



# **DoD Civilian Acquisition Workforce Personnel Demonstration Project (AcqDemo)**

## **Sub-Panel and Compensation Management Spreadsheet (CMS) for Pay Pool Administrators**

**Presented by AcqDemo Program Office  
Fall - 2012**

- Housekeeping, Expectations and Parking Lot
- Course Objectives
- Course Agenda



At the completion of this course, participants will be able to

- Summarize the main functionalities of the Sub-Panel and Compensation Management (CMS) tools.
- Understand the structure of the Sub-Panel and CMS tools
- Understand the overall role of a Pay Pool Administrator
- Know when and how to make a “round trip” between Sub-Panel spreadsheet or CMS and CAS2Net
- Understand how to use the Sub-Panel and CMS tools when supporting a sub pay pool or a pay pool

# Overview of CAS2Net and CMS

- Oracle application called **CAS<sup>2</sup>Net**
  - Online @ <https://acqdemoii.army.mil>

### Master Database

- Used to update and maintain all pay pool personnel data, add and delete records, and record post-cycle activities
- Used to generate data files for import into the spreadsheet

### Appraisal and Sub-Panel Meeting Modules

- Used by first level supervisors to set scores and to input factor comments
- Used by second level supervisors in concert with first level supervisors to review scores (sub-panel meetings)
  - This can also be done in the Sub-Panel or CMS spreadsheet
- Used to print forms

Civilian Acquisition Workforce Personnel  
Demonstration Project, Department of Defense (DOD)

You are acting as Eric Hoang  
[Revert](#) | [Change Session](#) | [Logout](#)

## Employee Maintenance

### Employee Menu

[Contribution  
Planning](#)

[Mid-Point Review  
Self-Assessment](#)

[Annual Appraisal  
Self-Assessment](#)

[Reports](#)

### Superuser Menu

[Appraisal Status  
and Lock](#)

[Reports](#)

[Data Maintenance](#)

[Session  
Maintenance](#)

[Offline Interface](#)

[Paypool Notices](#)

[Demo Reset](#)

### Employee Maintenance Menu

[Modify/Delete employee record using query form](#)

[Modify/Delete employee record using quick pick list](#)

[Insert New Employee Record](#)

[Assign Supervisors to an Employee](#)

[Assign Employees to a Supervisor](#)

[Replace Supervisor Assignments](#)

[Replace PAS Code](#)

# CMS Spreadsheet Overview

- The spreadsheet is a Microsoft Excel workbook called **CMS 2012 v1.0.xls** consisting of 10 tabbed worksheets\*
  - The workbook may be downloaded from the Pay Pool Notices section of CAS2Net located at <https://acqdemoii.army.mil>. The workbook initially comes “empty” and must be populated with data by importing a file
  - CAS2Net, a database application written in Oracle, creates the import files. ***Any time a file is imported into the workbook, all existing data are cleared and replaced with data from the imported file***
- \* *Note that there is a version for Sub-Panels that will be introduced later*

## Compensation Management Spreadsheet

Cycle: 2012      Version: 1.0

*The purpose of this spreadsheet is to record appraisal scores and set basic pay rates and contribution-based financial awards.*

**Data/Spreadsheet Download** -- Download the data file from the website, then click on Import to load the file into this spreadsheet.

**Appraisal Score Entry** -- Once the file has been loaded, assign categorical and final scores for each factor, and view reports and graphs.

**Score Normalization** -- Compare score distributions to look for anomalies and scale differences. Run preliminary pay adjustment scenarios. Set CRI and CA parameters and assign pay outs to employees.

**Data Maintenance** -- All additions, deletions, and modifications must be done in the central database. All columns except for data entry and "wild-card" are locked. To preserve your work, export the data from this spreadsheet and upload to the central database before changing any information in the database.

**Final "G" Setting** -- This spreadsheet comes with a best estimate of "G." Once you have been notified that "G" is set, make a final round trip to CAS2Net. The final "G" value and related parameters will be included in the download of your payroll data.

**Final Compensation Setting** -- After the final round trip to update "G", finalize the pay adjustments and awards for your payroll.

**Data Upload** -- Use Export to create a file for uploading the results from your pay pool to the central database on the website.

**Generate Part 1's** -- First use the filters to select employees; sort data by preferred order; then click on the Generate Part I to generate Part I of the Appraisal Form for each selected employee.

### Paypool Data

[Import](#)   [View](#)   [Export](#)

Last Import:  
Last Export:  
Last Modified:

### Parameters

[Set CRI and CA Parameters](#)

### Summary Reports

[Rails Report](#)

[Career Path Factor Matrices ranked by Final Score](#)

[Summary Statistics of Delta OCS](#)

[Distribution of Delta OCS](#)

### Scatter-plots of OCS Score by Salary

[Current Pay & 2012 SPL](#)   [Inferred](#)   [New Pay & 2013 SPL](#)

### Part 1 of Appraisal Forms

[Open Existing Evaluation](#)

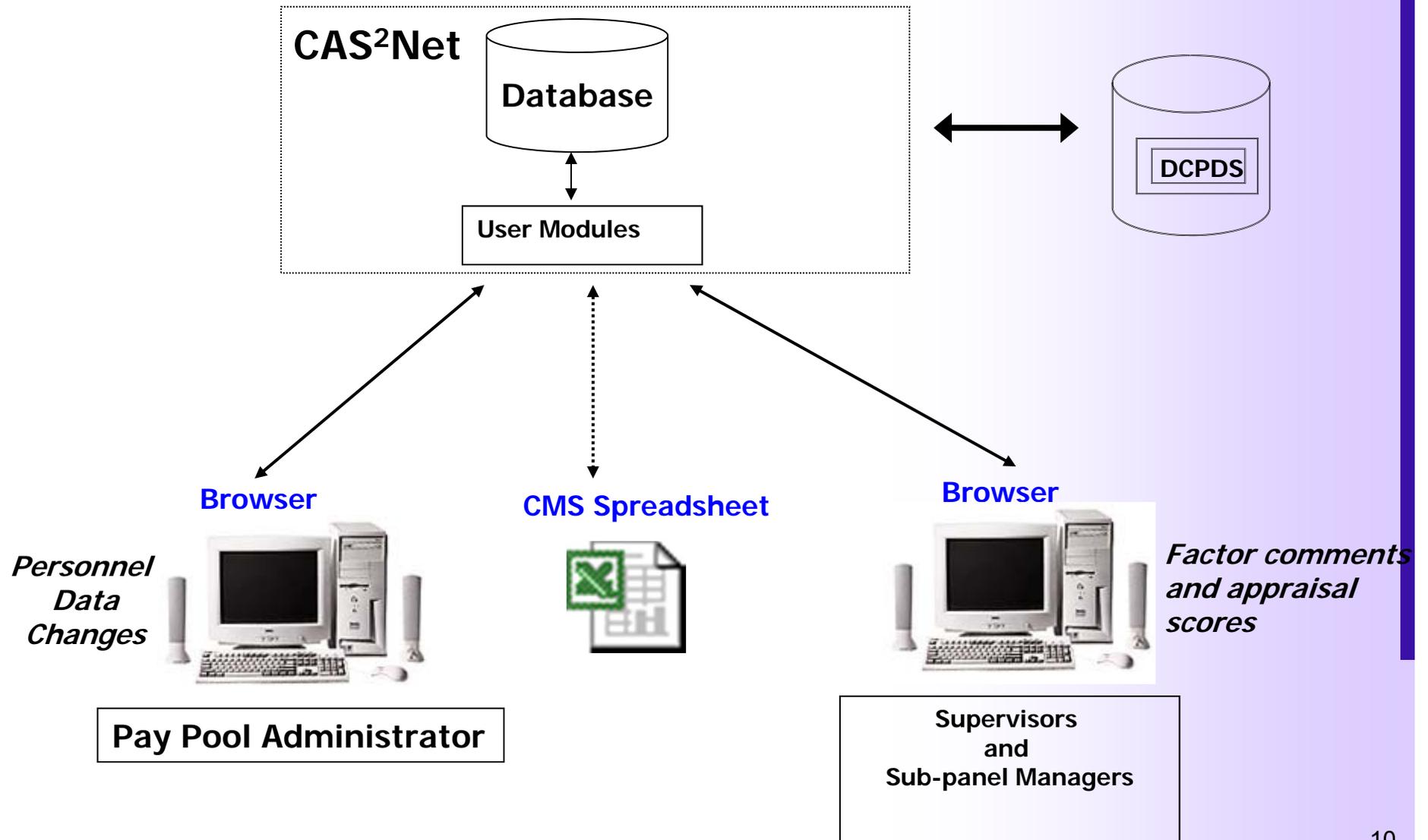
Generate Part 1 of Appraisal Form for selected individuals by sort order  
*Use the filters to select individuals then sort data by preferred order*

[Generate Part 1 of Appraisal Forms](#)

# CCAS Software Overview

- Sub-Panel Meeting Spreadsheet (MS Excel application)
  - Offline alternative for sub-panel to review/set scores for sub-panel
  - Spreadsheet is called Sub-Panel Meeting 2012 v1.0.xls
- CMS Spreadsheet (MS Excel application)
  - Review scores of entire pay pool
  - Used to set GPI, CRI, and CA compensation adjustments
  - Used to generate Part I of each employee's appraisal form
- Comma-delimited text files (.csv)
  - Used to pass data between the database and the two spreadsheets

# CCAS Software Architecture



## Sub Panel Spreadsheet Structure

### What it is:

- The sub-panel spreadsheet is a Microsoft Excel workbook called **Sub-Panel Meeting 2012 v1.0.xls**
- It is a tool to help supervisors rate their employees
- The sub-panel spreadsheet duplicates some of the functionality of the online assessment module

### What it is not:

- It is not used to determine compensation
- It does not generate Appraisal Forms

## The Sub Panel Spreadsheet Tabs

Tab	Description
1. Contents	Provides a brief description of the workbook, its purpose, and contents
2. Data	Is the main worksheet in the workbook
3. Matrix	Rank orders employees by individual factor score and by OCS
4. Rails	Provides counts and percentages of employees by rail position
5. Delta Stats	Displays Delta OCS averages and standard deviations
6. Delta Plot	Displays the data from the previous tab in graphical form
7. Cur OCS	Shows OCS vs. current (unadjusted) pay on top of the CY2012 SPL and rails
8. Inf OCS	Is identical to the previous one, except that inferred OCS is plotted instead of final numerical OCS

### Sub-Panel Meeting Spreadsheet

Cycle: 2012

*The purpose of this spreadsheet is to assign preliminary and final contribution scores to employees.*

**Data/Spreadsheet Download** -- Download the offline managers meeting data file from CAS2Net and save it to your hard drive, then click on Import to load the file into this spreadsheet.

**Appraisal Score Entry** -- Once the file has been loaded, click *View* to go directly to the Data tab to enter preliminary and final scores. To assign scores using an interface that is similar to the on-line Managers Meeting, click the *Group into Categories* link. This form filters employees by Career Path, Factor, and Score Level. For each score level (1 through 4) selected there will be between four and seven list boxes representing the available preliminary scores for that level plus boxes representing the upper and lower limits of the preceding and next levels, respectively. Employees without a preliminary score will show up in the *Unrated* listbox. Employees can be moved around in listboxes (left, right, up and down) and to/from the *Unrated* listbox using the buttons on the form. To assign a final score, double-click the employee's name.

**Data Maintenance** -- All additions, deletions, and modifications must be done in CAS2Net. All columns except for data entry and "wild-card" are locked. To preserve your work, export the data from this spreadsheet and upload to CAS2Net before changing any information in the database.

**Data Upload** -- Use Export to create a file for uploading the results from your pay pool to CAS2Net.

#### Paypool Data

[Import](#)

[View](#)

[Export](#)

Last Import: 9/13/2012 (9:49:12 AM)(CDT)

Last Export:

Last Modified:

#### Scores

[Group into Categories](#)

#### Summary Reports

[Rails Report](#)

[Career Path Factor Matrices ranked by Final Score](#)

[Summary Statistics of Delta OCS](#)

[Distribution of Delta OCS](#)

#### Scatter-plots of OCS Score by Salary

[Current Pay & 2012 SPL](#)

[Inferred](#)

- Provides a brief description of the workbook, its purpose and contents
- Appears first as you open the workbook and activate the macros
- Allows to import and export files and navigate around the workbook
- Displays the cycle year in the upper left corner just below the red title bar. The date and time of the last import and export of files into and out of the workbook are shown in the upper right corner

## Sub Panel Spreadsheet "Data" Tab

[Return to Main Menu](#)

Goto [Scores](#)

Blue arrows indicate fields set to filter the data.

Headings for wildcards.  
Select cell above heading, arrow down, and edit heading in formula bar.

Total CY 12 Base Pay = \$430,392

Last Name	First Name	Middle Initial	Suffix	CASANet ID	Paypool	Office Symbol	Wildcard 1	Presumptive Status?	Retained Pay?	Career Path	Broadband Level	Occ Series	CY2012 Base Pay	CY2012 Use This Base Pay	Locality Code	Previous OCS	Start Date	1st Level Sup Name
Sorenson	Sarah			36	AMC/LH	AMC/LHXSA		0	0	NH	3	1515	76,725	\$76,725	LA	76	1-Feb-99	Chris Babbitt
Tarman	Timothy			37	AMC/LH	AMC/LHXSA		0	0	NH	3	0340	76,725	\$76,725	LA		1-Feb-99	Chris Babbitt
Ulanov	Uli			38	AMC/LH	AMC/LHXSA		0	0	NH	2	0334	46,401	\$46,401			1-Feb-99	Chris Babbitt
Vinson	Violet			39	AMC/LH	AMC/LHXSB		0	0	NH	3	0343	76,725	\$76,725	LA		1-Feb-99	Eileen Daniels
Yeakley	Yolanda			41	AMC/LH	AMC/LHXSB		0	1	NH	3	0346	76,725	\$93,175	LA		1-Feb-99	Eileen Daniels
Hoang	Eric			2574	AMC/LH	AMC/LH		0	0	NJ	1	0332	24,837	\$24,837			1-Jun-11	Eileen Daniels

- Contains all of the data
- Is where individual contribution factor scores are recorded
- Has 3 yellow-colored "Wildcard" columns that let you enter your own data, formulas, etc.
- Includes built-in "Add-ins" support functionalities such as Validate, Clear Circles, Highlight, Hide/Unhide, Clear All Filters and Sort
- Has 2 links in the upper left corner: one to return to the Main Menu (Contents) and one to go to the Scores section of the Data tab (further right in the worksheet)

## Sub Panel Spreadsheet "Matrix" Tab

[Return to Main Menu](#)

[Return to Data](#)

### Factor Matrix

[All](#) [NH](#) [NJ](#) [NK](#)

Each list gives the name and integer score on the factor. Use the buttons to rank order the lists by integer score.

