee
- Task List provided that allows users to update Planner Home Department
Do Not Sort or Filter Data in HCP Forms

Sort & Filter display as option in the right click menu however, the functionality is not currently working as expected.
**Smart Lists**

**HCP Smart Lists** streamline data entry by enabling Planners to view relevant values from a custom drop-down.
HCP Distribution Defaults

• When adding or updating distributions in CalPlanning, users will need to select Fund and CF1s.
• Some values are required, but may not always need to be directly entered by the user.
  • Entity: Required
  • Account: Pre-populated based on Employee or Compensation Type (i.e. staff, vacation, fringe, etc.)
• Chart1 and Fund should be updated, if not, the system will apply a default value:
  • Default Chart1: C1_Summary_Plan
  • Default Fund: HCP_Missing_Distribution (Unrestricted)
### 10 Month Salaries Paid over 12 Months

HCM and HCP annual salaries match for Employees with ‘1/10’ in the description (i.e. Lecturer-Acad Yr-1/10)

<table>
<thead>
<tr>
<th></th>
<th>Annual Rate</th>
<th>Monthly Rate</th>
<th>Months Paid</th>
<th>Total Annual Salary</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>HCM Salary</strong></td>
<td>$30,000</td>
<td>$3,000</td>
<td>5</td>
<td>$15,000</td>
</tr>
<tr>
<td><strong>Former HCP Salary</strong></td>
<td>$30,000</td>
<td>$2,500</td>
<td>5</td>
<td>$12,500</td>
</tr>
<tr>
<td><strong>Current HCP Salary</strong></td>
<td>$36,000</td>
<td>$3,000</td>
<td>5</td>
<td>$15,000</td>
</tr>
</tbody>
</table>

HCP spreads annual salaries over 12 months. HCP functionality is applied to employees with ‘1/10’ to multiply annual salary by 12/10 so that the 12 month spread and annual salary are correctly calculated.
Changes to Existing Employees

Employee Changes
- Status
- FTE
- Salary
- Distribution
- Transfer or Separate
Managing Employees and Distributions

We will now complete Exercises #3-6
HCP Exercise Workbook
Agenda

1. Introduction to Compensation Planning and Human Capital Planning
2. Key HCP Concepts
3. Understanding my Employee and Position Data
4. Managing Existing Employees and Positions
5. Mass Extending Appointment End Dates
6. Planning for a New Position with a To Be Hired Employee
7. Planning Pooled Positions
8. Planning Compensation Expenses at the DeptID
9. Post Training Support
Mass Extended Appointment Dates

- Most HCP appointment end dates have been extended for you
- Most Non-contract employees were extended in HCP to 12/31/2099, to eliminate the need for users to update manually
- Appointments in HCM with a last distribution end date greater than 12/31/2015 were extended
- Extension of 12/31/2099 applied to appointment, salary, FTE and distribution end dates
- HCM End date is now available for viewing in the Employee Status form
- HCP highlights start and end dates of employees who are NOT planned for the full budget cycle range
Your Compensation Budget may be understated if you have employees with appointment end dates in HCM set to occur mid-year:

- Updates not yet captured in HCP
- Contract Employees
- Semester Based Employees (Lecturers)
- What else?

In HCP, you can Extend the Appointment information for an individual employee, or Extend Appointment and Distributions for many.

---

**Extend Appointment for One Employee**

**Extend Appointment for Many Employees**

---

February 2016
Mass Extend Appointments

HCP Mass Extend allows Planner to extend more than one appointment at a time

Use the Mass Extend Appointment End Date business rule to:
• Create a list of employees
• Extend the appointment end dates of all employees on the list
• Update the appointment and distribution end dates at the same time.
We will now complete Exercise 7
HCP Exercise Workbook
Agenda

1. Introduction to Compensation Planning and Human Capital Planning
2. Key HCP Concepts
3. Understanding my Employee and Position Data
4. Managing Existing Employees and Positions
5. Mass Extending Appointment End Dates
6. Planning for a New Position with a To Be Hired Employee
7. Planning Pooled Positions
8. Planning Compensation Expenses at the DeptID
9. Post Training Support
# Status of HCP Positions and DeptID Adjustments as of 2/4/16

