sHCP Demonstration

FY2018-19
Agenda

1. Compensation Planning Components
2. Human Capital Management (HCM) Data in HCP
3. sHCP: Employees & To Be Hired Employees
4. sHCP: Pooled Positions
5. sHCP: DeptID Compensation Adjustments
6. sHCP: BFS Journals Review, Mass Salary Adjustment and Monthly Pay Rate LookUp
7. HCPRptg the big picture view
8. FY2018-19 Office Hours
How do we categorize our employees for compensation planning?

- **Employees** – the current roster of employees who are funded from your DeptIDs
- **To Be Hired Employees** – placeholders for employees you plan to hire in the future who will be funded from your DeptIDs
- **Pooled Positions** – groups of highly variable employees in job codes with seasonal fluctuation who are funded from your DeptIDs
Compensation Planning Key Concepts

Employee Salary

• **Monthly Pay Rate** represents the amount of money employees are paid for a full-time month of work.

• **Earnings Distribution** defines the planned salary funding distribution by Entity, Account, Fund and CF1 in HCP. The Distribution % serves as the ~proxy FTE in HCP.

• **Full Time Equivalent (FTE) unit** indicates the *workload* of an employee in a way that makes workloads comparable across various contexts. An FTE of 1.0 is equivalent to a full-time employee, while an FTE of 0.5 signals half of a full work week.

• **Salary Expense** auto calculated product of the Monthly Pay Rate * the Earnings Distribution % or ~proxy FTE in HCP.

Employee Benefits

• **Composite Benefits Rate (CBR)**

• **Fee Remission**
  • Graduate students who hold academic appointments may be eligible for an award for tuition &/or fees awarded by the university.
  • The amount of the fee remission students may be eligible for depends on the type of appointment that is held during the current semester.

• **General Auto & Employee Liability Insurance (GAEL)**
  • Covers earthquake, cyber, and premium liability coverage mandated by the UC Office of the President
  • Charged and budgeted as a percentage of salary
Composite Benefits Rate (CBR)

CBR

• Charged and budgeted as a percentage of salary
• Rates include most, but not all, costs traditionally known as fringe benefits
• Excluded costs are
  • Graduate Student Health and Fee Remissions
  • GAEL
  • Vacation Accrual
  • All other costs in account series 52XXX

Want to know more? You can read more about CBR on the Berkeley Sponsored Projects website, [https://spo.berkeley.edu/policy/benefits/benefits.html](https://spo.berkeley.edu/policy/benefits/benefits.html)
HCP Dimension Members

Dimensions define how data is organized within the CalPlanning tools. Here are the dimension members available to work with in HCP. The members in grey font are read only in HCP and the black font are editable.

- **Year**
  - FY18
  - 2018
  - 2019

- **Scenario**
  - Forecast
  - Working

- **Version**
  - Working

- **Period**
  - YearTotal
  - Jul to Jun (closed months)
  - Jul to Jun (open months)

- **Entity**
  - 1_26301

- **Account**
  - A40XXX

- **Fund**
  - 5 Plan Only Fund Members

- **Chart1**
  - C1_SUMPLN

- **Employee**
  - E12345678
  - Examples
    - Carol Christ
    - Saul Perlmutter

- **Job Code**
  - 0213
  - Examples
    - 1100_Professor-Acad Yr
    - 4722_Assistant III
    - 7709_Financial Analyst 3

- **Examples**
  - 1_EVCP3
  - 1_10135
  - 1_HAAS3
  - 1_10372
  - 1_COCHM
  - 1_10965

- **Account Examples**
  - Compensation & fringe accounts
    - Total Compensation Expenses
      - A50211
      - A50212
      - 53070

- **Fund**
  - Current Funds
    - Unrestricted-Plan
    - Designated-Plan
    - Restricted Gifts-Plan
    - Restricted Endowments
    - and FFEs – Plan
    - Contracts and Grants – Plan

*Dimension label not displayed on forms*
HCP Employee & Job Code Dimensions

- Existing employees were fed from HCM along with their Employee ID, Job Code and Earnings Distribution(s)
- Member name for existing employees = E + Employee ID
- Plans for new or To-Be-Hired (TBH) employees can be created in HCP to capture their compensation expenses in your budget

- Job Code – the alpha suffix + job code description
- Fed from HCM
- Determines Salary Account in the Earnings Distribution
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.