Rank Order  
Lowest to Highest

Rank Order  
Highest to Lowest

Rank Order  
Lowest to Highest  
by Broadband

Rank Order  
Highest to Lowest  
by Broadband

#### All Career Paths

2012 OCS				
NK	Williams	Wilson	2	34
NJ	Hoang	Eric	1	22
NH	Sorenson	Sarah	3	77
NH	Tarman	Timothy	3	68
NH	Ulanov	Uli	2	
NH	Vinson	Violet	3	58
NH	Yeakley	Yolanda	3	84

#### NH Career Path

Final Scores														
prb solving			team wk			cust ritns			leadership		comm			
Sorenson Sarah	3	74	Sorenson Sarah	3	74	Sorenson Sarah	3	76	Sorenson Sarah	3	77	Sorenson Sarah	3	82
Tarman Timothy	3	20	Tarman Timothy	3	91	Tarman Timothy	3	77	Tarman Timothy	3	49	Tarman Timothy	3	80
Ulanov Uli	2		Ulanov Uli	2		Ulanov Uli	2		Ulanov Uli	2		Ulanov Uli	2	
Vinson Violet	3	66	Vinson Violet	3	95	Vinson Violet	3	77	Vinson Violet	3	23	Vinson Violet	3	21
Yeakley Yolanda	3	87	Yeakley Yolanda	3	88	Yeakley Yolanda	3	75	Yeakley Yolanda	3	70	Yeakley Yolanda	3	90

- Rank orders employees by individual factor score and by OCS. Employees are identified by career path, last name, first name, and broadband
- Includes a sort order on scores (low to high or high to low) that may be done by broadband or across all broadbands
  - The order can be selected with the four buttons on the left
- Has links in the upper left corner to return to the Main Menu (Contents) worksheet or the Data worksheet

[Return to Main Menu](#)

## Rails Report

### Inferred

Rail Zone	NH		NJ		NK		Total	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
A	1	100.0%	0	N/A	0	N/A	1	100.0%
C1	0	0.0%	0	N/A	0	N/A	0	0.0%
C2	0	0.0%	0	N/A	0	N/A	0	0.0%
B	0	0.0%	0	N/A	0	N/A	0	0.0%
<b>Total</b>	<b>1</b>	<b>100.0%</b>	<b>0</b>	<b>N/A</b>	<b>0</b>	<b>N/A</b>	<b>1</b>	<b>100.0%</b>

### Definition of Rail Zone

Inappropriately compensated above the rails  
 Appropriately compensated between the rails > SPL  
 Appropriately compensated between the rails <= SPL  
 Inappropriately compensated below the rails

### Final

Rail Zone	NH		NJ		NK		Total	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
A	2	50.0%	0	0.0%	0	0.0%	2	33.3%
C1	0	0.0%	0	0.0%	1	100.0%	1	16.7%
C2	2	50.0%	0	0.0%	0	0.0%	2	33.3%
B	0	0.0%	1	100.0%	0	0.0%	1	16.7%
<b>Total</b>	<b>4</b>	<b>100.0%</b>	<b>1</b>	<b>100.0%</b>	<b>1</b>	<b>100.0%</b>	<b>6</b>	<b>100.0%</b>

### Definition of Rail Zone

Inappropriately compensated above the rails  
 Appropriately compensated between the rails > SPL  
 Appropriately compensated between the rails <= SPL  
 Inappropriately compensated below the rails

### Upper and Lower Rails

	GS-1 Step 1	SPL base	CCS	Upper Rail	Lower Rail	SPL
2012	\$17,803	1.0200427	min	\$19,613	\$16,707	\$18,160
			max	\$188,377	\$160,469	\$174,423

- Provides counts and percentages of employees by rail position
  - The first table shows rail position by career path based on **inferred** OCS, which is estimated from category scores
  - The second table shows rail position by career path based on **final, numerical** OCS
- Includes a link to the Main Menu (Contents) worksheet in the upper left corner
- Prints reports clicking on the printer icon in the Excel toolbar

## Sub Panel Spreadsheet "Delta Stats" Tab

[Return to Main Menu](#)

[View Delta OCS Distribution](#)

**Delta Plot Grouping**

Supervisor

Wildcard 1

**Summary Statistics of Delta OCS Score**

	Average Delta OCS Score	Standard Deviation	
<b>Overall</b>	-2.33	7.69	
<b>NH</b>	-4.50	8.58	
<b>NJ</b>	5.00	N/A	
<b>NK</b>	-1.00	N/A	

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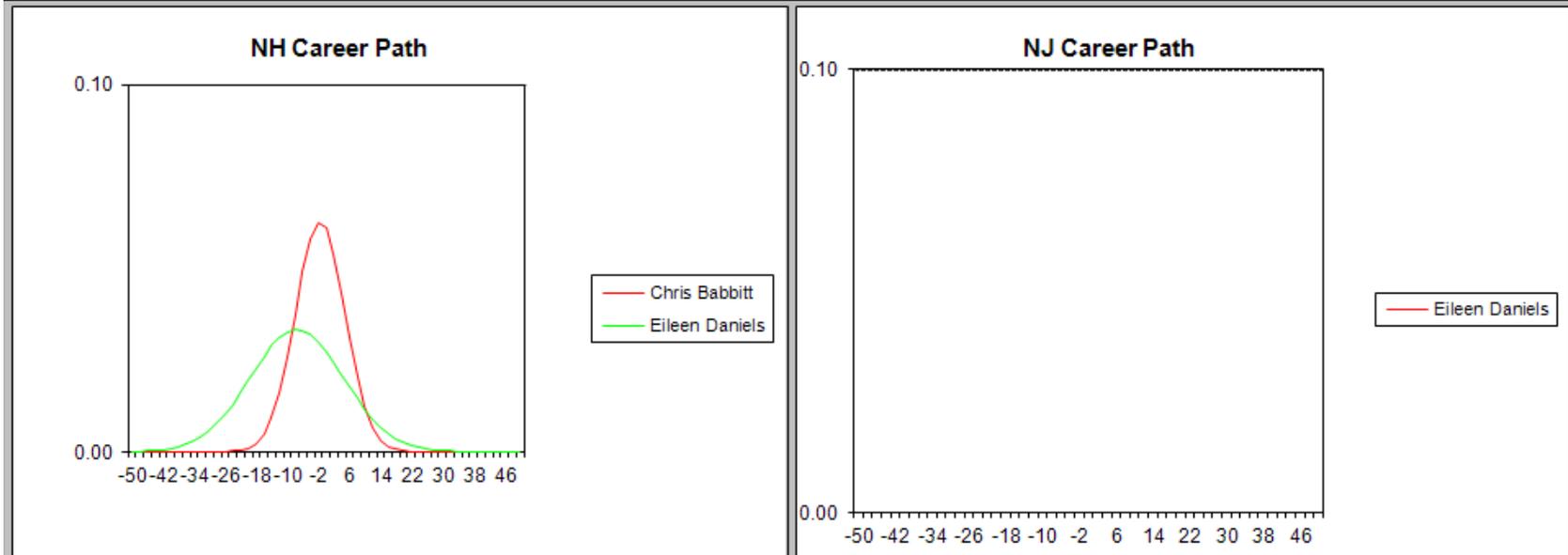
	Average Delta OCS Score	Standard Deviation	Total
<b>NH</b>			
Chris Babbitt	-1.50	6.36	3
Eileen Daniels	-7.50	12.02	2
<b>NJ</b>			
Eileen Daniels	5.00	N/A	1
<b>NK</b>			
Eileen Daniels	-1.00	N/A	1

- Displays Delta OCS averages and standard deviations
  - The top of the worksheet shows statistics by career path and overall
  - The bottom of the worksheet shows statistics for groups of employees within each career path
  - The groups can be defined by either first level supervisor (column S on the main data sheet), or any other grouping scheme entered into the first Wildcard column (H) on the main data sheet
- Filters out groups with only one employee (N/A for Standard Deviation)
  - Click on the button labeled "Hide with only 1 employee" at the top of the worksheet
  - Click on the "Show all" button to restore the display
- Can be printed by clicking on the printer icon on the Excel tool bar
- Has links to go back to the Main Menu (Contents) worksheet, and to the Delta OCS distribution plots

[Return to Main Menu](#)

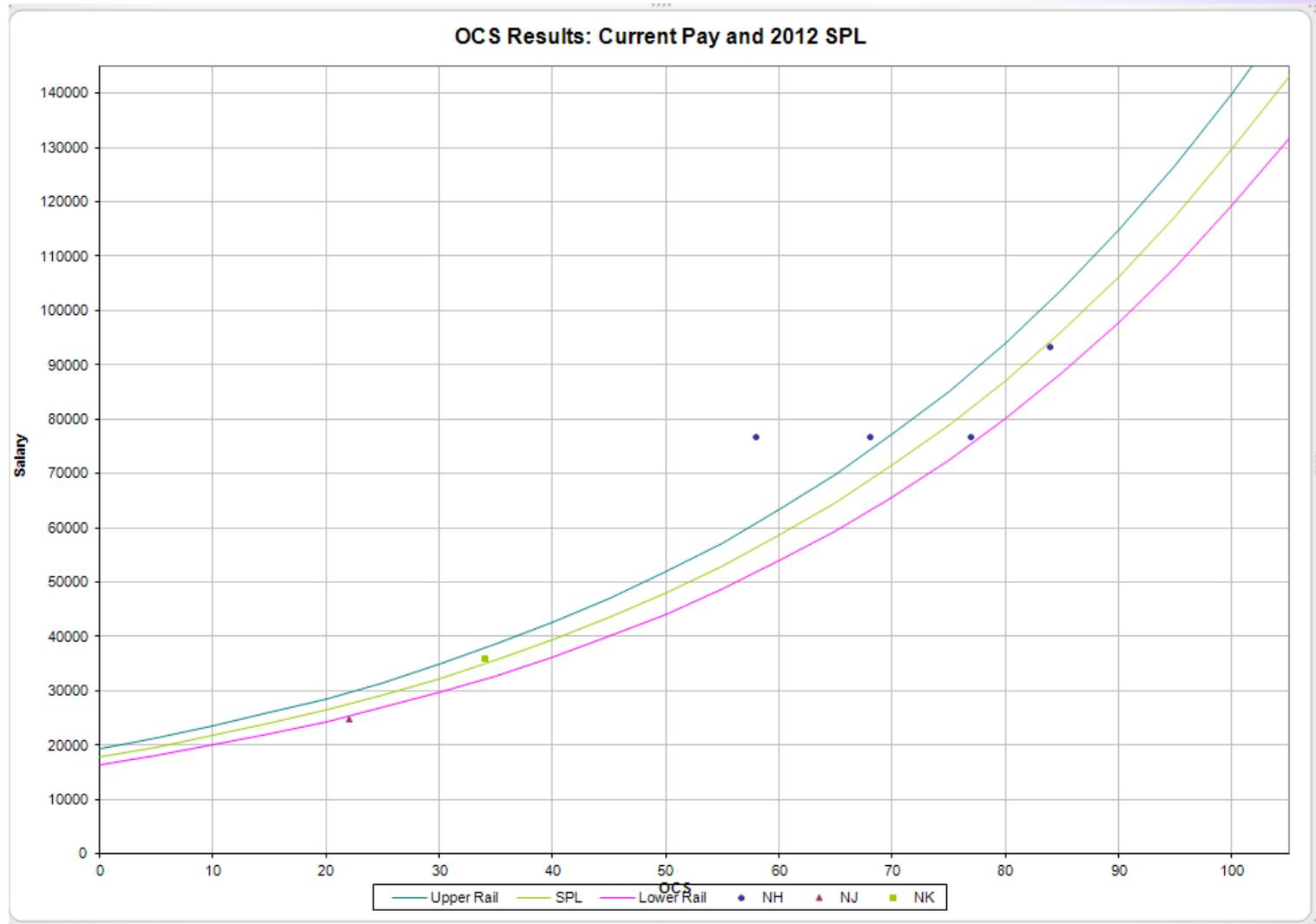
[View Delta OCS Statistics](#)

## Distribution of Delta OCS



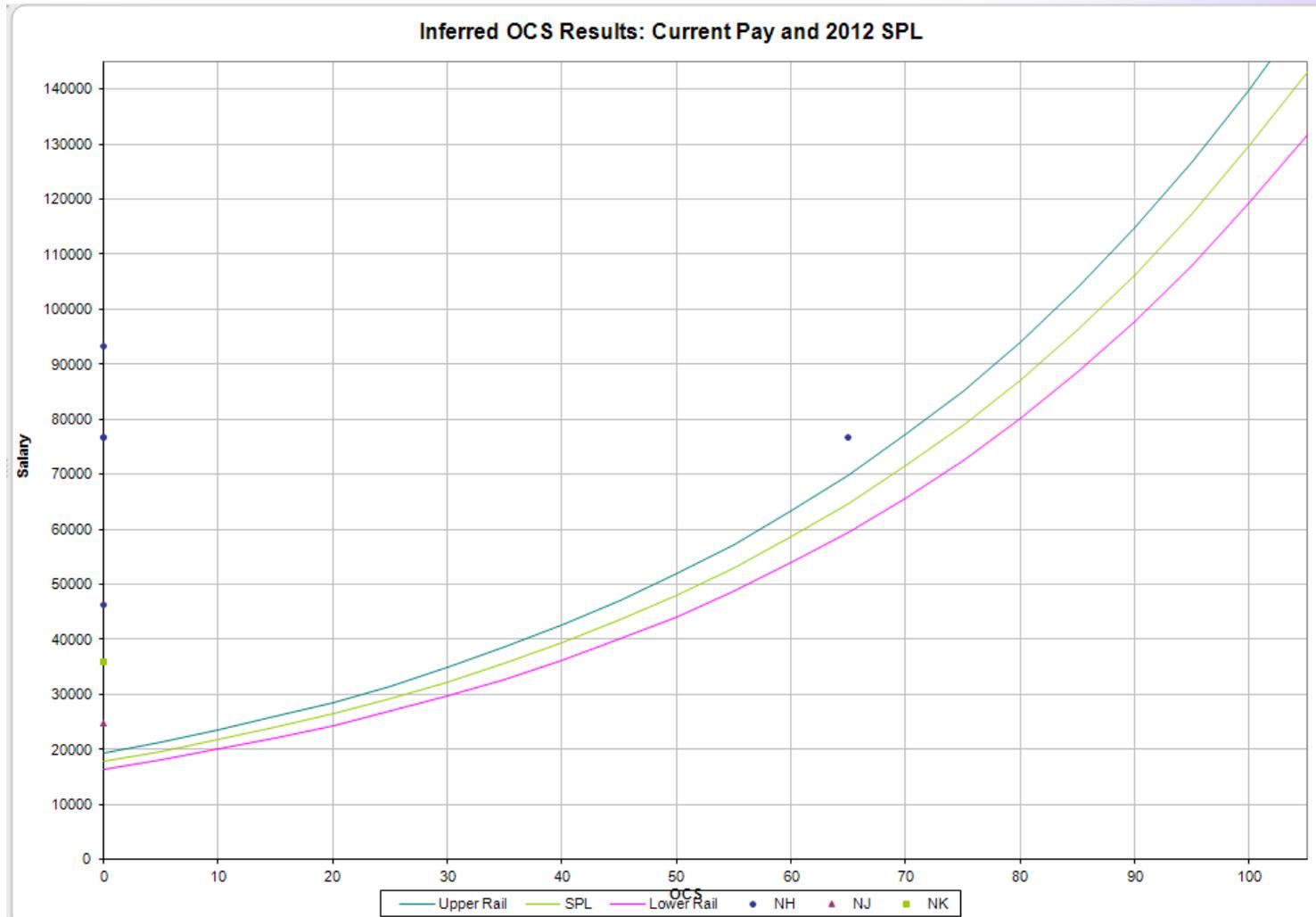
- Displays the data from the “Delta Stats” worksheet
- Has links to go back to the Main Menu (Contents) and the Delta OCS Statistics worksheets

## Sub Panel Spreadsheet "Cur OCS" Tab



- Shows, for each career path, how employee pay and contribution compare to the SPL and rails for a given year
  - To preclude employees from appearing on the scatterplots, filter or hide rows for those employees on the Data tab
  - To identify the specific values associated with a dot on the graph, place the mouse pointer on the dot (only works if there are fewer than 255 people in the sub-panel)

# Sub Panel Spreadsheet "Inf OCS" Tab



- Is identical to the “Cur OCS” worksheet except that inferred OCS is plotted instead of current OCS
  - Inferred OCS is computed from category factor scores by taking the midpoint of the numerical score range associated with each category score
  - Can be used to visualize the results of category score assignments prior to proceeding on to numerical score assignment
  - To preclude employees from appearing on the scatterplots, filter or hide rows for those employees on the Data tab
  - To identify the specific values associated with a dot on the graph, place the mouse pointer on the dot
- You can adjust the size of the plot markers using the “Format” icon on the custom toolbar

# CMS Spreadsheet Structure

## The 10 CCAS Spreadsheet Tabs

Tab	Description
1. Contents	Provides a brief description of the workbook, its purpose, and contents
2. Parameters	Is where the pay pool manager sets the parameters that define the pay adjustment scenario for the pay pool
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8. Cur OCS	Shows OCS vs. current (unadjusted) pay on top of the CY2012 SPL and rails
9. Inf OCS	Is identical to the previous one, except that inferred OCS is plotted instead of final numerical OCS
10. New OCS	Is identical to the previous two, except that OCS is plotted with new (adjusted) base pay against the 2012 SPL and rails

## Compensation Management Spreadsheet

Cycle: 2012      Version: 1.0

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**Data/Spreadsheet Download** -- Download the data file from the website, then click on Import to load the file into this spreadsheet.