<table>
<thead>
<tr>
<th>HCP Data Type</th>
<th>Prior to 2/4 Data Refresh</th>
<th>After 2/4 Data Refresh</th>
</tr>
</thead>
<tbody>
<tr>
<td>Single Incumbent and Shared Employees</td>
<td>Loaded data from HCM in Jan 2015, user adjusted until 1/25/16</td>
<td>Data cleared and refreshed on 2/4 with active Employee and Position data in HCM effective 7/1/15</td>
</tr>
<tr>
<td>New Positions</td>
<td>User Created</td>
<td>Clear from HCP but loaded with active vacant positions</td>
</tr>
<tr>
<td>To Be Hired Employees</td>
<td>User Created</td>
<td>Clear from HCP</td>
</tr>
<tr>
<td>Pooled Positions</td>
<td>User Created</td>
<td>Keep in HCP with recommended updates</td>
</tr>
<tr>
<td>DeptID Adjustments</td>
<td>User Created</td>
<td>Keep in HCP</td>
</tr>
</tbody>
</table>
Vacant Positions

A position is considered Vacant when it is not associated with any Employee(s)

- Position
  - Status = Active

Employee
- Status = Active
-Salary × FTE

Distribution % (s)
- Begin & End dates
- Can have multiple distributions

Compensation Expense
- $ @ Dept ID

It can also have a vacancy when the FTE of the Position is not fully resourced to Employees.

Shared Position
- FTE = 2.0

Employee
- FTE = 1.0

Vacancy of 1.0 FTE

*Reporting on vacancy savings will likely be available at a later time.*
Planning for New Positions and To-Be-Hired Employees

- HCP only calculates a Compensation Expense for Positions with Employee(s)
- HCM will include Vacant Positions---those without an employee(s)---but does not know of a unit’s future hiring plans.
- HCP Planners can create New Positions and To-Be-Hired employees to plan for future compensation expenses.
Planning To Be Hired Employees

Create and Manage Vacant Positions
form will display all Vacant Positions form HCM and then updates with your edits in HCP by FTE and by Month

- Cells with green (Forecast) blue (Operating Budget) backfill display the number of available FTE for each vacant position

- Right-click the position and assign an employee to a vacant position.
Create a New Position and Assign a To Be Hired Employee

We will now complete

Exercise #8
HCP Exercise Workbook
Agenda

1. Introduction to Compensation Planning and Human Capital Planning
2. Key HCP Concepts
3. Understanding my Employee and Position Data
4. Managing Existing Employees and Positions
5. Mass Extending Appointment End Dates
6. Planning for a New Position with a To Be Hired Employee
7. Planning Pooled Positions
8. Planning Compensation Expenses at the DeptID
9. Post Training Support
Create Pooled Positions by DeptID and Type without an Effective End Date

Once created Pooled Positions can be managed using
- Effective Start and End Dates on Distributions
- Position FTE and Headcount

DeptID Student Titles/Undergrad

- GSR
- Summer Salary
- Visiting Prof

DeptID Lecturer

- GSI
- Per Diem
- Teacher UNEX

DeptID Lecturer

- Summer Salary
- Visiting Prof

DeptID Lecturer
# HCP Pooled Position Types

Due to the complexity and frequency of funding changes, **HCM data for pooled positions is not loaded into HCP**

- **HCP Planners** create Pooled Positions using the **Pooled Position Types** on the left
- **Pooled Positions Type** drive Salary Expense Accounts and Fringe Rates
- **Pooled Positions** do not have individual employee detail
- **Total FTE** is used for calculating Total Salary Expense
- **Headcount** is used for calculating Fee Remissions where applicable
- **Student Titles Pooled Positions** may be more summarized in HCP than HCM – Supervisor ID is not included in HCP, and there is no requirement to have this level of detail
- **Lecturer** (other than those with Security of Employment) Additionally, ‘Teacher - Special Programs; and Admissions Evaluator 3’ data should be planned for in the pool