**compensation includes fee remission
HCM Employee Data Refreshed in HCP

A snapshot of Human Capital Management (HCM) data was taken on 2/06/18 EOB and includes all active employee data on and after 7/01/17. This data is available in HCP when we re-opened CalPlanning on 2.22.18.

<table>
<thead>
<tr>
<th>HCM</th>
<th>HCM Snapshot As of 2.07.18</th>
<th>HCP Planned Employee &amp; Job Code Compensation Expenses</th>
</tr>
</thead>
<tbody>
<tr>
<td>(Actual Employee and Job Code data)</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Employee Data</strong> (excluding those in the 12 Pooled Position Job Codes)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Name</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Employee ID</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Job Code</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Monthly Pay Rate</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Earnings Distributions</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Employee Data</strong> refreshed on the Manage Existing Employees &amp; Job Codes forms</td>
<td>Loaded</td>
<td></td>
</tr>
<tr>
<td><strong>Employee Data</strong> for Employees in the 12 Pooled Types — (e.g. GSR/GSI, Summer Salary)</td>
<td>(Not Refreshed)</td>
<td></td>
</tr>
<tr>
<td><strong>Pooled Positions</strong> — Planner created and manage ongoing</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Additional Compensation</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>DeptID Compensation Adjustments</strong> — Planner created</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### HCM -> HCP

**HCM -> HCP**  
(land of active employee data in HCM as of 2.6.18)

<table>
<thead>
<tr>
<th>Employees</th>
<th>Active Employees’ data loaded and extended through FY19. No Position data.</th>
</tr>
</thead>
<tbody>
<tr>
<td>To Be Hired</td>
<td>No Vacant Position information loaded.</td>
</tr>
<tr>
<td>Pooled Employees</td>
<td>No employee data loaded for the active employees in one of the <strong>12 Pooled</strong> types.</td>
</tr>
<tr>
<td>DeptID $ Adjustments</td>
<td>No additional compensation information loaded.</td>
</tr>
</tbody>
</table>
HCM Data Flows to HCP

• Only REG earnings distribution lines are loaded into HCP from HCM
• To plan for other earnings codes not loaded from HCM, planners can manually enter them into HCP via
  • Adjusting the employee’s monthly pay rate if additional earning funded from the same earnings distribution, IF material
  • If funded from a different earnings distribution, planners can use DeptID Compensation Adjustment in account 520XX-Other Employee Compensation – Plan or any other available compensation account
Agenda

1. Compensation Planning Components
2. Human Capital Management (HCM) Data in HCP
3. sHCP: Employees & To Be Hired Employees
4. sHCP: Pooled Positions
5. sHCP: DeptID Adjustments
6. sHCP: BFS Journals Review, Mass Salary Adjustment and Monthly Pay Rate LookUp
7. HCPRptg
8. FY2018-19 Office Hours
Accessing HCP App – Where Is It?

HCP is now a stand alone application!
Jan18HCP

Planners can view their FY18 Forecast values prior to the February 2018 HCM refresh in HCP via the read-only Jan18HCP.

Jan18HCP application design reflects the old pre-simplified HCP look which will be unfamiliar to new planners.
Setting your HCP Entity Member Preferences

🤔 What entity level do you prefer?

Entity preferences are application specific and must be set for both CalPlan and HCP.
sHCP Task List

Old
HCP Task List

What’s gone?
What’s new?

simplified
HCP Task List

sHCP Demonstration
February 2018
What do we need to plan for our Employees and To Be Hired employees?

- Monthly Reg Salary
- Earnings Distribution by
  - Entity
  - Salary Account (Job Code)
  - Fund
  - CF1
- Distribution % ~ proxy FTE
- Benefits (Salary Account)

Employees

To be Hired

- Same as for Employees but planners need to provide as details not fed from HCM
- + Start & End Month
Calculating **Planned** Salary & Compensation Expenses in HCP

To calculate an employee’s Salary Expense HCP needs a Pay Rate + Earnings Distribution

\[
\text{Employee Planned Pay Rate in Month} \times \text{Earnings Distribution} = \text{Salary Expense}
\]

- Planned in Month
- Employees can have multiple distributions

\[
\text{Salary Expense} \times (1 + \text{CBR\%} + \text{GAEL\%}) = \text{Total Compensation Expense}
\]

In HCP Compensation Expenses (including benefits) are planned to Entity, Account, Fund, and Chart1 using planned distributions (simplified) by employee.