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**Generate Part 1's** -- First use the filters to select employees; sort data by preferred order; then click on the Generate Part I to generate Part I of the Appraisal Form for each selected employee.

### Paypool Data

[Import](#)   [View](#)   [Export](#)

Last Import:   
 Last Export:   
 Last Modified:

### Parameters

[Set CRI and CA Parameters](#)

### Summary Reports

- [Rails Report](#)
- [Career Path Factor Matrices ranked by Final Score](#)
- [Summary Statistics of Delta OCS](#)
- [Distribution of Delta OCS](#)

### Scatter-plots of OCS Score by Salary

[Current Pay & 2012 SPL](#)   [Inferred](#)   [New Pay & 2013 SPL](#)

### Part 1 of Appraisal Forms

[Open Existing Evaluation](#)

Generate Part 1 of Appraisal Form for selected individuals by sort order  
*Use the filters to select individuals then sort data by preferred order*

[Generate Part 1 of Appraisal Forms](#)

- Provides a brief description of the workbook, its purpose and contents
- Appears first as you open the workbook and activate the macros
- Allows to import and export files, navigate around the workbook, and generate Part I of the Appraisal Forms
- Displays the cycle year in the upper left corner just below the red title bar. The date and time of the last import and export of files into and out of the workbook are shown in the upper right corner

# CMS Spreadsheet "Parameters" Tab

[Return to Main Menu](#)

[Return to Data](#)

Reset to Default Values

You may set any parameters in Yellow

## Scenario Summary

G%	-		
GS-1/step1 pay (13)	\$ 17,803		
GS-1/step1 pay (12)	\$ 17,803	Cash Amount	Plus Unused GPI
CRI%	2.100000%	\$67,253	\$67,253
CRI Set-Aside <input type="radio"/> % <input checked="" type="radio"/> \$	0.000000%	\$0	Plus CRI Balance
Award%	1.000000%	\$36,096	\$36,113
Award Set-Aside <input type="radio"/> % <input checked="" type="radio"/> \$	0.000000%	\$0	
Beta 1 (CRI)	0		
Beta 2 (Award)	1		
Minimum CRI Dollar Amount	\$50		
Minimum CRI Carryover Amt	\$75		
Minimum Award Dollar Amount	\$100		
G carry over	\$ -		
CRI remainder	\$ 17		
Award remainder	\$ 177		
Alpha 1	0.2397		
Alpha 2	0.0688		
Minimum CRI Budget %	2.0		
Minimum Award Budget %	0.798509		

Start with little or no CRI and CA set-aside and increase it gradually. If you reduce the set-aside after allocating your discretionary funds, your remainder will go negative and you will have to delete all or some of your allocations and start over again. Set aside may change if rollover amount changes. The cash award amount is 90% of the total award budget plus CRI remainder.

Check box if this is your organization's first cycle in AcqDem.

Percent required to equal 1% of Base Pay

0.798509%

Award funding is based on sum of Adjusted Base Pay where Adjusted Base Pay is limited by EX-IV cap. Most Pay Pools will enter 1%.

Beta 1 and 2  
1= Upper Rail  
0= SPL  
-1= Lower Rail

Use Control Points

- New
  - Use check box for new organizations to allow CRI funding of 2.4%
  - CA is now computed using adjusted base pay, so most pay pools will enter 1.0%, new organizations will enter 1.3%, and bargaining unit pay pools will enter their set percentage
  - Off to the right is the % to use to have CA funding equal 1% of base pay
- Is where the pay pool manager sets the parameters that define the pay adjustment scenario for the pay pool
  - Only yellow-colored cells can be edited
- Shows the first three and the last seven lines in the table in white to notify you they are for information only and are not adjustable by the pay pool manager
  - Note: detailed description of each parameter is available in the "BACKUP" section of this presentation

# CMS Spreadsheet "Data" Tab

[Return to Main Menu](#)   [Edit Parameters](#)

**Goto**  
[Scores](#)   [GPI](#)  
[CRI Awards](#)

Blue arrows indicate fields set to filter the data.

**Headings for wildcards.**  
 Select cell above heading, arrow down, and edit heading in formula bar.

Total CY 12 Base Pay for Funding \$3,202,530  
 Total CY 12 Adjusted Base Pay \$4,010,636

Above EX-IV  
 Cap Dollars  
 \$7,775

Last Name	First Name	Middle Initial	Suffix	CAS2Net ID	Paypool	Office Symbol	Wildcard 1	Presumptive Status?	Retained Pay?	Career Path	Broadband Level	Occ Series	CY2012 Base Pay	Locality Code	Locality Rate	CY2012 Pay Used in CRI and CA Calculations	Used in Award Funding Limitation	Previous OCS	Start Date	CRI Override?
Freeman	Francis			2	AMC/LH	AMC/LH		0	0	NH	4	0318	\$121,500	LA	27.16%	\$121,500	\$154,499	0	1-Feb-99	0
Curtiss	Dan			4	AMC/LH	AMC/LHA	CCAS 0817 0947	0	1	NH	4	0830	\$163,275	LA	27.16%	\$129,517	\$155,500		1-Feb-99	0
Evans	Francis			5	AMC/LH	AMC/LHX		0	0	NH	4	0830	\$107,107	LA	27.16%	\$107,107	\$136,197		1-Feb-99	0
Gonzalez	Helen			6	AMC/LH	AMC/LHAC		0	0	NH	4	0340	\$107,107	LA	27.16%	\$107,107	\$136,197		15-May-03	0
Iverson	John			7	AMC/LH	AMC/LHAD		0	0	NH	4	0830	\$125,000	WA	24.22%	\$125,000	\$155,275		1-Feb-99	0
Quarles	Richard			11	AMC/LH	AMC/LHACB		0	0	NH	3	0830	\$76,725	LA	27.16%	\$76,725	\$97,564		1-Feb-99	0
Stewart	Tammy			12	AMC/LH	AMC/LHADA		0	0	NH	3	0830	\$76,725	LA	27.16%	\$76,725	\$97,564		1-Feb-99	0
Udell	Vincent			13	AMC/LH	AMC/LHADB		0	0	NH	3	0850	\$76,725	LA	27.16%	\$76,725	\$97,564		1-Feb-99	0
Babbitt	Chris			15	AMC/LH	AMC/LHXSA	CCAS 0817 0854	0	1	NH	3	0803	\$107,500	ZX	14.16%	\$93,175	\$107,500		25-Oct-00	0
Fites	George			17	AMC/LH	AMC/LHXTA		0	0	NH	3	0896	\$76,725	LA	27.16%	\$76,725	\$97,564		1-Feb-99	0
Hansen	Ike			18	AMC/LH	AMC/LHXTB		0	0	NH	3	0830	\$64,292	LA	27.16%	\$64,292	\$81,754		1-Feb-99	0
Artis	Amy			19	AMC/LH	AMC/LHACA	CCAS Update	0	0	NH	2	0318	\$46,401	LA	27.16%	\$46,401	\$59,004	38	1-Feb-99	0
Celon	Connie			21	AMC/LH	AMC/LHACA		1	0	NH	3	0334	\$76,725	LA	27.16%	\$76,725	\$97,564	74	1-Aug-03	0
Evans	Erin			23	AMC/LH	AMC/LHACB	CCAS Update	0	0	NH	3	0830	\$76,725	LA	27.16%	\$76,725	\$97,564		1-Feb-99	0
Farnsworth	Fred			24	AMC/LH	AMC/LHACB		0	0	NH	2	0830	\$46,401	LA	27.16%	\$46,401	\$59,004		1-Feb-99	0
Grimes	Garth			25	AMC/LH	AMC/LHACB		0	0	NH	2	0850	\$46,401	LA	27.16%	\$46,401	\$59,004		1-Feb-99	0
Harris	Henry			26	AMC/LH	AMC/LHADA		0	0	NH	2	0830	\$46,401		0.00%	\$46,401	\$46,401		1-Feb-99	0
Jerris	Jane			28	AMC/LH	AMC/LHADA		0	0	NH	3	0830	\$76,725	LA	27.16%	\$76,725	\$97,564		1-Feb-99	0
Lawrence	Lance			30	AMC/LH	AMC/LHADB		0	0	NH	3	0830	\$76,725	LA	27.16%	\$76,725	\$97,564		1-Feb-99	0
Martinez	Mary			31	AMC/LH	AMC/LHADB		0	0	NH	3	0830	\$76,725	LA	27.16%	\$76,725	\$97,564		1-Feb-99	0
Nance	Nolan			32	AMC/LH	AMC/LHADB		0	0	NH	3	0850	\$76,725	LA	27.16%	\$76,725	\$97,564		1-Feb-99	0
Sorenson	Sarah			36	AMC/LH	AMC/LHXSA		0	0	NH	3	1515	\$76,725	LA	27.16%	\$76,725	\$97,564	76	1-Feb-99	0
Tarman	Timothy			37	AMC/LH	AMC/LHXSA		0	0	NH	3	0340	\$76,725	LA	27.16%	\$76,725	\$97,564		1-Feb-99	0
Ulanov	Uli			38	AMC/LH	AMC/LHXSA		0	0	NH	2	0334	\$46,401		0.00%	\$46,401	\$46,401		1-Feb-99	0

- Contains all of the data
- Is where individual contribution factor scores and compensation adjustments are computed and recorded
- Has 8 yellow-colored "Wildcard" columns that let you enter your own data, formulas, etc.
- Includes built-in "Add-ins" support functionalities such as Validate, Clear Circles, Highlight, Hide/Unhide, Clear All Filters and Sort
- Has links in the upper left corner: (1) to Return to the Main Menu (Contents); (2) to Edit Parameters; (3) to Go To Scores, GPI, CRI and Awards within Data worksheet

[Return to Main Menu](#)

[Return to Data](#)

Factor Matrix

[All](#) [NH](#) [NJ](#) [NK](#)

Each list gives the name and integer score on the factor. Use the buttons to rank order the lists by integer score.

Rank Order  
Lowest to Highest

Rank Order  
Highest to Lowest

Rank Order  
Lowest to Highest  
by Broadband

Rank Order  
Highest to Lowest  
by Broadband

All Career Paths

2012 OCS			
NK	Donaldson	Dennis	2 40
NK	Irinski	Ivan	3 48
NK	Karnes	Keith	2 40
NK	Williams	Wilson	2 34
NK	Arndt	Aaron	2 36
NK	Dancy	Dyanne	1 28
NJ	Garfield	George	4 78
NJ	Yates	Zane	4 76
NJ	O'Connor	Olive	4 77
NJ	Parsons	Patricia	3 65
NJ	Rhone	Ronald	3 60
NJ	Hoang	Andrew	1 46
NJ	Hoang	Eric	1 22
NH	Freeman	Francis	4 103
NH	Curtiss	Dan	4 107
NH	Evans	Francis	4 83
NH	Gonzalez	Helen	4 90
NH	Iverson	John	4 88
NH	Quarles	Richard	3 80
NH	Stewart	Tammy	3 82
NH	Udell	Vincent	3 69
NH	Babbitt	Chris	3 88
NH	Fites	George	3 75

