Creating a Compensation Plan in Human Capital Planning (HCP)
FY2017-18
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
  - Planning 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 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.
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. Making Changes via the Employee Mass Update Form
6. Mass Extending Employee End Dates
7. Planning for a New Position with a To Be Hired Employee
8. Planning Pooled Positions
9. Planning Compensation Expenses at the DeptID
10. 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 1/30/17? 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 FY17 and FY18 are not incorporated into my current Forecast and Operating Budget? Do I need to make any adjustments to my Pooled Positions? Do I need to add DeptID Adjustments?
- 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 FY17 Forecast Working Compensation Expenses to my
  - FY17 Actuals Final YTD
  - FY17 Operating Budget Final
  - FY16 Actuals Final
Who Uses HCP?

<table>
<thead>
<tr>
<th></th>
<th>Reporting Only</th>
<th>Planners</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Tool</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Current</td>
<td>CalRptg</td>
<td>HCP</td>
</tr>
<tr>
<td></td>
<td>HCPRLptg</td>
<td>HCPRptg</td>
</tr>
<tr>
<td></td>
<td>CalPlan</td>
<td>CalRptg</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Actions</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Run</td>
<td>CalRptg reports</td>
<td></td>
</tr>
<tr>
<td></td>
<td>HCPRLptg reports</td>
<td></td>
</tr>
<tr>
<td>Analyze</td>
<td>reports</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Analyze reports</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Input financial plans</td>
<td>Input employee and position plans</td>
</tr>
<tr>
<td></td>
<td>Run &amp; analyze CalRptg and CalPlan reports</td>
<td>Run &amp; analyze HCPRptg reports</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Security</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Global</td>
<td>Global Read Only</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Entity Read Only</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Entity Read &amp; Write Access</td>
<td>Entity Read &amp; Write Access</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
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
HCPRptg Tool

HCPRptg provides 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

* Data pushes every three hours between 9:00am and 9:00pm. Check [http://budget.berkeley.edu/systems/calplanning](http://budget.berkeley.edu/systems/calplanning) for more on the data push schedule and updates to CalPlanning system availability.
2/08/17: FY2017 Forecast is the base for your FY2018 Operating Budget

**FY17 Forecast Working**
- Beginning Balances loaded from Actuals in September 2016

**CalPlan Annual Plan**
- Revenues
- Operating Transfers
- Non-Compensations

**HCP Employee & Position Plan**
- Planned Compensation Expenses for 7/01/16 to 6/30/17
  - All DeptID Adjustments Removed

**FY17 Forecast Working (as of 1.31.17)**

**FY17 Fee Remission Rates**

**COPIED to FY18 Operating Budget**

**FY18 Operating Budget Working**
- Beginning Balances loaded with FY17 Forecast Ending Balances

**CalPlan Annual Plan**
- Revenues
- Operating Transfers
- Non-Compensations

**HCP Employee & Position Plan**
- Planned Compensation Expenses for 7/01/17 to 6/30/18
  - No FY17 DeptID Adjustments Copied

**3% Salary Increase**

*see appendix for FY18 rates*
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**.
Introduction to Compensation Planning and Human Capital Planning

Key HCP Concepts

Understanding my Employee and Position Data

Managing Existing Employees and Positions

Making Changes via the Employee Mass Update Form

Mass Extending Employee End Dates

Planning for a New Position with a To Be Hired Employee

Planning Pooled Positions

Planning Compensation Expenses at the DeptID

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 17 Forecast and FY 18 Op Budget)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account</td>
<td>FY 17 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>
</tbody>
</table>
| Fund                           | 19 Plan Only Fund Members for Planning  
HCM distributions Funds are mapped to **Plan Only Funds** in HCP                                    |
| Chart1                         | Subset of individual Chart1s** identified for Planning  
HCM distributions that included Chart1’s not identified for Planning are mapped to **C1_Summary_Plan** in HCP |
HCP Employee Dimension

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.
Key Position Terms

**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 is the portion of full time employment budgeted for an employee. FTE is used to calculate annualized salaries in HCP.