<table>
<thead>
<tr>
<th>Pooled Position Types</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visiting Professors</td>
</tr>
<tr>
<td>Adjunct Professors</td>
</tr>
<tr>
<td>GSR - Resident</td>
</tr>
<tr>
<td>GSR - Non-Resident</td>
</tr>
<tr>
<td>GSI</td>
</tr>
<tr>
<td>Reader/Tutor - Student</td>
</tr>
<tr>
<td>Reader/Tutor - Non-student</td>
</tr>
<tr>
<td>Student Titles (Undergrad)</td>
</tr>
<tr>
<td>Student Titles (Work-study)</td>
</tr>
<tr>
<td>Summer Salary</td>
</tr>
<tr>
<td>Teacher – UNEX</td>
</tr>
<tr>
<td>Per Diem</td>
</tr>
<tr>
<td>Lecturer</td>
</tr>
</tbody>
</table>
# FY16 & FY17 Pooled Position Account Defaults

<table>
<thead>
<tr>
<th>Pooled Position Type</th>
<th>Comp Account</th>
<th>Compensation Account Description</th>
<th>Fringe Account</th>
<th>Fringe Account Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adjunct Professors</td>
<td>A50240</td>
<td>Academic-Teaching Regular (default)</td>
<td>A53060</td>
<td>Benefit Assess-Acad Regular</td>
</tr>
<tr>
<td>GSI</td>
<td>A50241</td>
<td>Academic-Teaching Exempt from CBR</td>
<td></td>
<td></td>
</tr>
<tr>
<td>GSR - Non-Resident</td>
<td>A50211</td>
<td>Academic-Exempt from CBR</td>
<td></td>
<td></td>
</tr>
<tr>
<td>GSR - Resident</td>
<td>A50211</td>
<td>Academic-Exempt from CBR</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Reader/Tutor - Non-student</td>
<td>A50240</td>
<td>Academic-Teaching Regular (default)</td>
<td>A53060</td>
<td>Benefit Assess-Acad Regular</td>
</tr>
<tr>
<td>Reader/Tutor - Student</td>
<td>A50241</td>
<td>Academic-Teaching Exempt from CBR</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Student Titles (Undergrad)</td>
<td>A51231</td>
<td>Staff-Exempt from CBR</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Student Titles (Workstudy)</td>
<td>A51029</td>
<td>Staff-Exempt from CBR</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Summer Salary</td>
<td>A50240</td>
<td>Academic-Teaching Regular (default)</td>
<td>A53060</td>
<td>Benefit Assess-Acad Regular</td>
</tr>
<tr>
<td>Teacher - UNEX</td>
<td>A50215</td>
<td>Academic-Regular (default)</td>
<td>A50211</td>
<td></td>
</tr>
<tr>
<td>Visiting Professors</td>
<td>A50240</td>
<td>Academic-Teaching Regular (default)</td>
<td>A53060</td>
<td>Benefit Assess-Acad Regular</td>
</tr>
<tr>
<td>Per Diem</td>
<td>A51210</td>
<td>Staff-Regular (default)</td>
<td>A53070</td>
<td>Benefit Assess-Staff Regular</td>
</tr>
<tr>
<td>Lecturer</td>
<td>A50240</td>
<td>Academic-Teaching Regular (default)</td>
<td>A53060</td>
<td>Benefit Assess-Acad Regular</td>
</tr>
</tbody>
</table>
## Status of HCP Positions and DeptID Adjustments as of 2/4/16

<table>
<thead>
<tr>
<th>HCP Data Type</th>
<th>Prior to 2/4 Data Refresh</th>
<th>After 2/4 Data Refresh</th>
</tr>
</thead>
<tbody>
<tr>
<td>Single Incumbent and Shared Employees and Positions</td>
<td>Loaded data from HCM in Jan 2015, user adjusted until 1/25/16</td>
<td>Data cleared and refreshed on 2/4 with active Employee and Position data in HCM effective 7/1/15</td>
</tr>
<tr>
<td>New Positions</td>
<td>User Created</td>
<td><strong>Clear</strong> from HCP but loaded with active vacant positions</td>
</tr>
<tr>
<td>To Be Hired Employees</td>
<td>User Created</td>
<td><strong>Clear</strong> from HCP</td>
</tr>
<tr>
<td>Pooled Positions</td>
<td>User Created</td>
<td><strong>Keep</strong> in HCP with recommended updates</td>
</tr>
<tr>
<td>DeptID Adjustments</td>
<td>User Created</td>
<td><strong>Keep</strong> in HCP</td>
</tr>
</tbody>
</table>
HCM Employee Details For HCP Pooled Report