NH Career Path

Final Scores																							
prb solving		team wk		cust ritns		leadership		comm		rsrc m													
Freeman	Francis	4	100	Freeman	Francis	4	100	Freeman	Francis	4	115	Freeman	Francis	4	100	Freeman	Francis	4	100	Freeman	Francis	4	100
Curtiss	Dan	4	99	Curtiss	Dan	4	99	Curtiss	Dan	4	99	Curtiss	Dan	4	115	Curtiss	Dan	4	115	Curtiss	Dan	4	115
Evans	Francis	4	83	Evans	Francis	4	80	Evans	Francis	4	82	Evans	Francis	4	77	Evans	Francis	4	84	Evans	Francis	4	84
Gonzalez	Helen	4	90	Gonzalez	Helen	4	90	Gonzalez	Helen	4	90	Gonzalez	Helen	4	90	Gonzalez	Helen	4	90	Gonzalez	Helen	4	90
Iverson	John	4	93	Iverson	John	4	84	Iverson	John	4	89	Iverson	John	4	87	Iverson	John	4	82	Iverson	John	4	82
Quarles	Richard	3	79	Quarles	Richard	3	81	Quarles	Richard	3	83	Quarles	Richard	3	73	Quarles	Richard	3	81	Quarles	Richard	3	81
Stewart	Tammy	3	75	Stewart	Tammy	3	82	Stewart	Tammy	3	83	Stewart	Tammy	3	81	Stewart	Tammy	3	85	Stewart	Tammy	3	85
Udell	Vincent	3	73	Udell	Vincent	3	67	Udell	Vincent	3	75	Udell	Vincent	3	69	Udell	Vincent	3	64	Udell	Vincent	3	64
Babbitt	Chris	3	99	Babbitt	Chris	3	89	Babbitt	Chris	3	86	Babbitt	Chris	3	85	Babbitt	Chris	3	83	Babbitt	Chris	3	83
Fites	George	3	80	Fites	George	3	75	Fites	George	3	69	Fites	George	3	79	Fites	George	3	75	Fites	George	3	75
Hansen	Ike	3	74	Hansen	Ike	3	81	Hansen	Ike	3	80	Hansen	Ike	3	79	Hansen	Ike	3	76	Hansen	Ike	3	76
Artis	Amy	2	54	Artis	Amy	2	54	Artis	Amy	2	54	Artis	Amy	2	54	Artis	Amy	2	54	Artis	Amy	2	54
Celon	Connie	3		Celon	Connie	3		Celon	Connie	3		Celon	Connie	3		Celon	Connie	3		Celon	Connie	3	
Evans	Erin	3	83	Evans	Erin	3	82	Evans	Erin	3	72	Evans	Erin	3	65	Evans	Erin	3	73	Evans	Erin	3	73
Farnsworth	Fred	2	55	Farnsworth	Fred	2	49	Farnsworth	Fred	2	65	Farnsworth	Fred	2	75	Farnsworth	Fred	2	74	Farnsworth	Fred	2	74
Grimes	Garth	2	87	Grimes	Garth	2	84	Grimes	Garth	2	81	Grimes	Garth	2	66	Grimes	Garth	2	68	Grimes	Garth	2	68
Harris	Henry	2	48	Harris	Henry	2	58	Harris	Henry	2	42	Harris	Henry	2	41	Harris	Henry	2	45	Harris	Henry	2	45
Jerris	Jane	3	81	Jerris	Jane	3	70	Jerris	Jane	3	73	Jerris	Jane	3	78	Jerris	Jane	3	80	Jerris	Jane	3	80
Lawrence	Lance	3	63	Lawrence	Lance	3	72	Lawrence	Lance	3	72	Lawrence	Lance	3	74	Lawrence	Lance	3	80	Lawrence	Lance	3	80
Martinez	Mary	3	74	Martinez	Mary	3	76	Martinez	Mary	3	80	Martinez	Mary	3	82	Martinez	Mary	3	76	Martinez	Mary	3	76
Nance	Nolan	3	75	Nance	Nolan	3	81	Nance	Nolan	3	83	Nance	Nolan	3	76	Nance	Nolan	3	85	Nance	Nolan	3	85
Sorenson	Sarah	3	74	Sorenson	Sarah	3	74	Sorenson	Sarah	3	76	Sorenson	Sarah	3	77	Sorenson	Sarah	3	82	Sorenson	Sarah	3	82
Tarman	Timothy	3	20	Tarman	Timothy	3	91	Tarman	Timothy	3	77	Tarman	Timothy	3	49	Tarman	Timothy	3	80	Tarman	Timothy	3	80

- Rank orders employees by individual factor score and by OCS. Employees are identified by career path, last name, first name, and broadband
- Includes a sort order on scores (low to high or high to low) that may be done by broadband or across all broadbands
  - The order can be selected with the four buttons on the left
- Has links in the upper left corner to return to the Main Menu (Contents) worksheet or the Data worksheet

[Return to Main Menu](#)

## Rails Report

### Inferred

Rail Zone	NH		NJ		NK		Total	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
A	1	20.0%	0	N/A	0	0.0%	1	16.7%
C1	1	20.0%	0	N/A	1	100.0%	2	33.3%
C2	2	40.0%	0	N/A	0	0.0%	2	33.3%
B	1	20.0%	0	N/A	0	0.0%	1	16.7%
<b>Total</b>	<b>5</b>	<b>100.0%</b>	<b>0</b>	<b>N/A</b>	<b>1</b>	<b>100.0%</b>	<b>6</b>	<b>100.0%</b>

### Definition of Rail Zone

Inappropriately compensated above the rails  
 Appropriately compensated between the rails > SPL  
 Appropriately compensated between the rails <= SPL  
 Inappropriately compensated below the rails

### Final

Rail Zone	NH		NJ		NK		Total	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
A	5	14.3%	0	0.0%	0	0.0%	5	10.4%
C1	4	11.4%	0	0.0%	2	33.3%	6	12.5%
C2	11	31.4%	2	28.6%	1	16.7%	14	29.2%
B	15	42.9%	5	71.4%	3	50.0%	23	47.9%
<b>Total</b>	<b>35</b>	<b>100.0%</b>	<b>7</b>	<b>100.0%</b>	<b>6</b>	<b>100.0%</b>	<b>48</b>	<b>100.0%</b>

### Definition of Rail Zone

Inappropriately compensated above the rails  
 Appropriately compensated between the rails > SPL  
 Appropriately compensated between the rails <= SPL  
 Inappropriately compensated below the rails

### Upper and Lower Rails

	GS-1 Step 1	SPL base	CCS	Upper Rail	Lower Rail	SPL
2012	\$17,803	1.0200427	min	1.00	\$19,613	\$16,707 \$18,160
			max	115.00	\$188,377	\$160,469 \$174,423
2013	\$17,803	1.0200427	min	1.00	\$19,613	\$16,707 \$18,160
			max	115.00	\$188,377	\$160,469 \$174,423

- Provides counts and percentages of employees by rail position
  - The first table shows rail position by career path based on **inferred** OCS, which is estimated from category scores
  - The second table shows rail position by career path based on **final, numerical** OCS
- Includes a link to the Main Menu (Contents) worksheet in the upper left corner

## CMS Spreadsheet "Delta Stats" Tab

[Return to Main Menu](#)

[View Delta OCS Distribution](#)

**Delta Plot Grouping**

Supervisor

Wildcard 1

Refresh

Show All

Hide with only one employee

### Summary Statistics of Delta OCS Score

	Average Delta OCS Score	Standard Deviation
<b>Overall</b>	4.02	7.86
<b>NH</b>	3.34	7.83
<b>NJ</b>	8.29	9.48
<b>NK</b>	3.00	5.06

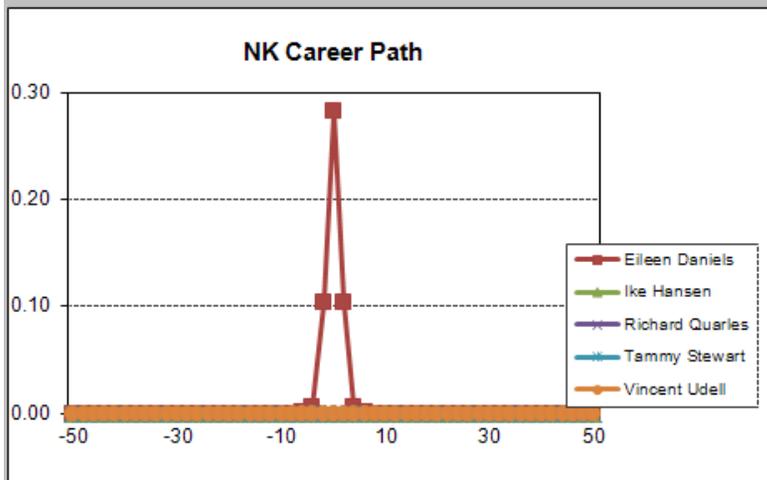
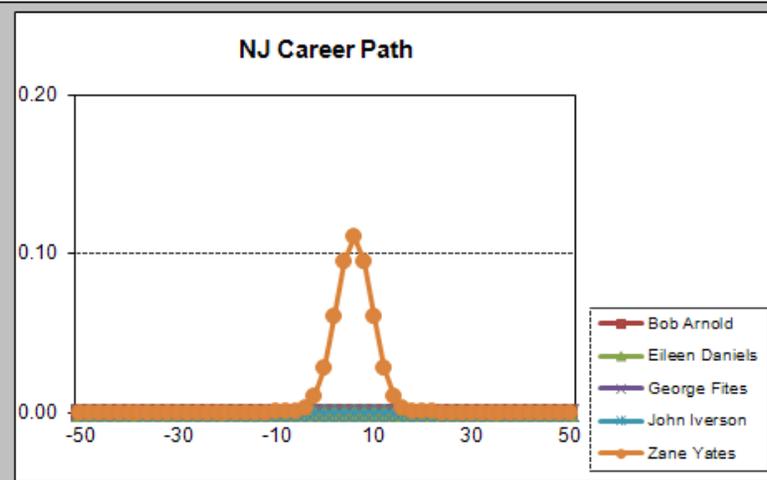
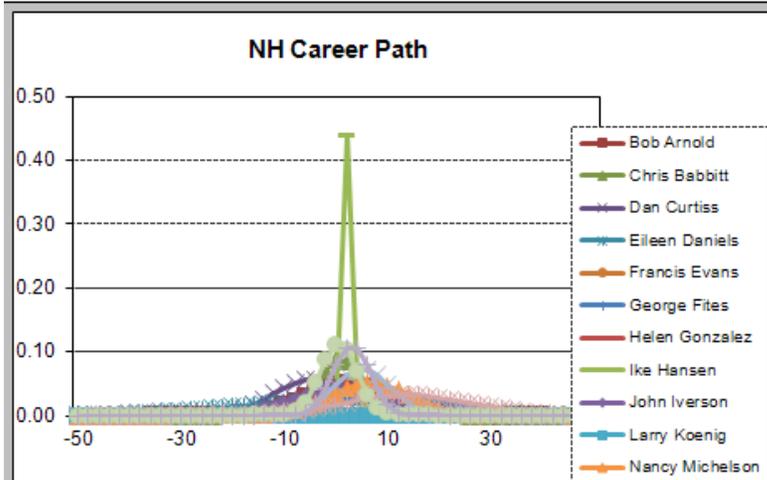
	Average Delta OCS Score	Standard Deviation	Total
<b>NH</b>			
Bob Arnold	2.00	7.81	3
Chris Babbitt	0.75	4.57	4
Dan Curtiss	-5.00	7.07	2
Eileen Daniels	-3.00	18.38	2
Francis Evans	-3.00	N/A	1
George Fites	9.50	12.02	2
Helen Gonzalez	6.00	N/A	1
Ike Hansen	2.50	0.71	2
John Iverson	1.50	9.19	2
Larry Koenig	5.00	N/A	1
Nancy Michelson	6.50	7.78	2
Peter Olson	5.00	5.39	5
Richard Quarles	13.67	12.50	3
Tammy Stewart	0.50	3.54	2
Vincent Udell	3.00	3.61	3
<b>NJ</b>			
Bob Arnold	4.00	N/A	1
Eileen Daniels	5.00	N/A	1
George Fites	29.00	N/A	1
John Iverson	2.00	N/A	1
Zane Yates	6.00	3.61	3
<b>NK</b>			
Eileen Daniels	0.00	1.41	2
Ike Hansen	11.00	N/A	1
Richard Quarles	5.00	N/A	1
Tammy Stewart	-3.00	N/A	1
Vincent Udell	5.00	N/A	1

- Displays Delta OCS averages and standard deviations
  - The top of the worksheet shows statistics by career path and overall
  - The bottom of the worksheet shows statistics for groups of employees within each career path
  - The groups can be defined by either first level supervisor (column X on the main data sheet), or any other grouping scheme entered into the first Wildcard column (H) on the main data sheet
- Filters out groups with only one employee (N/A for Standard Deviation)
  - Click on the button labeled "Hide with only 1 employee" at the top of the worksheet
  - Click on the "Show all" button to restore the display
- Can be printed by clicking on the printer icon on the Excel tool bar
- Has links to go back to the Main Menu (Contents) worksheet, and to the Delta OCS distribution plots

[Return to Main Menu](#)

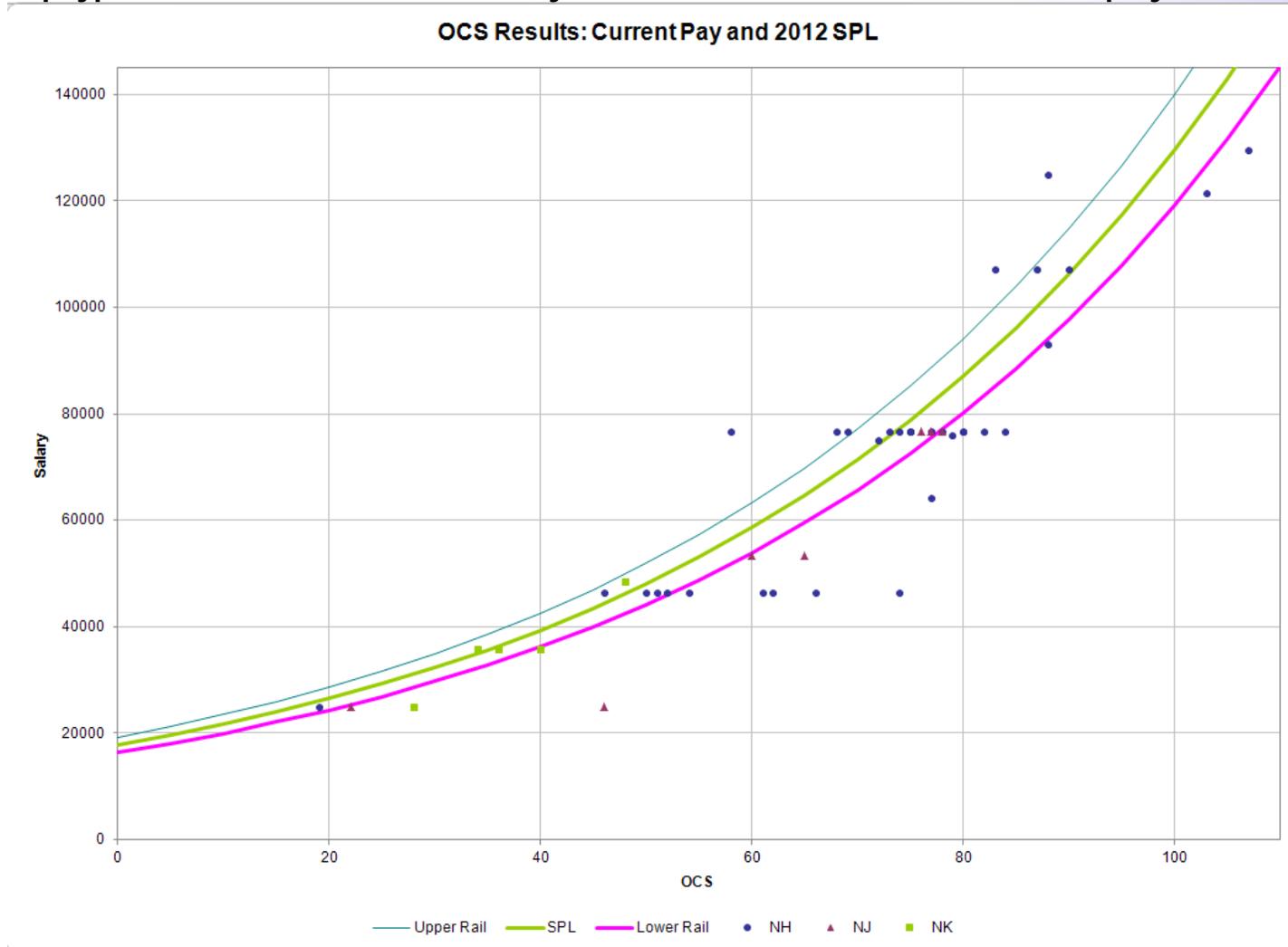
[View Delta OCS Statistics](#)