On the General Ledger Compensation Expense are dispersed to Entity, Account, Fund, Chart1, Chart2 and Program Code using actual distributions (detailed) and do NOT include actual benefits at the employee level. Employee Benefits are consolidated by chartstring.
Manage Existing Employees & Job Codes Task

Five Existing Employee tabs
- Monthly Pay Rate - editable
- Distributions - editable
- Salary Expense – calculated RO
- Benefits – calculated RO
- Total Comp – calculated RO
Manage Existing Employees & Job Codes:
1. Monthly Pay Rate Tab Layout

How is this different than the old HCP Manage Existing Employees and Positions form?
Manage Existing Employees & Job Codes:

1. Monthly Pay Rate Form Details

• Includes all active employees with an earnings distribution funded within the Entity set in My Preferences, displayed alphabetically by last name with Job Code, description and Entity.
• Features current year’s Forecast and next year’s Operating Budget Working versions. Scenario and version labels not displayed in column headers.
• Displays editable open months of current year Forecast, 12 months of next year’s Operating Budget (+ read-only Year Total) and Comments for both scenarios.
• Current and future months are editable for Monthly Pay Rate. No need to right-click.
• Right-click to manage Employees and To Be Hired employees, to change Job Code, DeptID entity.
Manage Existing Employees & Job Codes: 2. Distributions Tab Layout

Employee’s total monthly Distribution (~proxy FTE) not to exceed 1

Why no Year Total Average for FY18?

Editable open months of FY18 Forecast Working

12 editable months of FY19 Operating Budget Working + Year Total Average

Red cell fill highlights employee has no Distribution % (~proxy FTE) at end of FY
Manage Existing Employees & Job Codes:
2. Distributions Tab Details

• Includes all active employees with an earnings distribution funded within the Entity set in My Preferences, displayed alphabetically by last name with Job Code, Description and Earnings Distribution.
• Displays all earning distributions for an employee planned to your entity.
• Features open months of current year’s Forecast and next year’s Operating Budget Working versions. Scenario and version labels not displayed in column headers. (+ FY9 read-only Year Total Average)
• Editable open months of current year Forecast and 12 months of next year’s Operating Budget Current and future months are editable for adding Distributions. To remove a distribution, zero out existing by month and right click to add a new distribution if needed.
• Right click to change Fund and/or CF1
• To change the Job Code and/or the DeptID entity you must execute on the Monthly Pay Rate tab and also on the Distribution tab.

Hmmm......
Manage Existing Employees & Job Codes:

3. Salary Expense Tab

- Read-Only (RO), calculated fields include Year Total ★ and 12 months of FY18 Forecast & FY19 Operating Budget
- Actual Salary Expense in Closed Months feeds from GL
- Planned Salary Expense in Open Months Calculated = Monthly Pay Rate * Earnings Distribution

- Gray filled cells = FY18 Actual from GL
- Green filled cells = FY18 Forecast

- Blue filled cells = FY19 Operating Budget
Manage Existing Employees & Job Codes:

4. Benefits Tab

Form displays read-only calculated applicable Benefits Account and GAEL amounts for open months of FY18 Forecast and planned 12 months of FY19 Operating Budget as well as an FY19 Year Total.

- Green filled cells = FY18 Forecast
- Blue filled cells = FY19 Operating Budget

What actions can I take on the Benefits tab?
Manage Existing Employees & Job Codes:
5. Total Compensation Tab

Displays read-only calculated planned Total Compensation for FY19 Operating Budget by month and Year Total.

Blue filled cells = FY19 Operating Budget

🤔 *Why no FY18 Forecast on the Total Comp tab?*
Agenda

1. Compensation Planning Components
2. Human Capital Management (HCM) Data in HCP
3. sHCP: Employees & To Be Hired Employees
4. **sHCP: Pooled Positions**
5. sHCP: DeptID Compensation Adjustments
6. sHCP: BFS Journals Review, Mass Salary Adjustment and Monthly Pay Rate LookUp
7. HCPRptg the view to the big picture
8. FY2018-19 Office Hours
Pooled Positions

HCP Pooled Positions allow Planners to budget compensation expenses for fluctuating populations of employees using a single position.