‘HCM Employee Details for Planning HCP Pooled Positions’ report in BAIRS

• Created to assist CalPlanning HCP users in planning Pooled Positions
• Provides details on employees that are not imported into HCP
• Created from payroll actuals in order to report on:
  o Which employees actually worked/paid?
  o Actual expense vs. HCM projection
  o Distribution percentages
Planned Compensation Expense for Pooled Positions is similar to our other positions, however, there is no individual Employee information.

Compensation Expense is dispersed to Entity, Accounts, Funds, and Chart1’s using distributions.

**Pooled Position**

- **Status = Active**
- **Salary x FTE**

**Distribution % (s)** drive when/how to distribute expense

**Pooled Position Compensation Expense**

$ @ DeptID

---

**Task - Create and Manage HCP Pooled Positions**

<table>
<thead>
<tr>
<th>Pooled Position Type</th>
<th>Plan Home</th>
<th>Position Name</th>
<th>Salary Account</th>
<th>Salary Admin</th>
<th>Total FTE</th>
<th>Headcount</th>
<th>REG Salary Expense</th>
<th>Total Compensation Expense</th>
<th>Fee Remission Expense</th>
<th>Total FTE</th>
<th>Headcount</th>
<th>REG Salary Expense</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Position 14</td>
<td>1_11871</td>
<td>Lecturer</td>
<td>Acad Teach-Reg</td>
<td>Not Defined</td>
<td>1</td>
<td>1.970</td>
<td>1.970</td>
<td>0.25</td>
<td>1.970</td>
<td>0.25</td>
<td>1</td>
<td>1.970</td>
</tr>
<tr>
<td>Prior Position 503</td>
<td>1_11867</td>
<td>HR Academic</td>
<td>Staff-Exempt from C</td>
<td>Not Defined</td>
<td>0.25</td>
<td>1</td>
<td>1.550</td>
<td>1.970</td>
<td>0.25</td>
<td>1</td>
<td>1</td>
<td>1.970</td>
</tr>
<tr>
<td>Prior Position 505</td>
<td>1_11867</td>
<td>HR Student Assistant</td>
<td>Not Defined</td>
<td>Not Defined</td>
<td>0.25</td>
<td>1</td>
<td>1.550</td>
<td>1.970</td>
<td>0.25</td>
<td>1</td>
<td>1</td>
<td>1.970</td>
</tr>
</tbody>
</table>
Planning a Pooled Position

My Task List
- Reference Tools
- HCP Planner Task List
  - Manage Existing Employees and Positions
  - Mass Extend Appointment End Date
  - Create and Manage Vacant Positions
- Create and Manage HCP Pooled Positions
- Dept ID Comp Adjustments
- Review

Runtime Prompts - HCPAddNewPooledPosition

Prompt Text
- * Required: Select the Entity
- * Required: Enter the Pooled Position Name
- * Required: Select the Pooled Position Type
- * Required: Enter the annual rate (per FTE)
- * Required: Enter the FTE
- * Required: Enter the Headcount
- * Required: Enter the Start Date

Task - Create and Manage HCP Pooled Positions

Create Pooled Position:
- 1. Create New Position
- 2. Add Distributions
Create and Manage a Pooled Position

We will now complete

**Exercise #9**

HCP Exercise Workbook
Agenda

1. Introduction to Compensation Planning and Human Capital Planning
2. Key HCP Concepts
3. Understanding my Employee and Position Data
4. Managing Existing Employees and Positions
5. Mass Extending Appointment End Dates
6. Planning for a New Position with a To Be Hired Employee
7. Planning Pooled Positions
8. Planning Compensation Expenses at the DeptID
9. Post Training Support
Additional Compensation and DeptID Adjustments

Compensation Planning
- Additional Pay data is not loaded from HCM to HCP
- HCP functionality provides ability for units to plan for additional compensation by Employee or DeptID
- Planners can assign distributions to Employees or DeptIDs