## Distribution of Delta OCS

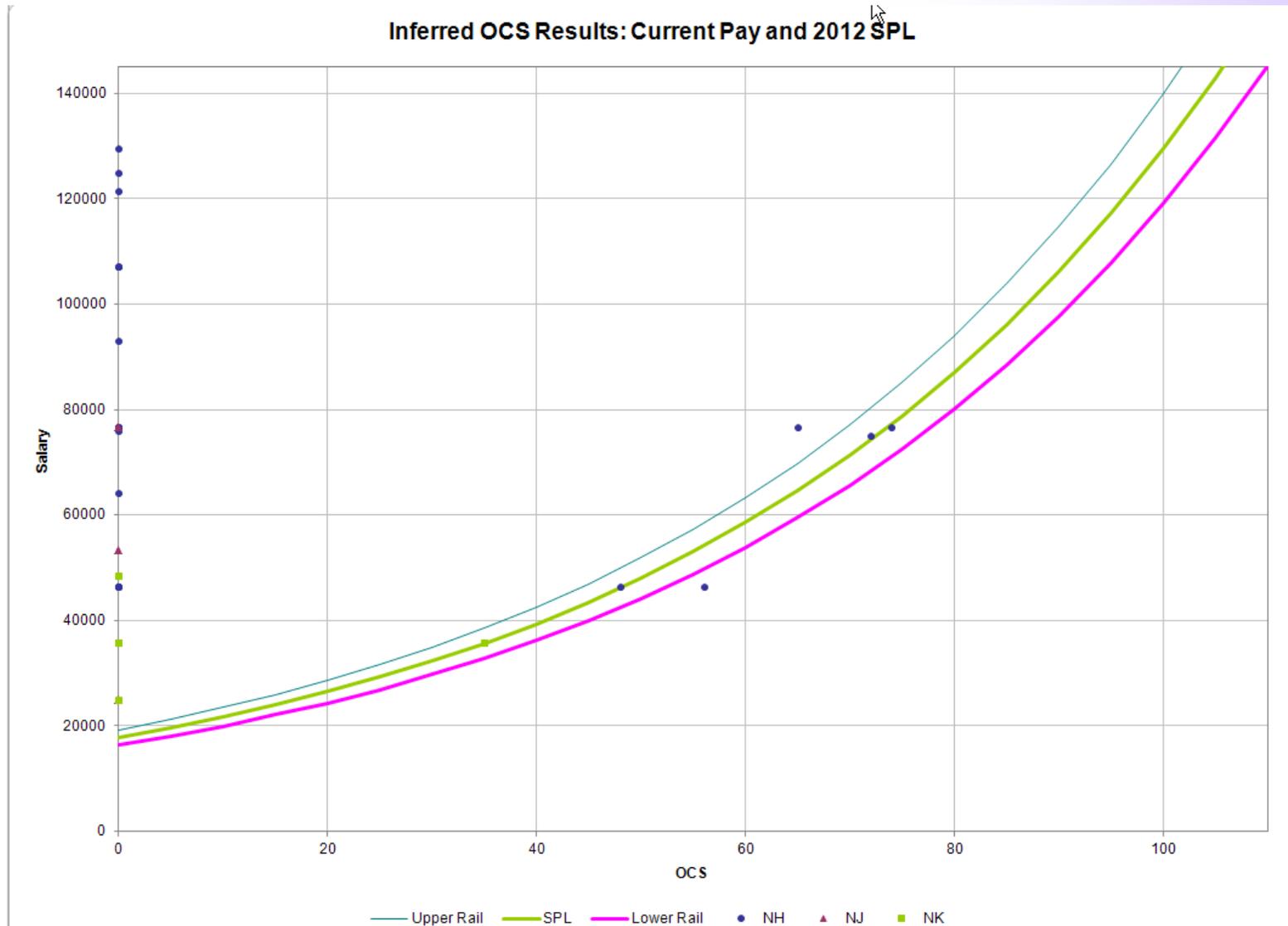


- Displays the data from the "Delta Stats" worksheet
- Has links to go back to the Main Menu (Contents) and the Delta OCS Statistics worksheets

If the payroll has less than 255 records, you can hover over each dot to see employee's name and data

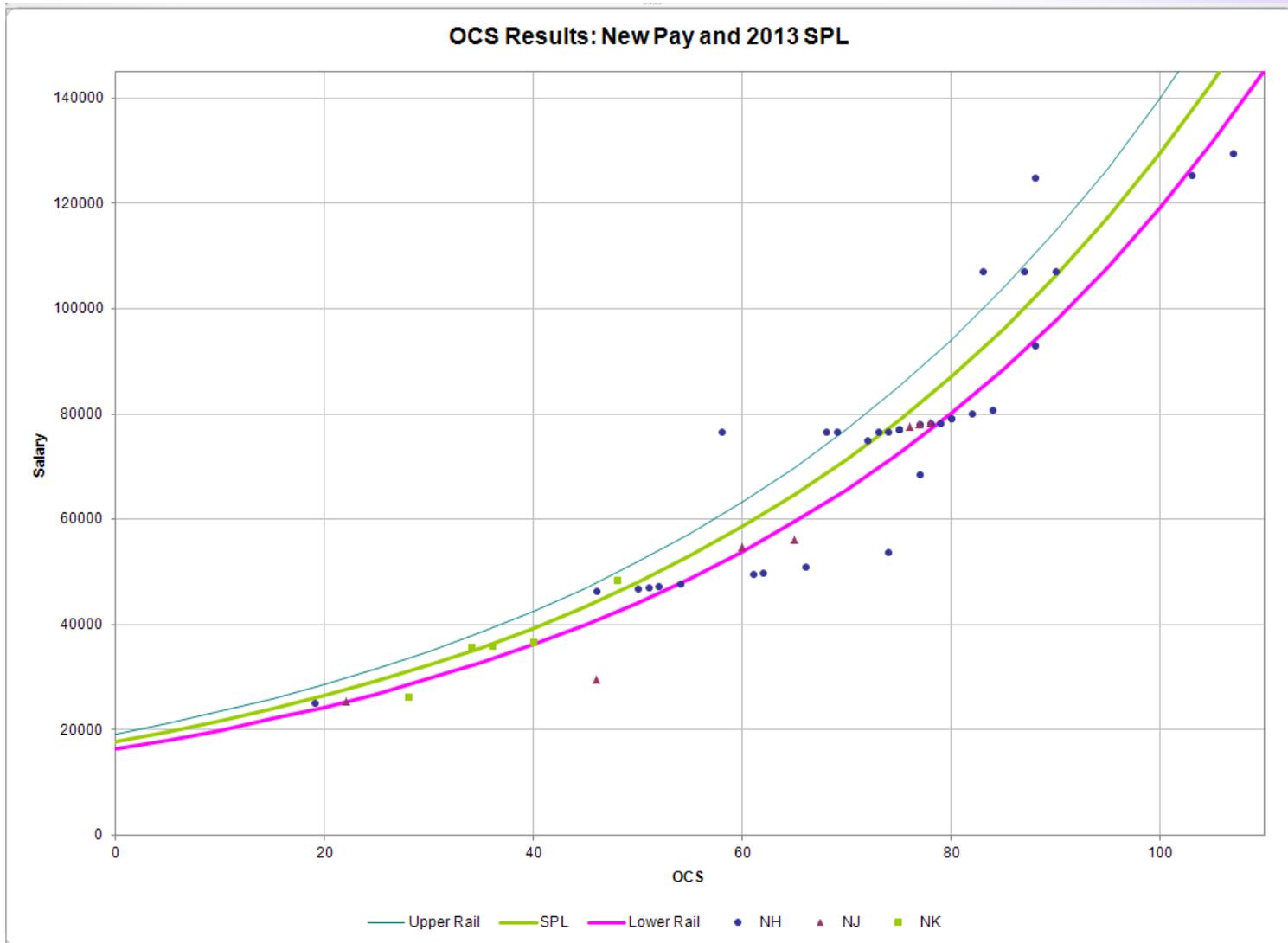


- Shows, for each career path, how employee pay and contribution compare to the SPL and rails for a given year
  - To preclude employees from appearing on the scatterplots, filter or hide rows for those employees on the Data tab
  - To identify the specific values associated with a dot on the graph, place the mouse pointer on the dot (only works when there are fewer than 255 people in the pay pool)



- Is identical to the “Cur OCS” worksheet except that inferred OCS is plotted instead of current OCS
  - Inferred OCS is computed from category factor scores by taking the midpoint of the numerical score range associated with each category score
  - Can be used to visualize the results of category score assignments prior to proceeding on to numerical score assignment
  - To preclude employees from appearing on the scatterplots, filter or hide rows for those employees on the Data tab
  - To identify the specific values associated with a dot on the graph, place the mouse pointer on the dot
- You can adjust the size of the plot markers using the “Format” icon on the custom toolbar

# CMS Spreadsheet "New OCS" Tab



- Is identical to the “Cur OCS” and “Inf OCS” worksheets, except that OCS is plotted with new (adjusted) base pay against the new SPL and rails.
  - Provides an estimate of what the contribution vs. pay relationship in the paypool might look like next year if each employee contributes at the same level they did in last year
  - Comparing this plot with the current OCS/pay scatter plot shows the effect of the pay adjustments – hopefully, movement of employees toward the appropriately compensated zone (between the rails)

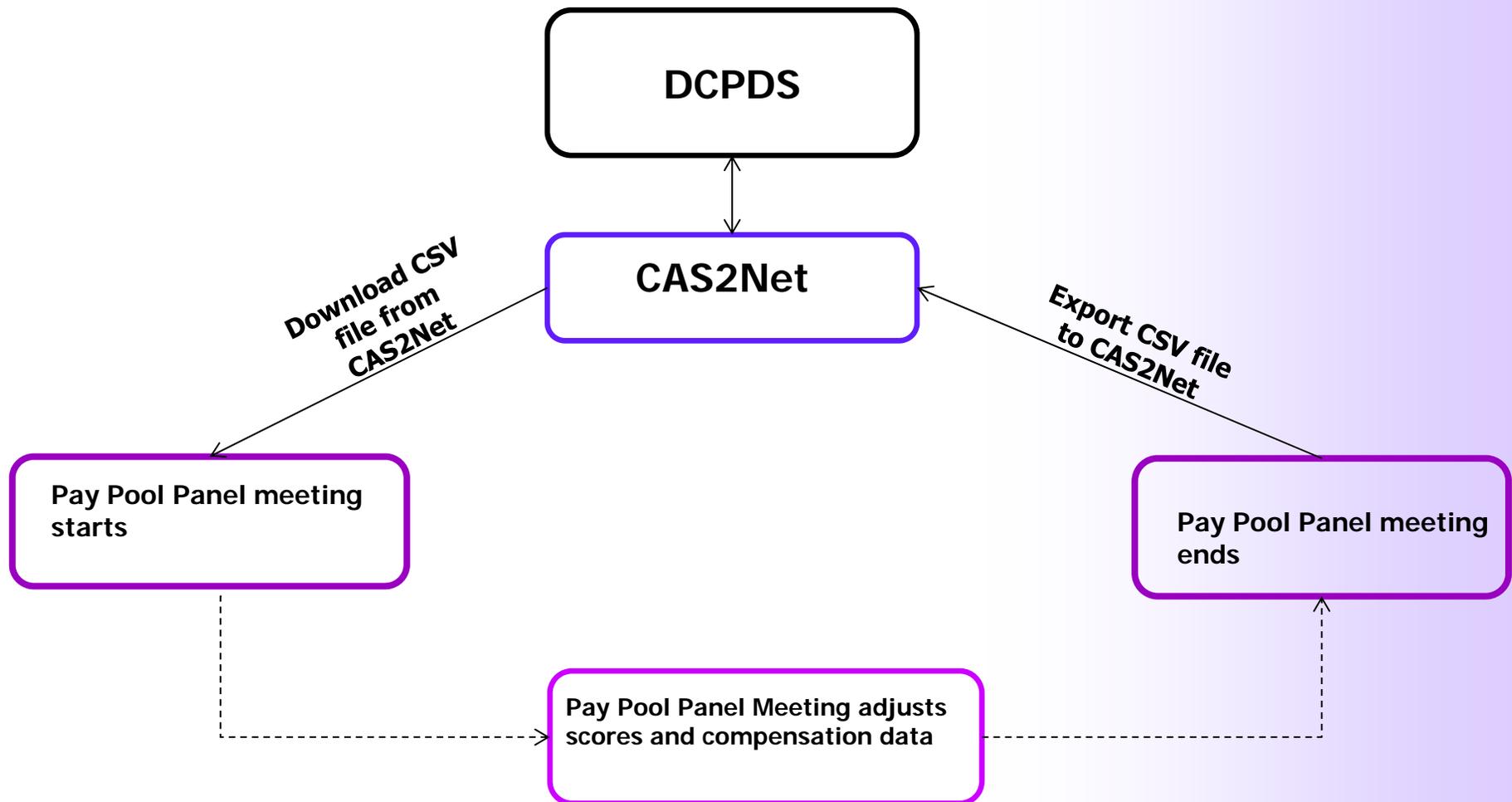
## Role of the Pay Pool Administrator

- Ensure personnel data are correct in CAS2Net
- Monitor the organization's progress in the CCAS process (scores, assessments, sub-panel meetings, etc)
- Use the CCAS Software to present data that managers need in order to make informed and sound appraisal decisions
- Shortly after the 1<sup>st</sup> of the month (October through December), go to Pay Pool Notices in CAS2Net to find your monthly Discrepancy Report
  - Verify any discrepancies noted by correcting CAS2Net data or confer with personnel

## Role of the Pay Pool Administrator (continued)

- React to pay pool managers as they decide if first-level supervisors are going to recommend just category factor scores (i.e., 3M, 4L) or category and integer factor scores
  - Communicate with pay pool managers to become aware of decision
  - Use that knowledge when reviewing data downloaded to spreadsheets
- Remind pay pool managers that determining factor scores is a multi-step process
  - Employees describe their contributions on each factor
  - First level supervisors edit and expand on the descriptions
  - First level supervisors determine the contribution level (1-4) for each factor by comparing the contribution description to the standard AcqDemo descriptors and discriminators, available at: <http://www.acq.osd.mil/acqdemo/ccas/factors.html>
  - First level supervisors recommend a category (H, M, L) within the level (and perhaps a specific integer score) for each factor