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

<table>
<thead>
<tr>
<th>Position Type</th>
<th># Employees</th>
<th># Positions</th>
<th>HCM 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 &gt; /or = 1</td>
<td>1</td>
<td>No</td>
<td>Total Combined</td>
<td>Planner Defined</td>
</tr>
</tbody>
</table>

- **Single** and **Shared** position types are captured in annual HCM to HCP Refresh
- **Pooled Positions** created by Planners in FY17 were maintained in HCP and must be updated &/or new ones created, as needed
## Key Concepts – Employee FTE and Distributions in HCP

<table>
<thead>
<tr>
<th>Definition:</th>
<th>Employee FTE</th>
<th>Employee Distributions</th>
</tr>
</thead>
<tbody>
<tr>
<td>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>
<td></td>
</tr>
<tr>
<td>Constraints:</td>
<td>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

<table>
<thead>
<tr>
<th>Employee 1</th>
<th>Employee 2</th>
<th>Employee 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bob has an FTE of 0.75. He has one distribution of 100%.</td>
<td>Sheri has a total FTE of 1.0 and works for three different units. She has three distributions: 50%, 25%, and 25%.</td>
<td>John has an FTE of 0.50 and works for two units. He has two distributions of 50% and 50%.</td>
</tr>
</tbody>
</table>
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>Position</th>
<th>Employee</th>
<th>Distribution</th>
<th>Compensation Expense</th>
</tr>
</thead>
<tbody>
<tr>
<td>Status = Active</td>
<td>Status = Active</td>
<td>Distribution %&lt;br&gt;Begin &amp; End dates</td>
<td>$ @ Dept ID</td>
</tr>
<tr>
<td>Salary x FTE</td>
<td>Salary x FTE</td>
<td>Distribution %&lt;br&gt;Can have multiple distributions</td>
<td>$ @ Dept ID</td>
</tr>
</tbody>
</table>

<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>A51210</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>A53020</td>
<td>1_11997</td>
<td>20261</td>
<td>C1_SUMPLN</td>
<td>100</td>
<td>2,834.17</td>
</tr>
<tr>
<td>GAEL 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
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3. Understanding my Employee and Position Data
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### Where to start be in HCP?

<table>
<thead>
<tr>
<th>HCP Planning Actions</th>
<th>FY 17 Forecast</th>
<th>FY 18 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>Yes – If material to budget. Central assumptions, such as merit, may be applied globally.</td>
</tr>
<tr>
<td>• Salary</td>
<td></td>
<td></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><strong>Planning for New Position and Employee Hires</strong></td>
<td>Yes – If material to budget and not captured in 1/30 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 1/30 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><strong>Plan 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></td>
<td></td>
<td>• Distribution End Dates</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Any new DeptID plans</td>
</tr>
</tbody>
</table>