DeptID Compensation Adjustments
- A form that provides the ability to plan Compensation Earnings at the DeptID level (not associated with an Employee or Position, but being charged against Compensation Accounts)
- Assists in reducing the effort level of planning for changes to DeptIDs
DeptID Adjustments

Unlike other HCP forms, the DeptID Adjustment form requires Scenario_Version_FY POV Selections

## Status of HCP Positions and DeptID Adjustments as of 2/4/16

<table>
<thead>
<tr>
<th>HCP Data Type</th>
<th>Prior to 2/4 Data Refresh</th>
<th>After 2/4 Data Refresh</th>
</tr>
</thead>
<tbody>
<tr>
<td>Single Incumbent and Shared Employees and Positions</td>
<td>Loaded data from HCM in Jan 2015, user adjusted until 1/25/16</td>
<td>Data cleared and refreshed on 2/4 with active Employee and Position data in HCM effective 7/1/15</td>
</tr>
<tr>
<td>New Positions</td>
<td>User Created</td>
<td>Clear from HCP but loaded with active vacant positions</td>
</tr>
<tr>
<td>To Be Hired Employees</td>
<td>User Created</td>
<td>Clear from HCP</td>
</tr>
<tr>
<td>Pooled Positions</td>
<td>User Created</td>
<td>Keep in HCP with recommended updates</td>
</tr>
<tr>
<td>DeptID Adjustments</td>
<td>User Created</td>
<td>Keep in HCP</td>
</tr>
</tbody>
</table>
Additional Compensation and DeptID Adjustments

- Right-click the DeptID to manage Compensation Adjustments
Review Task Forms

- **All Employee Distributions**
  All your employees and their distributions

- **All DeptID Comp Adjustments and Distributions**
  An overview of your DeptID Adjustments and the associated distributions

- **Planning Home Dept Lookup**
  Find the Planning Home Dept of any employee

- **All Pooled Position Distributions**
  An overview of your Pooled Positions and the associated distributions

Use review forms to see your data in mass, and to locate and find your employee information
Review Forms in HCP and Excel

All DeptID Comp Adjustments Distributions

<table>
<thead>
<tr>
<th>Distribution Entity Desc</th>
<th>Distribution Account Desc</th>
</tr>
</thead>
<tbody>
<tr>
<td>1_10534 - BAHSB Acad Faculty Gen Ops</td>
<td>1_10534 - BAHSB Acad Faculty Gen Ops</td>
</tr>
<tr>
<td>2nd Distribution</td>
<td>2nd Distribution</td>
</tr>
<tr>
<td>1_10534 - BAHSB Acad Faculty Gen Ops</td>
<td>50215 - Acad Nonteach-Regular (Default)</td>
</tr>
<tr>
<td>1_10537 - BAHSB Acad Student Employees</td>
<td>1_10537 - BAHSB Acad Student Employees</td>
</tr>
<tr>
<td>1st Distribution</td>
<td>1st Distribution</td>
</tr>
<tr>
<td>1_10537 - BAHSB Acad Student Employees</td>
<td>50241 - Acad Teach-Exempt from CBR</td>
</tr>
<tr>
<td>2nd Distribution</td>
<td>2nd Distribution</td>
</tr>
<tr>
<td>1_10535 - BAHSB Temporary Instruction</td>
<td>1_10535 - BAHSB Temporary Instruction</td>
</tr>
<tr>
<td>1st Distribution</td>
<td>1st Distribution</td>
</tr>
<tr>
<td>1_10535 - BAHSB Temporary Instruction</td>
<td>50215 - Acad Nonteach-Regular (Default)</td>
</tr>
<tr>
<td>3rd Distribution</td>
<td>3rd Distribution</td>
</tr>
<tr>
<td>1_10535 - BAHSB Temporary Instruction</td>
<td>50240 - Acad Teach-Regular (Default)</td>
</tr>
<tr>
<td>1_10187 - BAHSB Devel Alumni Relations</td>
<td>1_10187 - BAHSB Devel Alumni Relations</td>
</tr>
<tr>
<td>1st Distribution</td>
<td>1st Distribution</td>
</tr>
<tr>
<td>1_10187 - BAHSB Devel Alumni Relations</td>
<td>51210 - Staff Regular (Default)</td>
</tr>
<tr>
<td>1_10448 - BAHSB Career Gen Ops</td>
<td>1_10448 - BAHSB Career Gen Ops</td>
</tr>
<tr>
<td>1st Distribution</td>
<td>1st Distribution</td>
</tr>
<tr>
<td>1_10448 - BAHSB Career Gen Ops</td>
<td>51029 - Work Study (251029)</td>
</tr>
</tbody>
</table>