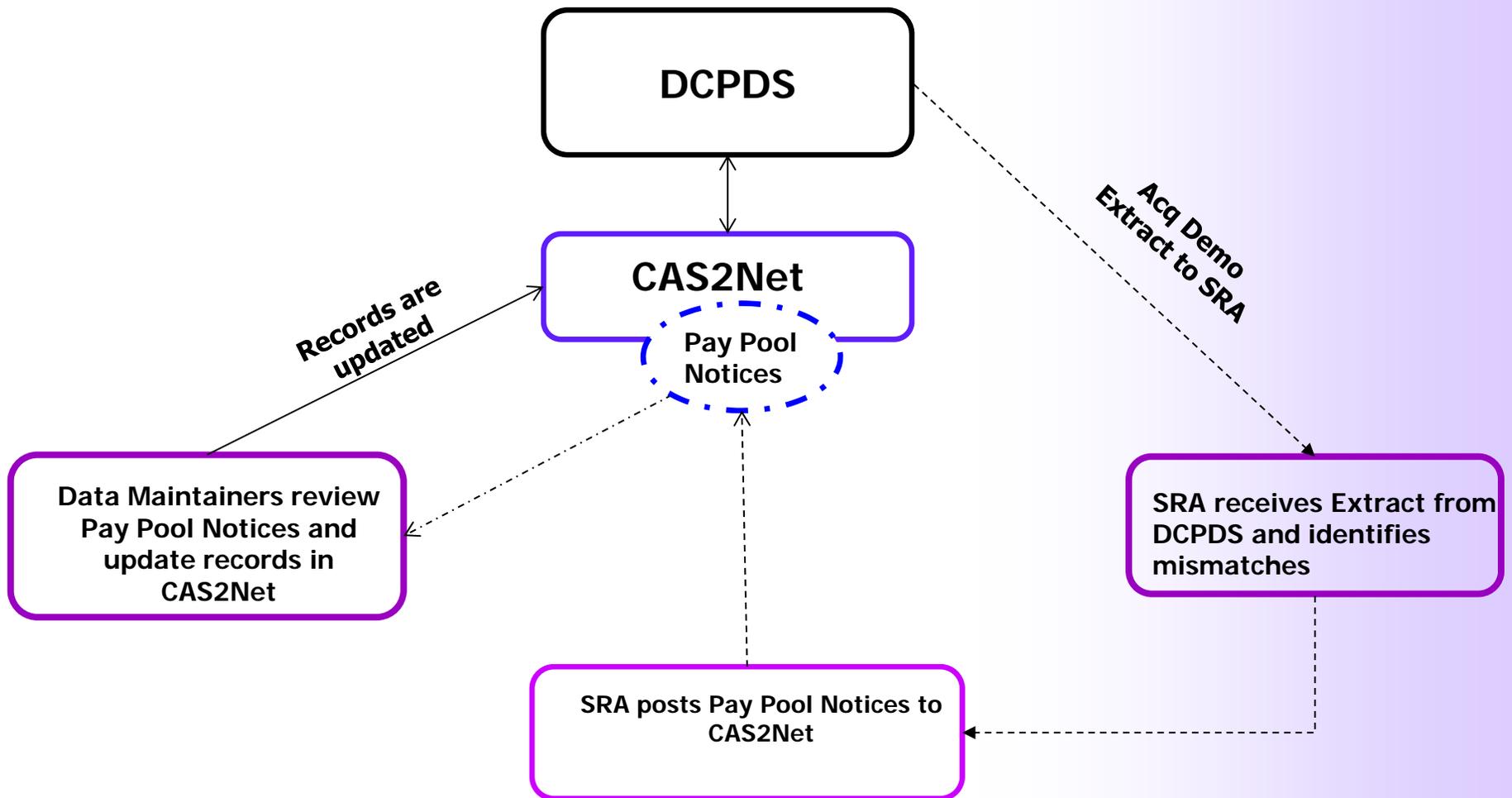
## CCAS Data Processing for Pay Pool Meetings



- Use CAS2Net to download and upload data adjustments without compromising changes made during the pay pool
- Use CCAS Software functionality to import and export the CSV file (Text File)

- If a SW issue is discovered during the pay pools, you will receive a new spreadsheet in Pay Pool Notices;
  - If currently using a spreadsheet, do an Export and Upload; download the new Spreadsheet, do a Download and Import and continue working
  - If data was already uploaded, perform the same steps starting with download the new Spreadsheet

# Monthly Data Refresh Process



- If an error is discovered during a pay pool regarding a salary for example, you cannot change the salary in the spreadsheet
  - Export and upload to CAS2Net to keep any recent changes you made
  - Make the salary change in CAS2Net
  - Download and import to Spreadsheet
  - Continue your pay pool work

- In any CMS or Sub Panel Spreadsheet, a yellow-colored cell in a dataset conventionally means it can be edited. White cells are either downloaded or computed.
- Values entered or computed in a “Wildcard” cell will be saved in any export back to CAS2Net, and will be returned to this worksheet in subsequent imports
- Formulas entered in this column will not be preserved through subsequent export-import cycles **unless the formula is also entered in the yellow cell immediately below the wide gray line after the last person's record**
- The formula is only saved if you import back into the same spreadsheet you used to do the export
- You can change the column heading by clicking in the cell immediately above the heading, using the down arrow to enter the cell, and changing the heading in the formula bar

## Loading Sub-Panel or CMS Tools for a Sub Pay Pool or Pay Pool

- From CAS2Net Menu, select “Offline Interface”
- Select the paypool from the picklist you wish to work with (in case you are responsible for several paypools)
- Click “Download Employee Data” button
- Select applicable file
  - Entire pay pool (“CMS”)
  - Sub pay pools (shows sub panel manager’s name)

# Downloading Data from CAS2Net

- Employee Menu**
- Contribution Planning
- Mid-Point Review Self-Assessment
- Annual Appraisal Self-Assessment
- Reports
- Superuser Menu**
- Appraisal Status and Lock
- Reports
- Data Maintenance
- Session Maintenance
- Offline Interface**
- Paypool Notices
- Demo Reset

## Offline Interface

**Offline Interface Menu**

Pay Pool: AMC/LH

Last completed download (Eastern Time): 12-SEP-2012 04:20:00 PM

Last completed upload (Eastern Time): 17-AUG-2012 03:59:51 PM

Final certification is disabled.



## Offline Interface - Download

**NOTE:** Files are dynamically generated and the server may take several minutes before download starts. Please be patient and do not repeatedly request a download file which will cause the server to slow down further and may generate duplicate appraisal records.

To save a linked file to your computer, use a right mouse button click on the link and choose "Save Target As..."

Sub-Panel Meeting choices without hot links for the files have been locked. Contact your data maintainer if you need to unlock a meeting.

Paypool	File Name	File Description
AMC/LH	<span style="border: 1px solid red; border-radius: 50%; padding: 2px;">ppAMCLH_to_CCAS.csv</span>	Paypool: AMC/LH
AMC/LH	ppAMCLH_to_Sub-Panel_Bob_Arnold.csv	Sub-Panel Manager: Bob Arnold
AMC/LH	ppAMCLH_to_Sub-Panel_Dan_Curtiss.csv	Sub-Panel Manager: Dan Curtiss
AMC/LH	ppAMCLH_to_Sub-Panel_Francis_Evans.csv	Sub-Panel Manager: Francis Evans
AMC/LH	ppAMCLH_to_Sub-Panel_Helen_Gonzalez.csv	Sub-Panel Manager: Helen Gonzalez
AMC/LH	ppAMCLH_to_Sub-Panel_John_Iverson.csv	Sub-Panel Manager: John Iverson
AMC/LH	ppAMCLH_to_Sub-Panel_Larry_Koenig.csv	Sub-Panel Manager: Larry Koenig
AMC/LH	ppAMCLH_to_Sub-Panel_Nancy_Michelson.csv	Sub-Panel Manager: Nancy Michelson
AMC/LH	ppAMCLH_to_Sub-Panel_(No_Sub-Panel).csv	Sub-Panel Manager: None Assigned
AMC/LH	ppAMCLH_to_Sub-Panel_Sam_Battista.csv	Sub-Panel Manager: Sam Battista

[ Return to Offline Interface Menu ]

- The naming convention for CSV files helps identify the data source and the file function
  - Pay Pool import file from CAS2net to CMS Spreadsheet:
    - pp(Pay Pool Name)\_to\_CMS.csv
    - Example: **ppAMCLH\_to\_CMS.csv** where AMCLH is Pay Pool Name
  - Sub-Pay Pool import file from CAS2Net to Sub-Panel Spreadsheet:
    - pp(Pay Pool Name)\_to\_Sub-Panel\_(Sub Panel Manager Name).csv
    - Example: **ppAMCLH\_to\_Sub-Panel\_Bob\_Arnold.csv** where Bob Arnold is the sub panel manager's name
  - Pay Pool export file from CMS Spreadsheet:
    - pp(Pay Pool Name) to Master.csv
    - Example: **ppAMCLH\_to\_Master.csv**
  - Sub-Pay Pool export file from Sub-Panel Spreadsheet:
    - Pp(Pay Pool Name)\_Sub-Panel\_()\_to\_Master\_(Sub Panel Manager Name).csv
    - Example: **ppAMCLH\_to\_Master\_Bob\_Arnold.csv**
- Sub-panel managers and pay pool managers can access their own files for download

A	B	C	D	E	F	G	H	I	J	K	L	
Cycle	CRI%	CRI Set-Aside	Awd%	Awd Set-Aside	Beta 1 (CRI)	Beta 2 (CA)	Minimum CRI amount	Min CRI Carry amount	Min CA amount	Type	Pay Cap 2013	Pay C
2012	2.1	0.2	1.2324	0.25	0	1	50	75	100	PAY	155500	
G	SPLstep1	SPLbase	NH1	NH2	NH3	NH4	NJ1	NJ2	NJ3	NJ4	NK1	NK2
0	17803	1.0200427	31871	65371	93175	129517	31871	48917	65371	93175	31871	
Last Name	First Name	Middle Initial	Suffix	ID	Paypool	Office Symbol	WildCard 1	Presumptive Status?	Retained Pay?	Career Path	Broadband Level	Occ S
Freeman	Francis				2 AMC/LH	AMC/LH		0	0	NH	4	
Garfield	George				3 AMC/LH	AMC/LH		0	0	NJ	4	
Curtiss	Dan				4 AMC/LH	AMC/LHA	CCAS 0817 0947	0	1	NH	4	
Evans	Francis				5 AMC/LH	AMC/LHX		0	0	NH	4	
Gonzalez	Helen				6 AMC/LH	AMC/LHAC		0	0	NH	4	
Iverson	John				7 AMC/LH	AMC/LHAD		0	0	NH	4	
Quarles	Richard				11 AMC/LH	AMC/LHACB		0	0	NH	3	
Stewart	Tammy				12 AMC/LH	AMC/LHADADA		0	0	NH	3	
Udell	Vincent				13 AMC/LH	AMC/LHADB		0	0	NH	3	
Yates	Zane				14 AMC/LH	AMC/LHADC		0	0	NJ	4	
Babbitt	Chris				15 AMC/LH	AMC/LHXSA	CCAS 0817 0854	0	1	NH	3	
Fites	George				17 AMC/LH	AMC/LHXTA		0	0	NH	3	
Hansen	Ike				18 AMC/LH	AMC/LHXTB		0	0	NH	3	
Artis	Amy				19 AMC/LH	AMC/LHACA	CCAS Update	0	0	NH	2	
Colson	Cornie				21 AMC/LH	AMC/LHACA		1	0	NH	2	

- The result of the download is a text file that
  - holds employee data
  - is formatted for importing into the Sub-Panel or CMS tools (note that the formats are different and the tool will generate a warning message if you try to import the wrong type of file)

## Compensation Management Spreadsheet

Cycle: 2012      Version: 1.0

*The purpose of this spreadsheet is to record appraisal scores and set basic pay rates and contribution-based financial awards.*

**Data/Spreadsheet Download** -- Download the data file from the website, then click on Import to load the file into this spreadsheet.

**Appraisal Score Entry** -- Once the file has been loaded, assign categorical and final scores for each factor, and view reports and graphs.

**Score Normalization** -- Compare score distributions to look for anomalies and scale differences. Run preliminary pay adjustment scenarios. Set CRI and CA parameters and assign pay outs to employees.

**Data Maintenance** -- All additions, deletions, and modifications must be done in the central database. All columns except for data entry and "wild-card" are locked. To preserve your work, export the data from this spreadsheet and upload to the central database before changing any information in the database.

**Final "G" Setting** -- This spreadsheet comes with a best estimate of "G." Once you have been notified that "G" is set, make a final round trip to CAS2Net. The final "G" value and related parameters will be included in the download of your payroll data.

**Final Compensation Setting** -- After the final round trip to update "G", finalize the pay adjustments and awards for your payroll.

**Data Upload** -- Use Export to create a file for uploading the results from your pay pool to the central database on the website.

**Generate Part 1's** -- First use the filters to select employees; sort data by preferred order; then click on the Generate Part I to generate Part I of the Appraisal Form for each selected employee.

### Paypool Data

[Import](#) [View](#) [Export](#)

Last Import: 9/20/2012 (11:53:29 AM)(CDT)

Last Export:

Last Modified:

Use Today

### Parameters

[Set CRI and CA Parameters](#)

### Summary Reports



[by Final Score](#)

### Scatter-plots of OCS Score by Salary

[Current Pay & 2012 SPL](#) [Inferred](#) [New Pay & 2013 SPL](#)

### Part 1 of Appraisal Forms

[Open Existing Evaluation](#)

Generate Part 1 of Appraisal Form for selected individuals by sort order  
Use the filters to select individuals then sort data by preferred order

[Generate Part 1 of Appraisal Forms](#)

## Using the Sub Pay Pool Spreadsheet For a Sub Pay Pool

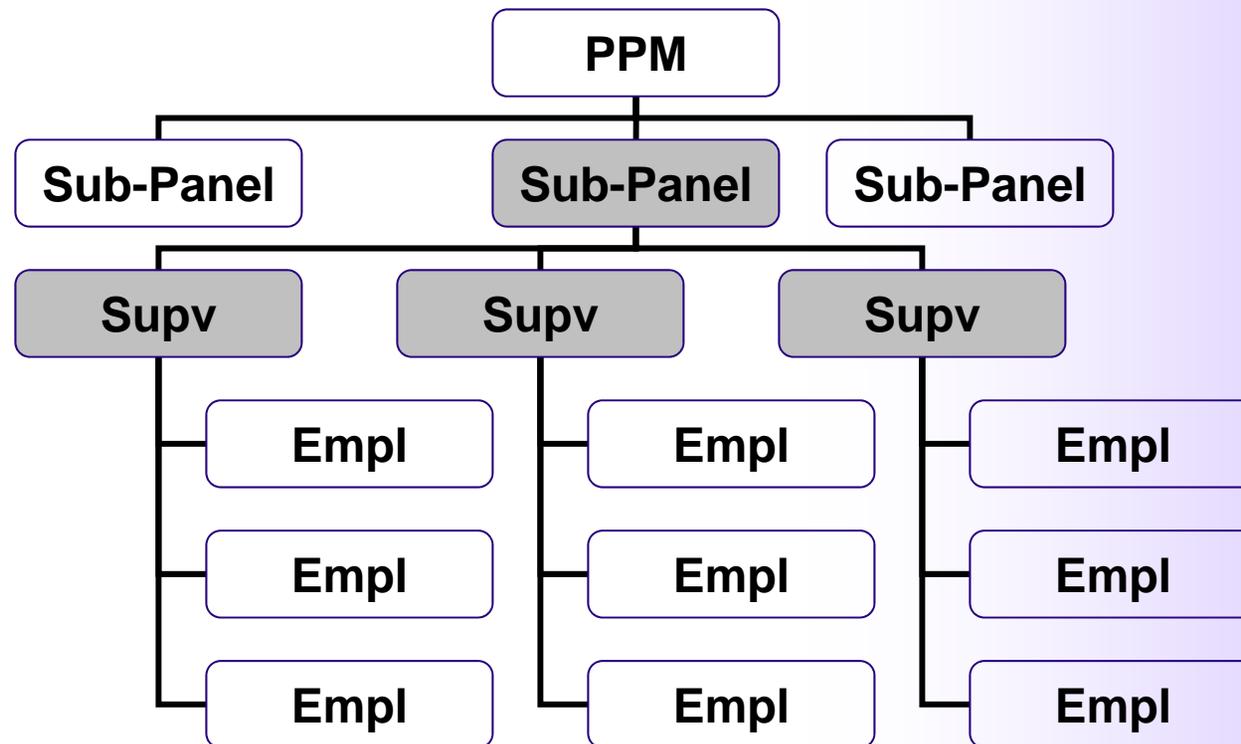
- On-line with CAS2Net
  - Must have done part IIs on line
  - Sub-panel module facilitates the leveling process
- Off-line, sub-panel spreadsheet support
  - Download the spreadsheet from CAS2Net
  - Download a data file from CAS2Net
  - Import the data file into the spreadsheet
  - Use file naming convention to identify the correct file