- **sHCP** supports **one** Pooled Position per DeptID and Earnings Distribution intersection
- Once created Pooled Positions can be managed by adjusting:
  - Average Monthly Pay Rate
  - FTE
  - Headcount* (*valid for fee remission positions only)

### Departments

- **GSI***
  - DeptID
  - Earnings Distribution
- **Lecturer**
  - DeptID
  - Earnings Distribution
- **Teacher**
  - UNEX
  - DeptID Earnings Distribution
- **Visiting Prof**
  - DeptID
  - Earnings Distribution
- **GSR***
  - DeptID
  - Earnings Distribution
- **Student Titles** *(Undergrad)*
  - DeptID
  - Earnings Distribution
- **Summer Salary**
  - DeptID
  - Earnings Distribution
- **Per Diem**
  - DeptID
  - Earnings Distribution

---

*GSI* and *GSR* are specific to fee remission positions.
HCP Pooled Position Types

<table>
<thead>
<tr>
<th>12 Pooled 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>Summer Salary</td>
</tr>
<tr>
<td>Teacher – UNEX</td>
</tr>
<tr>
<td>Per Diem</td>
</tr>
<tr>
<td>Lecturer</td>
</tr>
</tbody>
</table>

HCM employee data for employees with job codes mapped to these 12 Pooled types are not loaded into HCP during the annual refresh.

- HCP Planners create Pooled Positions using the Pooled Types on the left
- Pooled Positions do not have individual employee detail
- Total FTE, NOT Headcount is used for calculating Total Salary Expense for the position.
- Headcount is only needed for calculating Fee Remission where applicable*
- Lecturer Pooled Position type does not include those employees with Security of Employment. They will appear in your employee list.
What do planners need to plan for Pooled Positions in HCP?

<table>
<thead>
<tr>
<th>Component</th>
<th>Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>Average Monthly Reg Salary</td>
<td>Planner Calculation</td>
</tr>
<tr>
<td>Earnings Distribution</td>
<td>Planner input</td>
</tr>
<tr>
<td>Entity</td>
<td>Planner Selected 🌟</td>
</tr>
<tr>
<td>Salary Account (Job Code)</td>
<td>Planner input</td>
</tr>
<tr>
<td>Fund</td>
<td>Calc from Planner selected Salary Account</td>
</tr>
<tr>
<td>CF1</td>
<td>Planner input</td>
</tr>
<tr>
<td>Distribution %</td>
<td></td>
</tr>
<tr>
<td>Benefits</td>
<td></td>
</tr>
<tr>
<td>FTE</td>
<td></td>
</tr>
<tr>
<td>Headcount (Fee Remission Eligible Job Codes)</td>
<td>Planner input</td>
</tr>
</tbody>
</table>
HCP Pooled Position Comp Accounts, CBR & Fee Remission FY18 & Planned FY19

In FY2018-19 planners are now free to choose which Comp Account they would like for their Pooled Position.

CBR/Fringe Benefit Accounts are mapped or defaulted to the Comp Accounts shown.