February 2016
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 15-16</th>
<th>Program_Code 15-16</th>
<th>Earn_Code 15-16</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>2015-16</td>
<td>2015-16</td>
<td>2015-16</td>
<td>2015-16</td>
<td></td>
</tr>
<tr>
<td>Bowie, David (E00000007)</td>
<td>Rock Star (P00012751)</td>
<td>$100,228,090</td>
<td>$99,685,090</td>
<td>-</td>
<td>-</td>
<td>$543,000</td>
</tr>
<tr>
<td>Clinton, Hillary (E0000000100)(P00012752)</td>
<td>Professor-Law School CCI</td>
<td>$228,090</td>
<td>$211,934</td>
<td>-</td>
<td>-</td>
<td>$16,156</td>
</tr>
<tr>
<td>Obama, Barak (E000010000)</td>
<td>Professor-Law School CCI (P00014467)</td>
<td>$397,155</td>
<td>$380,355</td>
<td>-</td>
<td>-</td>
<td>$16,800</td>
</tr>
<tr>
<td>Waters, Alice (E000000009)</td>
<td>Fundraiser 4 (P00032298)</td>
<td>$74,481</td>
<td>$74,481</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Pooled Employee</td>
<td>Prior Position 5</td>
<td>$65,452</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>$32,726,32,726</td>
</tr>
<tr>
<td>Pooled Employee</td>
<td>Prior Position 7</td>
<td>$36,130</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>36,130</td>
</tr>
<tr>
<td>Pooled Employee</td>
<td>Prior Position 9</td>
<td>$413,081</td>
<td>$413,081</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Pooled Employee</td>
<td>Prior Position 10</td>
<td>$2,967,222</td>
<td>$2,967,222</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Pooled Employee</td>
<td>Prior Position 73</td>
<td>$239,373</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>239,373</td>
</tr>
<tr>
<td>Pooled Employee</td>
<td>Prior Position 74</td>
<td>$30,285</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>30,285</td>
</tr>
<tr>
<td>Pooled Employee</td>
<td>Prior Position 117</td>
<td>$5,048</td>
<td>-</td>
<td>-</td>
<td>$5,048</td>
<td>-</td>
</tr>
<tr>
<td>DeptID Adjustments</td>
<td></td>
<td>$436,581</td>
<td>$413,081</td>
<td>$23,500</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Total Employees</td>
<td>Total Positions</td>
<td>$105,120,986</td>
<td>$104,145,243</td>
<td>$23,500</td>
<td>$5,048</td>
<td>$914,469,32,726</td>
</tr>
</tbody>
</table>
A snapshot of HCM data was taken on 1/30/17. The snapshot includes all active HCM data on and after 7/01/16.

### HCM
- **Actual** Employee and Position Data

  - **Employee Data** (Name, EmpID)
  - **Position Data** (Position Number, L7 Dept, Job Code, Distributions)
  - **Vacant Positions** in HCM as of 1/30/17 with an effective start date = or > 7/1/16
  - **Multiple Headcount Positions**
  - **13 Positions Types** – (e.g. GSR/GSI, Summer Salary) details follow
  - **Additional Compensation**

### HCP
- **Plan** using static Employee & Position Data

  - **Employee Data** (Name, EmpID)
  - **Position Data** (Position number, Job Code, Distributions, Plan Home Dept)
  - **Active Vacant Positions**
  - **Shared Positions**
  - **Pooled Positions – User created** to plan for these Employee and Position expenses
  - **DeptID Adjustments – User created**

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Berkeley University of California

February 2016
# Status of HCP Positions and DeptID Adjustments as of 2/08/17

<table>
<thead>
<tr>
<th>HCP Data Type</th>
<th>PRIOR to 2/08/17 Data Refresh</th>
<th>AFTER 2/08/17 Data Refresh</th>
</tr>
</thead>
<tbody>
<tr>
<td>Single Incumbent, Shared Employees and Positions</td>
<td>HCM data loaded in January 2016, planner re-forecasted until 1/31/17</td>
<td>Refreshed on 2/08 with active Employee and Position data in HCM effective 7/01/16</td>
</tr>
<tr>
<td>New Positions</td>
<td>Planner Created</td>
<td>Cleared from HCP and refreshed with active vacant positions</td>
</tr>
<tr>
<td>To Be Hired Positions</td>
<td>Planner Created</td>
<td>Cleared from HCP</td>
</tr>
<tr>
<td>Pooled Positions</td>
<td>Planner Created</td>
<td>Retained in HCP and require review and possible revision</td>
</tr>
<tr>
<td>DeptID Adjustments</td>
<td>Planner Created</td>
<td>Cleared from HCP for both FY17 Forecast and FY18 Operating Budget</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](https://calpln-rptportal.berkeley.edu/workspace/index.jsp)
Navigating to HCP Reports

HCP Reports are accessed from the **HCPRptg Report Repository** using the ![Explore icon](image)