Note: the Sub Panel spreadsheet offers a “rack and stack” capability through the “Group into Categories” link of the “Contents” tab

- By the end of October all AcqDemo employees should have completed their self-assessments and all supervisors should have completed Part II of the Appraisal Form containing category scores on each of the six factors, along with supporting narrative comments for each employee
- By early to mid-November second-level supervisors should conduct sub-panel meetings, if applicable. This can be accomplished either using the online assessment module in CAS2Net or offline, using the sub-panel spreadsheet
- First-level supervisors usually participate in the sub-panel meetings

- You are ready for your sub-panel meeting if:
  - The CAS2Net database reflects the status of your pay pool on 30 Sept 2012
  - All employees have completed their Part IIIs
  - All first-level supervisors have completed their Part IIs (on or off line)
- Even if the Part IIs were done on-line, supervisors should take paper copies to the sub-panel meeting
  - Other documentation on employee contributions should also be taken to the meeting (e.g., letters of appreciation, awards, commendations, publications)

- Save your spreadsheet as .xls in Compatibility Mode
- Make sure to set your spreadsheet to “Enable” macros



- The meeting is held as soon as all employees have received category scores on all six factors from their first level supervisor, usually early November
- The purpose of the meeting is to normalize recommended category scores across supervisors and assign integer scores
- Note: Pay adjustments are not discussed at a sub-panel meeting

## NH – Problem Solving

<u>2H</u>	<u>3L</u>	<u>3M</u>	<u>3H</u>	<u>4L</u>
Jane Doe (65) Harry Smith (63)	Bill Davis (66) Sally Brown (64) John Jones (62)	Mary Cox (70)	Jeff Green (82) Fred Cantu (80)	Ruth Lopez (83) Dan Johnson (79)

- For each career path and each factor
  1. Put each employee in the contribution matrix based on the first-level supervisor's recommendation
  2. By discussing and comparing contributions, move employees between categories
  3. Rank order employees within each category
  4. Assign integer scores

**This is called "normalizing" or "leveling" scores**

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
1	<b>Sub-Panel Meeting Spreadsheet</b>																
2	Cycle: 2012																
3	<i>The purpose of this spreadsheet is to assign preliminary and final contribution scores to employees.</i>																
4																	
5	<p><b>Data/Spreadsheet Download</b> -- Download the offline managers meeting data file from CAS2Net and save it to your hard drive, then click on Import to load the file into this spreadsheet.</p> <p><b>Appraisal Score Entry</b> -- Once the file has been loaded, click <i>View</i> to go directly to the Data tab to enter preliminary and final scores. To assign scores using an interface that is similar to the on-line Managers Meeting, click the <i>Group into Categories</i> link. This form filters employees by Career Path, Factor, and Score Level. For each score level (1 through 4) selected there will be between four and seven list boxes representing the available preliminary scores for that level plus boxes representing the upper and lower limits of the preceding and next levels, respectively. Employees without a preliminary score will show up in the <i>Unrated</i> listbox. Employees can be moved around in listboxes (left, right, up and down) and to/from the <i>Unrated</i> listbox using the buttons on the form. To assign a final score, double-click the employee's name.</p> <p><b>Data Maintenance</b> -- All additions, deletions, and modifications must be done in CAS2Net. All columns except for data entry and "wild-card" are locked. To preserve your work, export the data from this spreadsheet and upload to CAS2Net before changing any information in the database.</p> <p><b>Data Upload</b> -- Use Export to create a file for uploading the results from your pay pool to CAS2Net.</p>										<p>Paypool Data</p> <p><a href="#">Import</a>   <a href="#">View</a>   <a href="#">Export</a></p> <p>Last Import: 9/19/2012 (2:21:39 PM)(CDT)            Last Export:            Last Modified: <input type="text"/> <input type="button" value="Use Today"/></p>						
6											<p>Scores</p> <p><a href="#">Group into Categories</a> ← <b>Click here</b></p>						
7											<p>Summary Reports</p> <p><a href="#">Rails Report</a></p> <p><a href="#">Career Path Factor Matrices ranked by Final Score</a></p> <p><a href="#">Summary Statistics of Delta OCS</a></p> <p><a href="#">Distribution of Delta OCS</a></p>						
8											<p>Scatter-plots of OCS Score by Salary</p> <p><a href="#">Current Pay &amp; 2012 SPL</a>   <a href="#">Inferred</a></p>						
9																	
10																	
11																	
12																	
13																	
14																	
15																	
16																	
17																	
18																	
19																	
20																	
21																	
22																	
23																	
24																	

Group into Categories

Career Path  
 NH  NJ  NK

Factor  
 Problem Solving  
 Teamwork  
 Customer Relations  
 Leadership  
 Communications  
 Resource Management

Level  
 1  
 2  
 3  
 4

Employee Movement  
 Up  
 Left Right  
 Down  
 Move to Unrated  
 Move from Unrated

Unrated	
Yeakley Yolanda (3)	87
Sorenson Sarah (3)	74
Ulanov Uli (2)	
Vinson Violet (3)	65

1H (24 - 29)    2L (22 - 29)    2ML (30 - 40)    2M (41 - 50)    2MH (51 - 61)    2H (62 - 66)    3

**This CMS screen emulates the CAS2Net Preliminary Score Module (see next slide)**

# CAS2Net Preliminary Score Module

**Sub-Panel Meeting**

Scoring Modules By Career Path

- Business Management and Technical Management Professional (NH)
- Technical Management Support (NJ)
- Administrative Support (NK)

Preliminary (Categorical) Score Module

Scoring Review Modules

Composite Score Module

**Preliminary Score Module**

Commence Sub-Panel Meeting

[ List of Scores ]

Close Window

**Preliminary Score Module**

Sub-Panel Meeting for Dan Curtiss - Career Path: Business Management and Technical Management Professional (NH)

Double-click the name to assign the Integer score.

FACTOR:	Level:	Employee Movement:	UNRATED-----
<ul style="list-style-type: none"> <li>Problem Solving</li> <li>Teamwork/Cooperation</li> <li>Customer Relations</li> <li>Leadership/Supervision</li> <li>Communication</li> <li>Resource Management</li> </ul>	<input checked="" type="radio"/> I <input type="radio"/> II <input type="radio"/> III <input type="radio"/> IV	Up Left Deselect Right Down Move to Unrated	UNRATED----- Hoang, Danielle (3) 9 Hummer, Hershel (3) 79 Mucker, Mark (3) 81 Quarles, Richard (3) 78 Udell, Vincent (3) 85 Move From Unrated

Factor Description

Save Changes Save & Close

1L (0 - 5)-----

1M (6 - 23)-----

1H (24 - 29)-----

2L (22 - 29)-----

Edit Comments

Close Window

Group into Categories

Career Path  
 NH  NJ  NK

Factor  
 Problem Solving  
 Teamwork  
 Customer Relations  
 Leadership  
 Communications  
 Resource Management

Level  
 1  
 2  
 3  
 4

Employee Movement  
 Up  
 Left Right  
 Down  
 Move to Unrated  
 Move from Unrated

Unrated

Yeakley Yolanda (3)	87
Sorenson Sarah (3)	74
Ulanov Uli (2)	
Vinson Violet (3)	65

1H (24 - 29)      2L (22 - 29)      2ML (30 - 40)      2M (41 - 50)

Based on panel discussion, select employee to move into category; in this example, panel wants to move “Yeakley, Yolanda” to 3L; to do so, click on the “Move from Unrated” button

Career Path  
 NH  NJ  NK

Factor  
 Problem Solving  
 Teamwork  
 Customer Relations  
 Leadership  
 Communications  
 Resource Management

Level  
 1  
 2  
 3  
 4

Employee Movement  
 Up  
 Left Right  
 Down  
 Move to Unrated  
 Move from Unrated

Unrated	
Yeakley Yolanda (3)	87
Sorenson Sarah (3)	74
Ulanov Uli (2)	
Winson Violet (3)	65

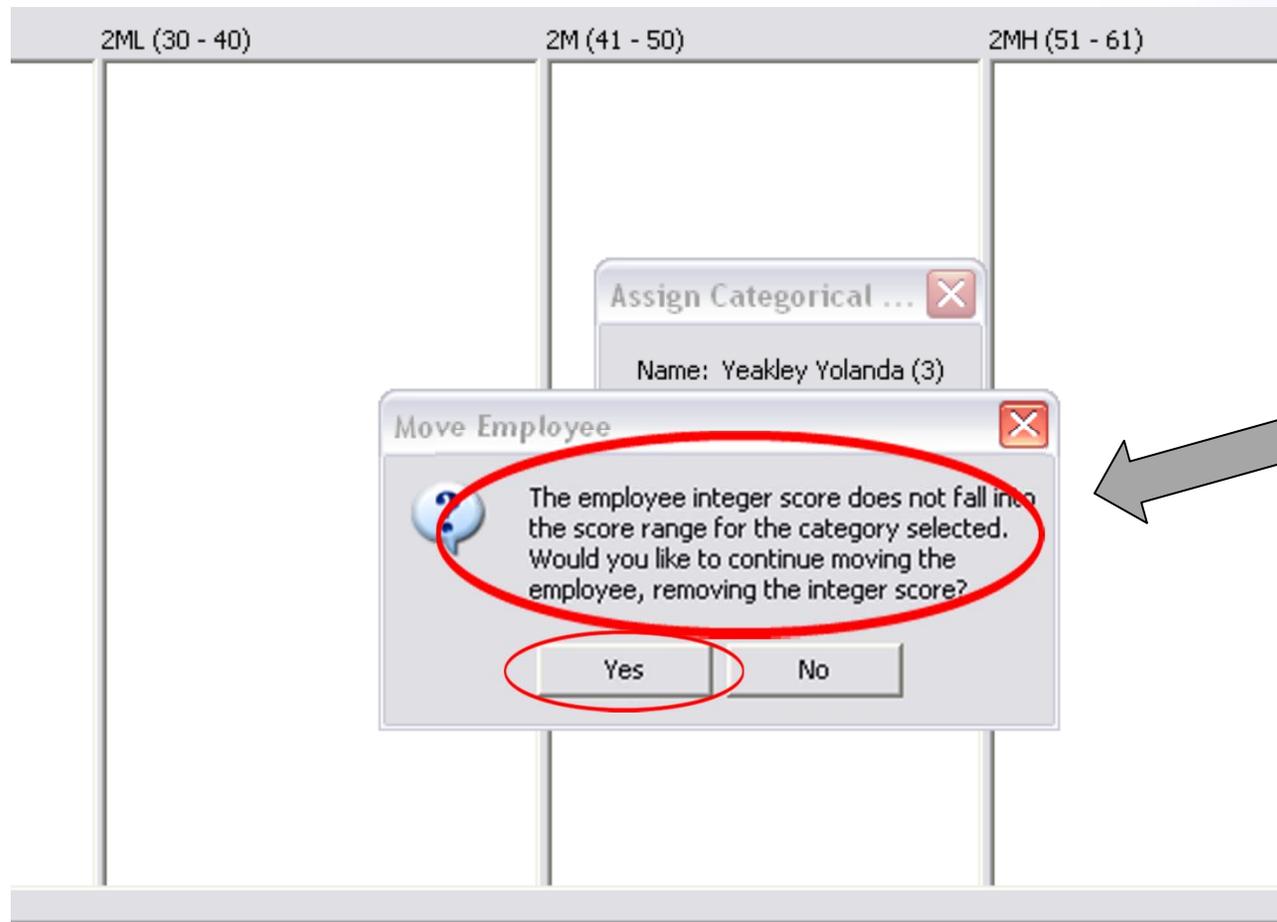
H (24 - 29)      2L (22 - 29)      2ML (30 - 40)      2M (41 - 50)

**Assign Categorical ...** [X]

Name: Yeakley Yolanda (3)

Score:

- The “Assign Categorical Score” interface appears
- Click on drop down list and select “3L”
- Click on the “Apply” button



- Because the integer score is out of range for 3L, you'll see this warning message
- Click "yes" to continue and remove the score

Group into Categories

Career Path  
 NH  NJ  NK

Factor  
 Problem Solving  
 Teamwork  
 Customer Relations  
 Leadership  
 Communications  
 Resource Management

Level  
 1  
 2  
 3  
 4

Employee Movement  
 Left  Right  
 Up  Down  
 Move to Unrated  
 Move from Unrated

Unrated  
 Sorenson Sarah (3) 74  
 Ulanov Uli (2)  
 Vinson Violet (3) 65

1H (24 - 29) 2L (22 - 29) 2ML (30 - 40) 2M (41 - 50) 2MH (51 - 61) 2H (62 - 66) 3L (61 - 66)  
 Yeakley Yolanda (3)

Employee appears in 3L column

As panel discussions continue, you may further move employee using the “Employee Movement” buttons

To move employee to a lower level, highlight employee’s name and click “Left”

Group into Categories

Path  NJ  NK

Level  1  2  3  4

Employee Movement

Up  
Left Right  
Down

Move to Unrated  
Move from Unrated

Apply  
Close

Unrated

Sorenson Sarah (3)	74
Ulanov Uli (2)	
Vinson Violet (3)	65

Problem Solving  
Work  
Customer Relations  
Partnership  
Communications  
Resource Management

2L (22 - 29)	2ML (30 - 40)	2M (41 - 50)	2MH (51 - 61)	2H (62 - 66)	3L (61)
				Yeakley Yolanda (3)	

Employee is now in the “2H” column

Group into Categories

**Career Path**  
 NH  NJ  NK

**Level**  
 1  
 2  
 3  
 4

**Factor**  
 Problem Solving  
 Teamwork  
 Customer Relations  
 Leadership  
 Communications  
 Resource Management

**Employee Movement**

Unrated

1H (24 - 29)	2L (22 - 29)	2ML (30 - 40)	2MH (41 - 50)	2MH (51 - 60)
			<input checked="" type="button" value="Up"/> Yeakley Yolanda (3) Sorenson Sarah (3) Ulanov Uli (2) Winson Violet (3)	

For each factor, use “Up” or “Down” buttons to move employees within a category to an appropriate order, as directed by panel discussion

You can group by Pay Schedule, Broadband, and Factor

## Assign Integer Score

Group into Categories

Career Path  
 NH  NJ  NK

Factor  
 Problem Solving  
 Teamwork  
 Customer Relations  
 Leadership  
 Communications  
 Resource Management

Level  
 1  
 2  
 3  
 4

Employee Movement  
 Up  
 Left Right  
 Down  
 Move to Unrated  
 Move from Unrated

Unrated

LH (24 - 29)    2L (22 - 29)    2ML (30 - 40)    2M (41 - 50)    2MH (51 - 61)

Yeakley Yolanda (3)  
 Severson Sarah (3)  
 Ulanov Uli (2)  
 Vinson Violet (3)

**Assign Integer Score**

Name: Yeakley Yolanda (3)  
 Category: Problem Solving  
 Pre-Score: 2M

Final Score:

41  
42  
43  
44  
45  
46  
47  
48

- To assign a score, double click on employee's name
- Select a score from the drop down list of the "Assign Integer Score" interface

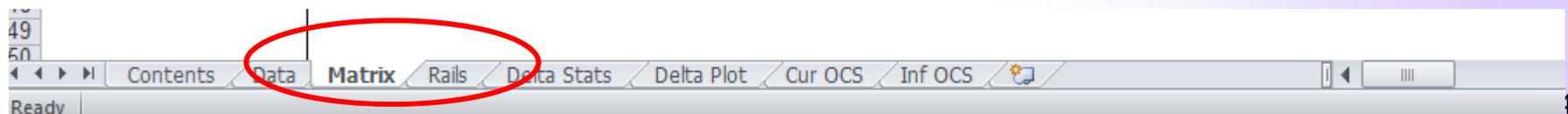
[Return to Main Menu](#)  
[Return to Data](#)  
**Factor Matrix**  
[All](#) [NH](#) [NJ](#) [NK](#)

Each list gives the name and integer score on the factor. Use the buttons to rank order the lists by integer score.