<table>
<thead>
<tr>
<th>HCP Pooled Position</th>
<th>Comp Account*</th>
<th>Comp Acct Desc</th>
<th>CBR/Fringe Account**</th>
<th>CBR/ Fringe Acct Desc</th>
<th>CBR Rate FY18</th>
<th>Fee Remission FY18</th>
<th>CBR Rate FY19^</th>
<th>Fee Remission FY19^</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adjunct Professors</td>
<td>A50240</td>
<td>Acad Teach-Regular (Default)-Pct</td>
<td>A53060</td>
<td>Benefit Assess-Academic Regular</td>
<td>40%</td>
<td>0</td>
<td>$8,546.00</td>
<td>0</td>
</tr>
<tr>
<td>GSI</td>
<td>A50241</td>
<td>Acad Teach-Exempt from CBR-Pct</td>
<td>A530XX_Stat</td>
<td>0</td>
<td>$8,546.00</td>
<td>0</td>
<td>$8,884.00</td>
<td>0</td>
</tr>
<tr>
<td>GSR - Non-Resident</td>
<td>A50211</td>
<td>Acad Nonteach-Exempt from CBR</td>
<td>A530XX_Stat</td>
<td>0</td>
<td>$16,867.00</td>
<td>0</td>
<td>$17,215.00</td>
<td>0</td>
</tr>
<tr>
<td>GSR - Resident</td>
<td>A50211</td>
<td>Acad Nonteach-Exempt from CBR-Pct</td>
<td>A530XX_Stat</td>
<td>0</td>
<td>$9,316.00</td>
<td>0</td>
<td>$9,664.00</td>
<td>0</td>
</tr>
<tr>
<td>Lecturer</td>
<td>A50240</td>
<td>Acad Teach-Regular (Default) (A50240)</td>
<td>A53060</td>
<td>Benefit Assess-Academic Regular</td>
<td>40%</td>
<td>0</td>
<td>$8,546.00</td>
<td>0</td>
</tr>
<tr>
<td>Per Diem</td>
<td>A51231</td>
<td>Staff-Exempt from CBR (A51231)</td>
<td>A530XX_Stat</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Reader/Tutor - Non-student</td>
<td>A50241</td>
<td>Acad Teach-Exempt from CBR</td>
<td>A530XX_Stat</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Reader/Tutor - Student</td>
<td>A50241</td>
<td>Acad Teach-Exempt from CBR</td>
<td>A530XX_Stat</td>
<td>0</td>
<td>$8,546.00</td>
<td>0</td>
<td>$8,884.00</td>
<td>0</td>
</tr>
<tr>
<td>Student Titles (Undergrad)</td>
<td>A51231</td>
<td>Staff-Exempt from CBR (A51231)</td>
<td>A530XX_Stat</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Summer</td>
<td>A50212</td>
<td>Acad Nonteach-Limited Benefits</td>
<td>A53080</td>
<td>Benefit Assess-Limited</td>
<td>16%</td>
<td>^ Planned 16%</td>
<td>16%</td>
<td>^ Planned 16%</td>
</tr>
<tr>
<td>Teacher - UNEX</td>
<td>A50211</td>
<td>Acad Nonteach-Exempt from CBR</td>
<td>A530XX_Stat</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

*FY2018-19 Planners are now free to choose which Comp Account they would like for their PP
**Mapped to the Comp Account
Create and Manage Pooled Positions:

1. Monthly Pay Rate Tab

Add a Pooled Position with a right-click.

FY18 Forecast
open months

FY19 Operating Budget
year total & month

Hey this layout is starting to look familiar!
Create and Manage Pooled Positions:
1. Monthly Pay Rate Tab Details

- Includes all planned Pooled Positions created with an earnings distribution funded within the Entity set in My Preferences,
- Displayed alphabetically by Pooled Position Type and DeptID.
- Features current year’s Forecast and next year’s Operating Budget Working versions. Scenario and version labels not displayed in column headers.
- Displays editable open months of current year Forecast, 12 months of next year’s Operating Budget (+ read-only Year Total) and Comments for both scenarios.
- Current and future months are editable for Monthly Pay Rate. No need to right-click.
- Right-click to manage Employees and To Be Hired employees.
Create and Manage Pooled Positions: 2. Distributions Tab

Right-click to manage Distributions for your Pooled Positions.

FY18 Forecast open months
FY19 Operating Budget year total and month
Create and Manage Pooled Positions:
3. Salary Expense Tab

FY18 Forecast
year total actualized (grey) and open (green) months

FY19 Operating Budget
by year total and month

Why are the closed months of FY18 Forecast blank?
Create and Manage Pooled Positions: 4. Benefits Tab

Form displays read-only calculated applicable Benefits Account and GAEL amounts for by Pooled Position Type for open months of FY18 Forecast and planned 12 months of FY19 Operating Budget as well as an FY19 Year Total.
Create and Manage Pooled Positions:
5. Total Compensation Tab

Why no FY18 Forecast on the Total Comp tab?
Agenda

1. Compensation Planning Components
2. Human Capital Management (HCM) Data in HCP
3. sHCP: Employees & To Be Hired Employees
4. sHCP: Pooled Positions
5. **sHCP: DeptID Compensation Adjustments**
6. sHCP: BFS Journals Review, Mass Salary Adjustment and Monthly Pay Rate LookUp
7. HCPRptg the view to the big picture
8. FY2018-19 Office Hours
DeptID Compensation Adjustments