- **HCP** prefix (ex. **HCP001**)
- Includes HCP compensation plan data by employee & DeptID level
- Report repository updates every three hours with **Saved** changes made in Human Capital Planning (HCP) tool
- Check out the **Compensation Reporting By Employee in HCPRptg** job aid for more details
Logging Into HCP

We will now complete Exercise 1
HCP Exercise Workbook
LOG IN & RUN HCPO01
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 for employee and position Compensation Planning of your current year’s Forecast and next year’s Operating Budget.
Logging Into HCP

We will now complete

Exercise 2
HCP Exercise Workbook
LAUNCH PLANNING
& SET ENTITY
Agenda

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<table>
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<td>New Positions</td>
<td>Planner Created</td>
<td>Cleared from HCP and refreshed with active vacant positions</td>
</tr>
<tr>
<td>To Be Hired Positions</td>
<td>Planner Created</td>
<td>Cleared from HCP</td>
</tr>
<tr>
<td>Pooled Positions</td>
<td>Planner Created</td>
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</tr>
<tr>
<td>DeptID Adjustments</td>
<td>Planner Created</td>
<td>Cleared from HCP for both FY17 Forecast and FY18 Operating Budget</td>
</tr>
</tbody>
</table>
Manage Existing Employees and Positions (MEEP) Form

Data in the Manage Existing Employees and Positions form refreshed from HCM on 2/08/17
HCP Manage Existing Employees & Positions Form

- Lists employees alphabetically by last name for all active employees with a Planning Home Department (PHD) for the MyOrg selected in My Preferences.
  - *HCP only refreshed with REG, RG1, PRT, SLN, SLR distribution salary. If an employee is paid from a different salary distribution type, they will not display in HCP.*
- Displays both **FY17 Forecast** and **FY18 Operating Budget** plan data
- Read-only form, editable by right-clicking
## Manage Existing Employees and Position (MEEP) Read-Only 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 <em>(DFL Access)</em></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</td>
<td>Read Only, dynamically impacted by any HCP edits to: edit FTE, Salary, Distribution, Appt Start &amp; End Dates</td>
</tr>
<tr>
<td></td>
<td>each component’s effective dates</td>
<td></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](http://budget.berkeley.edu/calplanningreleasenotesfeb16) for more details**
HCP Planning Home Department (PHD) was sourced from employee’s Level 7 Department in HCP

Planning Home Department Lookup allows planners to identify the HCP PHD for all active employees when trying to:
- Locate an employee not displaying on your Manage Existing Employees & Positions form
- Review the costing of an Employee split across departments *(planners only have visibility in HCM to the budgets for the distributions in their MyOrg access)*

- Enter employee name into Member field
- Click the green right arrow to search for the employee and their PHD
Planning Home Department (PHD)

• **CalPlanning Access Providers** for each unit will have access to change the Planning Home Department of employee(s) in your MyOrg

• Task List provided that allows users to update Planning Home Department

• Work with you CalPlanning Access Provider to request
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.
Navigating HCP MEEP Form

Right-Click to Navigate into Employees

- Locate the row containing the employee you would like to review. MEEP form sorted Alpha by employee last name.
- Mouse over the Entity column in that row to display the right-pointing black arrow and right click to display the navigation box.
Navigating into HCP Forms

- HCP links multiple forms from within each task.
- Planners can navigate to forms using:
  - **Right Click Navigation** is sensitive to cell, row, and column placement, and will generate specific menu actions applicable to that location.
  - **Breadcrumbs or Footprints** are clickable trails that provides a path to where you are currently located within forms, and active links back to each forms.
Appointment Dates on Manage Existing Employees & Positions Form

MEEP form highlights **Appointment Start** and **Appointment End** dates for employees who are **NOT** planned for the full budget cycle range:

- Start Dates **after** 7/01/16
- End Dates **before** 6/30/18
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)
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. Making Changes via the Employee Mass Update Form
6. Mass Extending Employee End Dates
7. Planning for a New Position with a To Be Hired Employee
8. Planning Pooled Positions
9. Planning Compensation Expenses at the DeptID
10. Post Training Support
The **HCP Employee Mass Update** form allows planners to edit planned
- Appointment start and end dates
- Salary expense rates
- Full time equivalent (FTE)
- Distributed expenses

for **multiple employees** from a single form
Agenda

1. Introduction to Compensation Planning and Human Capital Planning
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10. Post Training Support
Mass Extended Appointment Dates

- Most HCP appointment end dates have been automatically extended
- 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 12/31/2016 were extended
- Extension of 12/31/2099 applied to appointment, salary, FTE and distribution end dates
- HCP highlights start and end dates of employees who are NOT planned for the full budget cycle range
- **HCM End Date** is now available for viewing in the Employee Status form
When to Extend Appointments

Your HCP 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**
Benefit of Mass Extend Form

HCP Mass Extend allows planners 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 all at the same time
We will now complete

**Exercise 7**

HCP Exercise Workbook
## Status of HCP Positions and DeptID Adjustments as of 2/08/17

<table>
<thead>
<tr>
<th>HCP Data Type</th>
<th>Prior to 2/08/17 Data Refresh</th>
<th>After 2/08/17 Data Refresh</th>
</tr>
</thead>
<tbody>
<tr>
<td>Single Incumbent, Shared Employees and Positions</td>
<td>HCM data loaded in January 2016, planner re-forecasted until 1/31/17</td>
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<tr>
<td>New Positions</td>
<td>Planner Created</td>
<td>Cleared from HCP and refreshed with active vacant positions</td>
</tr>
<tr>
<td>To Be Hired Positions</td>
<td>Planner Created</td>
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<tr>
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<td>DeptID Adjustments</td>
<td>Planner Created</td>
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</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 x 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
Introduction to Compensation Planning and Human Capital Planning

Key HCP Concepts

Understanding my Employee and Position Data

Managing Existing Employees and Positions

Making Changes via the Employee Mass Update Form

Mass Extending Employee End Dates

Planning for a New Position with a To Be Hired Employee

Planning Pooled Positions

Planning Compensation Expenses at the DeptID

Post Training Support
Pooled Positions

DeptID Student Titles/Undergrad

- 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 Titles:
- GSR
- GSI
- Per Diem
- Summer Salary
- Lecturer
- Visiting Prof
- Teacher
- UNEX
### Pooled Position Types

<table>
<thead>
<tr>
<th>Position Type</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>
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</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>

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
### Status of HCP Positions and DeptID Adjustments as of 2/08/17

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</tbody>
</table>
Manage HCP Pooled Positions using BAIRS Reports

• 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
Pooled Position Planned Expense

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.

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

Begin & End Dates drive when/how to distribute expense

Pooled Position Compensation Expense

$ @ DeptID
Planning a Pooled Position
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
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6. Mass Extending Employee End Dates
7. Planning for a New Position with a To Be Hired Employee
8. Planning Pooled Positions
9. Planning Compensation Expenses at the DeptID
10. Post Training Support
DeptID Compensation Adjustments Form

• Use to plan Compensation Earnings at the DeptID level (L7) vs. employee

• +/- adjustment are charged against compensation accounts at the DeptID level

• Input value automatically spreads evenly over 12 months

• Previously planned FY17 Forecast DeptID Adjustment were REMOVED during annual HCM to HCP refresh and not copies to FY18 Operating Budget

• Create as needed for current Forecast and next year’s Operating Budget
Scenario Selection Required with DeptID Adjustments

DeptID Adjustment form, unlike other HCP forms requires planners to select the Point of View for:
• Scenario
• Version
• Fiscal Year
## Status of HCP Positions and DeptID Adjustments as of 2/08/17

<table>
<thead>
<tr>
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</thead>
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<tr>
<td>and Positions</td>
<td></td>
<td></td>
</tr>
<tr>
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<td>DeptID Adjustments</td>
<td>Planner Created</td>
<td>Cleared from HCP for both FY17 Forecast and FY18 Operating Budget</td>
</tr>
</tbody>
</table>
Right-click the DeptID to manage Compensation Adjustments
Use review forms to see your data in mass, and to locate and find your employee information.