All Pooled Positions Distributions

<table>
<thead>
<tr>
<th>Pooled Position Type</th>
<th>Plan Home Dept</th>
<th>Position Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Prior Position 68</td>
<td>Adjunct Professors</td>
<td>1_10534 - Adjunct Professors_10534</td>
</tr>
<tr>
<td>Prior Position 194</td>
<td>Visiting Professors</td>
<td>1_10535 - Visiting Professors_10535</td>
</tr>
<tr>
<td>Prior Position 154</td>
<td>Reader/Tutor - Student</td>
<td>1_10314 - Reader/Tutor - Student</td>
</tr>
<tr>
<td>Prior Position 141</td>
<td>Reader/Tutor - Student</td>
<td>1_10249 - Reader/Tutor - Student</td>
</tr>
<tr>
<td>Prior Position 152</td>
<td>Reader/Tutor - Student</td>
<td>1_10292 - Reader/Tutor - Student</td>
</tr>
<tr>
<td>Prior Position 133</td>
<td>GSR - Resident</td>
<td>1_10210 - GSRs_10210</td>
</tr>
</tbody>
</table>

Export to Excel:
- > Tools
- > Export as Spreadsheet
Planning a DeptID Compensation Adjustment

We will now complete

Exercise #10
HCP Exercise Workbook
Agenda

1. Introduction to Compensation Planning and Human Capital Planning
2. Key HCP Concepts
3. Understanding my Employee and Position Data
4. Managing Existing Employees and Positions
5. Mass Extending Appointment End Dates
6. Planning for a New Position with a To Be Hired Employee
7. Planning Pooled Positions
8. Planning Compensation Expenses at the DeptID
9. Post Training Support
Budget Labs

From February to April CalPlanning members can attend Budget Labs where they can get their planning questions answered by CalPlanning and Budget Office staff.

Bring your laptop *(let us know if you need one)* to work on revising your FY2016 Forecast and creating your FY2017 Operating Budget.

Budget Labs will be held in University Hall with most sessions on:
• Wednesdays 2:00-4:00pm
• Thursdays 2:00-4:00pm
• Fridays 10:00-12:00pm

Sign up at the [CalPlanning training page](#)!
Check out the CalPlanning website for up to date info on:

- Latest news and system updates
- Links to the CalPlanning Workspace
- Training, reference materials and local unit support
- Monthly Actuals Upload Schedule
- Help Desk Information

http://budget.berkeley.edu/systems/calplanning
Support: Technical and Non-Technical

For technical help with the CalPlanning tool (including logging into or using CalPlan, CalRptg, HCP, HCPRptg and Smart View), contact:

- CalPlanning Help Desk
  - Hours: 8 a.m. to 5 p.m., Monday - Friday, except for University holidays
  - E-mail: calplanhelp@berkeley.edu
  - Phone: (510) 664-9000, Phone Tree: Option 1 (IT), Option 2, then Option 4 (CalPlanning)

For non-technical Budget Process help including questions about your Division’s requirements, decisions for your unit and your CalPlanning access contact your

- Local CalPlanning Support Person
- Divisional Finance Leader (DFL)
- Campus Budget Office/Portfolio Budget Office (PBO)
  - Email: http://budget.berkeley.edu/PBO
  - Website: http://budget.berkeley.edu/index.html
Training Evaluation

Please take a moment to complete a training evaluation.
Appendix
These two dimensions are **not visible to you.** (They are working behind the screen for you.)

You will see all of the **members** of these two dimensions in HCP, for tracking purposes and housing the data.

In the future, you could run a report to show the changes over time to an employee or position.

**Element:** stores all the compensation components and salary grade structures.

**Budget Item:** contains FTE assignments and changes, status assignments and changes, compensation element changes, and GL account allocations.