- DeptID Adjustments allow for planning of +/- compensation expenses in HCP to capture material monthly $ amounts not reflected in employee and pooled positions plans
- Examples include stipends, vacancies and budget reductions
- Planned against compensation accounts at the DeptID (L7) vs. employee level
- Not to be used to plan for To Be Hired employees

- Monthly $ Amount
- Earnings Distribution by
  - Entity
  - Account
  - Fund
  - CF1
DeptID Compensation Adjustments:
1. Salary Expense Tab

- Editable open months of FY18 Forecast Working and 12 months of FY19 Operating Budget +Comments
- Open months of FY18 Forecast Working retained values as of 2.6.18
- No FY18 DeptID Adjustments copied into FY19

Why are there no DeptID Compensation Adjustments values in the FY19 Operating Budget?
DeptID Compensation Adjustments:
2. Benefits Tab

Form displays read-only Benefit and GAEL amounts calculated from Benefit Account rates defaulted to Salary Account on Salary Expense tab for open months of FY18 Forecast and planned 12 months of FY19 Operating Budget as well as an FY19 Year Total.
DeptID Compensation Adjustments: 3. Total Compensation Tab

<table>
<thead>
<tr>
<th>Entity</th>
<th>Fund</th>
<th>CF1</th>
<th>FY18</th>
<th>FY19</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Total Comp</td>
<td></td>
<td>Feb</td>
<td>Mar</td>
</tr>
<tr>
<td>1_12017 - CLLAW</td>
<td>Designated - Plan</td>
<td>C1 - Summary - Plan</td>
<td>1,412</td>
<td>1,412</td>
</tr>
<tr>
<td></td>
<td>Contracts and Grants C1 - Summary - Plan</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

FY18 Forecast

FY19 Operating Budget
Agenda

1. Compensation Planning Components
2. Human Capital Management (HCM) Data in HCP
3. sHCP: Employees & To Be hired Employees
4. sHCP: Pooled Positions
5. sHCP: DeptID Compensation Adjustments
6. sHCP: BFS Journals Review, Mass Salary Adjustment and Monthly Pay Rate LookUp
7. HCPRptg the view to the big picture
8. FY2018-19 Office Hours
Review BFS Journals:
1. Salary Expense
Review BFS Journals:
2. Fee Remission

![Fee Remission Table](image)
Review BFS Journals:

3. Benefits

4. Total Compensation
Mass Salary Adjustments Form:
1. Mass Salary Adjustment

Use the Mass Salary Adjustment form to edit Monthly Pay Rate and Distributions for employees from a planner created Job Code filtered list.

- Click drop down arrow to display Page Dimension dialog box
- Type Job Code into Member field
- Select desired Job Code from list displayed
- Click on green arrow to update form with list of employee with selected Job Code
Mass Salary Adjustments Form:
2. Distributions Tab

![Image of the Mass Salary Adjustments Form showing the Distributions Tab](image-url)
Mass Salary Adjustments Form:

3. Salary Expense

<table>
<thead>
<tr>
<th>Employee</th>
<th>Entity</th>
<th>Salary Account</th>
<th>Fund</th>
<th>CF1</th>
<th>FY19</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Account</td>
<td></td>
<td></td>
<td>YearTotal</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

4. Benefits Tab

<table>
<thead>
<tr>
<th>Employee</th>
<th>Entity</th>
<th>Salary Account</th>
<th>Fund</th>
<th>CF1</th>
<th>FY19</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Account</td>
<td></td>
<td></td>
<td>YearTotal</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Monthly Pay Rate Lookup

Monthly Pay Rate LookUp form allows planners to search for employees in HCP to view their monthly planned pay rate as displayed in HCP. Form populates with RO values for the open months of current Forecast and next year’s Operating Budget.