- **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
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>1_10534 - BAHSB Acad Faculty Gen Ops</td>
</tr>
<tr>
<td>1_10537 - BAHSB Acad Student Employees</td>
<td>1_10537 - BAHSB Acad Student Employees</td>
</tr>
<tr>
<td>2nd Distribution</td>
<td>1_10537 - BAHSB Acad Student Employees</td>
</tr>
<tr>
<td>1_10535 - BAHSB Temporary Instruction</td>
<td>1_10535 - BAHSB Temporary Instruction</td>
</tr>
<tr>
<td>2nd Distribution</td>
<td>1_10535 - BAHSB Temporary Instruction</td>
</tr>
<tr>
<td>1_10187 - BAHSB Devel Alumni Relations</td>
<td>1_10187 - BAHSB Devel Alumni Relations</td>
</tr>
<tr>
<td>3rd Distribution</td>
<td>1_10187 - BAHSB Devel Alumni Relations</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>1_10534 Prior Position 68</td>
<td>Adjunct Professors</td>
<td>Adjunct Professors_10534</td>
</tr>
<tr>
<td>1_10535 Prior Position 194</td>
<td>Visiting Professors</td>
<td>Visiting Professors_10535</td>
</tr>
<tr>
<td>1_10314 Prior Position 154</td>
<td>Reader/Tutor - Student</td>
<td>Readers_10314 (25%+)</td>
</tr>
<tr>
<td>1_10249 Prior Position 141</td>
<td>Reader/Tutor - Student</td>
<td>Tutors_10249 (&lt;12.5%)</td>
</tr>
<tr>
<td>1_10292 Prior Position 152</td>
<td>Reader/Tutor - Student</td>
<td>Tutors_10292 (20-24%)</td>
</tr>
<tr>
<td>1_10210 Prior Position 133</td>
<td>GSR - Resident</td>
<td>GSRs_10210 (25%+)</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
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. Making Changes via the Employee Mass Update Form
6. Mass Extending Employee End Dates
7. Planning for a New Position with a To Be Hired Employee
8. Planning Pooled Positions
9. Planning Compensation Expenses at the DeptID
10. Post Training Support
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://calplanning.berkeley.edu
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)
Appendix
Element & Budget Item Dimensions

- 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.
## FY17 & FY18 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>
## Composite Benefit Rates

### UCB Composite Benefit Rates (effective 7/1/2016)

<table>
<thead>
<tr>
<th>CBR Rate Group</th>
<th>Approved</th>
<th>FY17</th>
<th>FY18</th>
<th>FY19</th>
<th>FY20</th>
<th>FY21</th>
<th>FY22</th>
</tr>
</thead>
<tbody>
<tr>
<td>Academic</td>
<td></td>
<td>39.0%</td>
<td>40.0%</td>
<td>40.0%</td>
<td>40.0%</td>
<td>40.0%</td>
<td>40.0%</td>
</tr>
<tr>
<td>Staff</td>
<td></td>
<td>46.0%</td>
<td>48.0%</td>
<td>48.0%</td>
<td>48.0%</td>
<td>48.0%</td>
<td>48.0%</td>
</tr>
<tr>
<td>Limited</td>
<td></td>
<td>17.0%</td>
<td>19.0%</td>
<td>19.0%</td>
<td>19.0%</td>
<td>19.0%</td>
<td>19.0%</td>
</tr>
<tr>
<td>Students (Graduate and Undergraduate)</td>
<td></td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
</tr>
</tbody>
</table>

[http://www.spo.berkeley.edu/policy/benefits/benefits.html](http://www.spo.berkeley.edu/policy/benefits/benefits.html)