- Click drop down arrow to display Page Dimension dialog box
- Type employee’s last name into Member field
- Select desired employee from list displayed
- Click on green arrow to update form with employee’s planned monthly pay rate
### simplified HCP

<table>
<thead>
<tr>
<th>HCM -&gt; HCP</th>
<th>simplified HCP</th>
</tr>
</thead>
<tbody>
<tr>
<td>(load of active employee data in HCM as of 2.6.18)</td>
<td>this year only</td>
</tr>
<tr>
<td><strong>Employees</strong></td>
<td><strong>Active Employees’ data</strong> loaded and extended through FY19. No Position data.</td>
</tr>
<tr>
<td><strong>To Be Hired</strong></td>
<td>No Vacant Position information loaded.</td>
</tr>
<tr>
<td><strong>Pooled Employees</strong></td>
<td><strong>No employee data</strong> loaded for the active employees in one of the 12 Pooled types.</td>
</tr>
<tr>
<td><strong>DeptID $ Adjustments</strong></td>
<td>No additional compensation information loaded.</td>
</tr>
</tbody>
</table>
**What’s in my Forecast & Operating Budget?**
Scenarios, Versions, Actualizing & Seeding

**CalPlanning**
Thursday, February 22, 2018

<table>
<thead>
<tr>
<th>FY18 Forecast Working</th>
<th>FY19 Operating Budget Working</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>HCP Comp</strong></td>
<td></td>
</tr>
<tr>
<td>Actuals</td>
<td>Actuals + Forecast</td>
</tr>
<tr>
<td>• Forecast refreshed</td>
<td>• Operating Budget with refreshed HCM data</td>
</tr>
<tr>
<td>with HCM data</td>
<td>• + 3% Monthly Pay Rate*</td>
</tr>
<tr>
<td>• Converted Pooled</td>
<td>• Converted FY18 Pooled Positions</td>
</tr>
<tr>
<td>Positions</td>
<td></td>
</tr>
<tr>
<td>• DeptID Adj from Old</td>
<td></td>
</tr>
<tr>
<td>HCP FY18 Forecast</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>CalPlan EBC</strong></td>
<td>FY18 July – Jan Actuals</td>
</tr>
<tr>
<td>Actuals</td>
<td>Operating Budget copied from actualized months of FY18 Forecast (FY18 July – Jan Actuals)</td>
</tr>
<tr>
<td>Forecast</td>
<td>• Beginning balance = FY18 Forecast Working ending balance</td>
</tr>
<tr>
<td>Central transfers</td>
<td>• Campus support accounts (and A75101) from PermBudget and commitments data</td>
</tr>
<tr>
<td>accounts updated</td>
<td></td>
</tr>
<tr>
<td>from commitments data</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Operating Budget copied from open months of FY18 Forecast (FY18 Feb – Jun)</td>
</tr>
<tr>
<td></td>
<td>Operating Budget seeded by FY18 Actuals + Forecast</td>
</tr>
</tbody>
</table>

*no increase July-Sept, 12% increase applied to Oct 2018, 3% there after
## Converging Processes

<table>
<thead>
<tr>
<th>HCM -&gt; HCP</th>
<th>FY18 Forecast copied to FY19 Operating Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td>Active Employees’ data loaded and extended through FY19. No Position data</td>
<td>Active Employees’ data relevant to FY19 loaded with 3% * to Monthly Pay Rate. End dates extended to 6/31/19 for all employees unless they ended on or before 12/31/18 or were contract employees.</td>
</tr>
<tr>
<td>Monthly pay rate and earnings distribution &amp; % (proxy ~FTE) at the month level now editable. NO right clicking!</td>
<td></td>
</tr>
<tr>
<td>No Vacant Position information loaded.</td>
<td>All planned To Be Hired employees in FY18 Forecast Working prior to 2.7.18 were deleted. No planned To Be Hired employees to copy to FY19.</td>
</tr>
<tr>
<td>No more Vacant Positions</td>
<td></td>
</tr>
<tr>
<td>Create To Be Hired employees as needed.</td>
<td></td>
</tr>
<tr>
<td>Pooled Positions now limited to one type per intersection. If more than one per intersection existed in prior HCP they were consolidated and need Planner review.</td>
<td>Copied consolidated Pooled Positions to FY19 and need Planner review.</td>
</tr>
<tr>
<td>No employee data loaded for the active employees in one of the 12 Pooled types.</td>
<td></td>
</tr>
<tr>
<td>Annualized DeptID Adjustment $ in the FY18 Forecast Working prior to 2.6.18 were loaded into the open months of FY18. Closed months actualized with zero.</td>
<td>FY18 DeptID Adjustment $s NOT copied to FY19.</td>
</tr>
<tr>
<td>No additional compensation information loaded.</td>
<td></td>
</tr>
</tbody>
</table>

*no increase July-Sept, 12% increase applied to Oct 2018, 3% there after

\*Annual process
Agenda

1. Compensation Planning Components
2. Human Capital Management (HCM) Data in HCP
3. shCP: Employees & To Be Hired Employees
4. shCP: Pooled Positions
5. shCP: DeptID Adjustments
6. shCP: BFS Journals Review, Mass Salary Adjustment and Monthly Pay Rate LookUp
7. HCPRptg the big picture view
8. FY2018-19 Office Hours
CalPlanning: Enabling Reporting POV Preview

Updating Your Reporting Preferences

As of 2/22/18, to enable the **POV Preview Box to display** when running a report from the CalPlan, CalRptg and HCPRptg repositories you will need to set your CalPlanning preferences as shown here:

- From the CalPlanning **Navigate** toolbar select **File -> Preferences**
- From the **Preferences** left-hand navigation pane select **Financial Reporting**
- From the **User Point of View** set **Preview** to **On** and select **OK**
- Log out of the **CalPlanning Workspace** and log back in to apply setting

Once enabled the **POV Preview** setting will persist.
HCP001 – Employee Salary by Fund and Job Code
Use to review plans by one compensation account at a time created in HCP after the simplification of HCP (FY18 Forecast Working and later) where we planned by employee and job code. The report displays the Job Code # and description along with the employee name and employee ID.

HCP001 – Prior Feb 2018 sHCP – Employee Salary by Fund and Position
Run to view plans by one compensation account at a time created in HCP prior to the simplification when we planned by employee and position. The report displays the Position number along with the employee name and employee ID.

HCP002 – Comp and Non-Comp Expense Variance – Scenario vs Actual displays detailed salaries and non-comp expenses planned vs. actuals

HCP002- Prior Feb 2018 sHCP Comp and Non-Comp Expense Variance – Scenario vs Actual

HCP003- Job Code Trend by Actual Payroll $ and FTE presents actual payroll FTE for one compensation account for 5 prior fiscal years by Job Codes
FY18 Forecast Working HCP001 Report
Displays list of employees and Pooled Position funded by Entity selected in POV
Reflects plan data post February 2018 HCM to HCP refresh and simplification of HCP

Job Codes & Descriptions

Pooled Position Type
HCP001, Employee Salary by Fund and Job Code Report

Report POV

Check the Edit Member Names box to type directly into Account Prompt

While the Member Selection box will allow for multiple accounts in the Selected section, do not include more than one.

Report Account Prompts

Click on the Go to Member Selection magnifying glass to choose from the list of available Compensation Accounts.

Use the left and right arrows to move members from the Selected to the Available sections.
Agenda

1. Compensation Planning Components
2. Human Capital Management (HCM) Data in HCP
3. sHCP: Employees & To Be Hired Employees
4. sHCP: Pooled Positions
5. sHCP: DeptID Adjustments
6. sHCP: BFS Journals Review, Mass Salary Adjustment and Monthly Pay Rate LookUp
7. HCPRptg
8. FY2018-19 Office Hours
FY2018-19 Budget Development Office Hours

Now Enrolling!

Come work on revising your FY2018 Forecast and FY2019 Operating Budget with the support of your CalPlanning trainer, the tech team, your peers and our campus budget process experts.

Enroll for one or more upcoming dates/times from the [CalPlanning training page](#). Bring any questions you have on completing your budgets in CalPlan and HCP for the 4/13/18 due date.

Bring your laptop to the sessions in University Hall, room 670. Computers provided in University Hall, room 28.

- Tuesday, March 6, 2018, 1:00 -3:00 pm, University Hall, room 670
- Thursday, March 8, 2018, 10:00 am-12:00 pm, University Hall, room 670
- Tuesday, March 13, 2018, 10:00 am-12:00 pm, University Hall, room 670
- Thursday, March 15, 2018, 2:00-4:00 pm, University Hall, room 670
- Tuesday, March 20, 2018, 1:00-3:00 pm, University Hall, room 28 - computers provided
- Friday, March 23, 2018, 10:00 am- 12:00 pm, University Hall, room 28 - computers provided
- Tuesday, March 27, 2018, 1:00-3:00 pm, University Hall, room 670
- Thursday, March 29, 2018, 1:00-3:00 pm, University Hall, room 670
Thank you!

Demo Evaluation