All Career Paths				NH Career Path				
2012 OCS				prb solving				
NK	Williams	Wilson	2	34	Sorenson	Sarah	3	S
NJ	Hoang	Eric	1	22	Tarman	Timothy	3	20
NH	Sorenson	Sarah	3		Ulanov	Uli	2	U
NH	Tarman	Timothy	3	68	Vinson	Violet	3	V
NH	Ulanov	Uli	2		Yeakley	Yolanda	3	Y
NH	Vinson	Violet	3					
NH	Yeakley	Yolanda	3					

Use the "Matrix" worksheet to compare score distributions by Career Path and Broadband

Review score distribution by Factor by Career Path



[Return to Main Menu](#)

## Rails Report

### *Inferred*

Rail Zone	NH		NJ		NK		Total	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
A	1	100.0%	0	N/A	0	N/A	1	100.0%
C1	0	0.0%	0	N/A	0	N/A	0	0.0%
C2	0	0.0%	0	N/A	0	N/A	0	0.0%
B	0	0.0%	0	N/A	0	N/A	0	0.0%
<b>Total</b>	<b>1</b>	<b>100.0%</b>	<b>0</b>	<b>N/A</b>	<b>0</b>	<b>N/A</b>	<b>1</b>	<b>100.0%</b>

### *Final*

Rail Zone	NH		NJ		NK		Total	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
A	1	100.0%	0	0.0%	0	0.0%	1	33.3%
C1	0	0.0%	0	0.0%	1	100.0%	1	33.3%
C2	0	0.0%	0	0.0%	0	0.0%	0	0.0%
B	0	0.0%	1	100.0%	0	0.0%	1	33.3%
<b>Total</b>	<b>1</b>	<b>100.0%</b>	<b>1</b>	<b>100.0%</b>	<b>1</b>	<b>100.0%</b>	<b>3</b>	<b>100.0%</b>

### Upper and Lower Rails

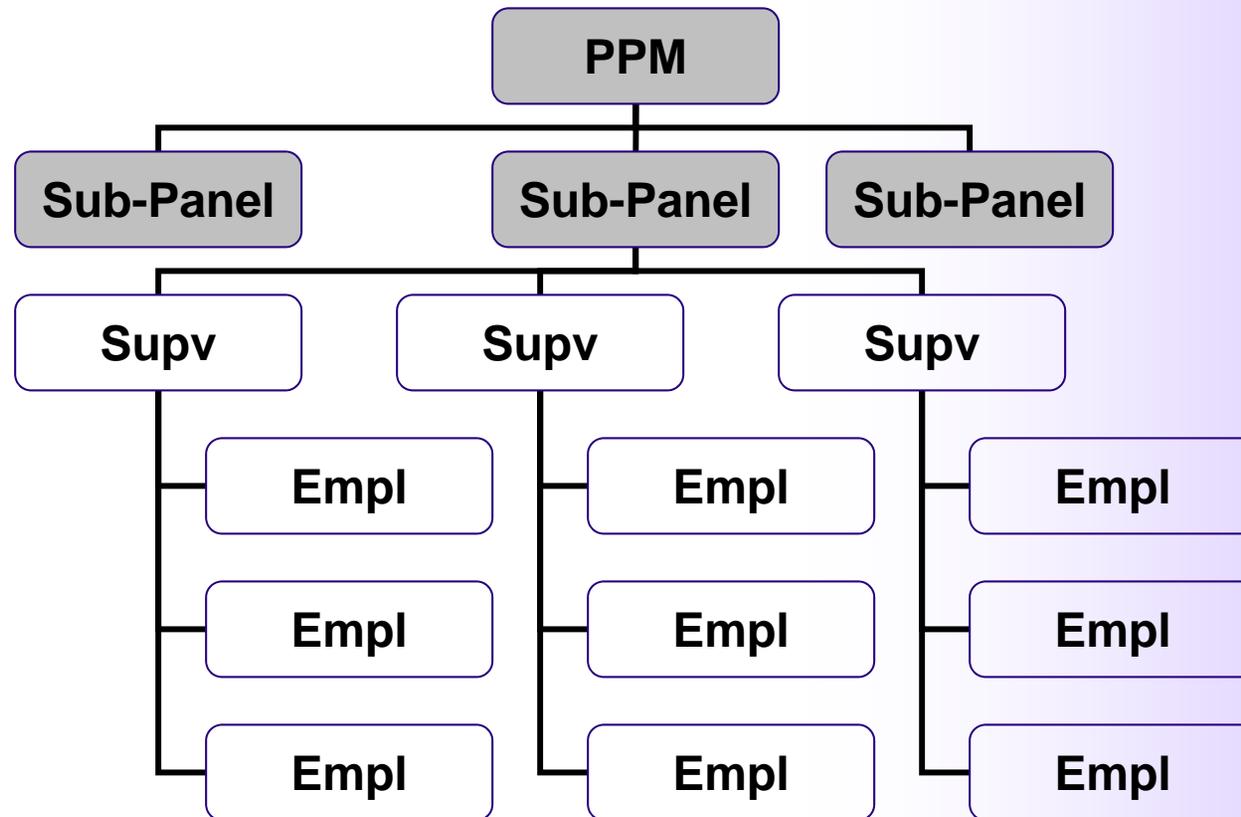
	GS-1 Step 1	SPL base	CCS	Upper Rail	Lower Rail	SPL
2012	\$17,803	1.0200427	min	1.00	\$19,613	\$16,707
			max	115.00	\$188,377	\$160,469
					\$174,423	

- Calculates how employees' scores (as a Count and a Percent) map to the different rail zones (A, C1, C2, B)
  - C1 is above the SPL and on or below the upper rail
  - C2 is on or below the SPL and on or above the lower rail
- Shows Inferred and Final reports



- Visualize overall current pay vs OCS

## Using the CMS Spreadsheet for a Pay Pool



- The meeting is held as soon as all sub-panel meeting are over, usually early December
- The purpose of the meeting is to review and normalize scores across sub-panels and assist the PPM with pay adjustments and awards

### Conducting a Pay Pool Panel Meeting

- Meeting must be done off-line, there are no on-line support tools; computations are done in the CMS only
- Download the CMS spreadsheet from CAS2Net
- Download the entire pay pool data file from CAS2Net
- Import the data file into the CMS Spreadsheet
- Importing a Pay Pool data file is the same as importing a Sub-Panel data file; remember the file naming convention to help you select the correct file

# Pay Pool Meeting: Importing Snapshot

**Employee Menu**

- Contribution Planning
- Mid-Point Review Self-Assessment
- Annual Appraisal Self-Assessment
- Reports

**Superuser Menu**

- Appraisal Status and Lock
- Reports
- Data Maintenance
- Session Maintenance
- Offline Interface
- Paypool Notices

**Offline Interface - Download**

**NOTE:** Files are dynamically generated and the server may take several minutes before download starts. Please be patient and do not repeatedly request a download file which will cause the server to slow down further and may duplicate appraisal records.

To save a linked file to your computer, use a right mouse button click on the link and choose "Save Target As..."

Sub-Panel Meeting choices without hot links for the files have been locked. Contact your data maintainer if you need to unlock a meeting.

Paypool	File Name
AMC/LH	<a href="#">ppAMCLH_to_CCAS.csv</a>
AMC/LH	<a href="#">ppAMCLH_to_Sub-Panel_Bob_Arnold.csv</a>
AMC/LH	<a href="#">ppAMCLH_to_Sub-Panel_Dan_Curtiss.csv</a>
AMC/LH	<a href="#">ppAMCLH_to_Sub-Panel_Francis_Evans.csv</a>
AMC/LH	<a href="#">ppAMCLH_to_Sub-Panel_Helen_Gonzalez.csv</a>
AMC/LH	<a href="#">ppAMCLH_to_Sub-Panel_John_Iverson.csv</a>
AMC/LH	<a href="#">ppAMCLH_to_Sub-Panel_Larry_Koenig.csv</a>
AMC/LH	<a href="#">ppAMCLH_to_Sub-Panel_Nancy_Michelson.csv</a>
AMC/LH	<a href="#">ppAMCLH_to_Sub-Panel_(No_Sub-Panel).csv</a>
AMC/LH	<a href="#">ppAMCLH_to_Sub-Panel_Sam_Battista.csv</a>

**Compensation Management Spreadsheet**

Cycle: 2012 Version: 1.0

*The purpose of this spreadsheet is to record appraisal scores and set basic pay rates and contribution-based financial awards.*

**Data/Spreadsheet Download** -- Download the data file from the website, then click on Import to load the file into this spreadsheet.

**Appraisal Score Entry** -- Once the file has been loaded, assign categorical and final scores for each factor, and view reports and graphs.

**Score Normalization** -- Compare score distributions to look for anomalies and scale differences. Run preliminary pay adjustment scenarios. Set CRI and CA parameters and assign pay outs to employees.

**Data Maintenance** -- All additions, deletions, and modifications must be done in the central database. All columns except for data entry and "wild-card" are locked. To preserve your work, export the data from this spreadsheet and upload to the central database before changing any information in the database.

**Final "G" Setting** -- This spreadsheet comes with a best estimate of "G." Once you have been notified that "G" is set, make a final round trip to CASNet. The final "G" value and related parameters will be included in the download of your paypool data.

**Final Compensation Setting** -- After the final round trip to update "G", finalize the pay adjustments and awards for your paypool.

**Data Upload** -- Use Export to create a file for uploading the results from your pay pool to the central database on the website.

**Generate Part 1's** -- First use the filters to select employees; sort data by preferred order; then click on the Generate Part 1 to generate Part 1 of the Appraisal Form for each selected employee.

**Paypool Data**

Import View Export

Last Import: Last Export: Last Modified: Use Today

**Parameters**

[Set CRI and CA Parameters](#)

**Summary Reports**

[Rails Report](#)

[Career Path Factor Matrices ranked by Final Score](#)

[Summary Statistics of Delta OCS](#)

[Distribution of Delta OCS](#)

**Scatter-plots of OCS Score by Salary**

[Current Pay & 2012 SPL](#) [Inferred](#) [New Pay & 2013 SPL](#)

**Part 1 of Appraisal Forms**

[Open Existing Evaluation](#)

Generate Part 1 of Appraisal Form for selected individuals by sort order  
Use the filters to select individuals then sort data by preferred order

[Generate Part 1 of Appraisal Forms](#)

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	
1	Cycle	2012	CRI Set-A	Awd%	Awd Set-A	Beta 1 (CF)	Beta 2 (CA)	Minimum	Minimum	Type	Pay Cap	Pay Cap	2011					
2		0	1	0	0	1	0	0	0	PAY	155500	155500						
3	G	1	SPLbase	NH1	NH2	NH3	NH4	NJ1	NJ2	NJ3	NJ4	NK1	NK2	NK3	Locality C	AT	BO	
4			320043	31871	65	93175	129517	31871	48917	65371	93175	31871	44176	59505	Locality R	19.29	24.8	
5	Last Name	First Name	ID	Paypool	Office	Sym	WildCard	Presumpti	Retained	F	Career Pat	Broadband	Occ	Series	Starting B	Locality C	Start Date	CRI Over
6	Freeman	George	31871	AMC/LH	AMC/LH			0	1	NK	2	318	35804	LA			1-Feb-99	0
7	Garfield	Dan	31871	AMC/LH	AMC/LH			0	0	NJ	4	856	76725	LA			1-Feb-99	0
8	Curtiss	Dan	31871	AMC/LHA	AMC/LHA			0	0	NH	4	830	107107	LA			1-Feb-99	0
9	Evans	Francis	31871	AMC/LHX	AMC/LHX			0	0	NH	4	830	107107	LA			1-Feb-99	0
10	Gonzalez	Helen	31871	AMC/LHAC	AMC/LHAC			0	0	NH	4	340	107107	LA			#####	0
11	Iverson	John	31871	AMC/LHAD	AMC/LHAD			0	0	NH	4	830	107107	LA			1-Feb-99	0
12	Quarles	Richard	31871	AMC/LHACB	AMC/LHACB			0	0	NH	3	830	76725	LA			1-Feb-99	0
13	Stewart	Tammy	31871	AMC/LHAD	AMC/LHAD			0	0	NH	3	830	76725	LA			1-Feb-99	0
14	Udell	Vincent	31871	AMC/LHAD	AMC/LHAD			0	0	NH	3	850	76725	LA			1-Feb-99	0
15	Yates	Zane	31871	AMC/LHAD	AMC/LHAD			0	0	NJ	4	802	76725	LA			1-Feb-99	0
16	Babbitt	Chris	31871	AMC/LHXS	AMC/LHXS			0	0	NH	3	803	76725	LA			25-Oct-00	0
17	Fites	George	31871	AMC/LHXTA	AMC/LHXTA			0	0	NH	3	896	76725	LA			1-Feb-99	0
18	Hansen	Ike	31871	AMC/LHXTB	AMC/LHXTB			0	0	NH	3	830	76725	LA			1-Feb-99	0
19	Artis	Amy	31871	AMC/LHACA	AMC/LHACA			0	0	NH	2	318	46401	LA			1-Feb-99	0
20	Celan	Connie	31871	AMC/LHACA	AMC/LHACA			1	0	NH	3	334	76725	LA			1-Feb-99	0

# CMS Spreadsheet "Parameters" Tab

[Return to Main Menu](#)

[Return to Data](#)

Reset to  
Default Values

You may set any parameters in Yellow

## Scenario Summary

G%	-		
GS-1/step1 pay (13)	\$ 17,803		
GS-1/step1 pay (12)	\$ 17,803	Cash Amount	Plus Unused GPI
CRI%	2.100000%	\$67,253	\$67,253
CRI Set-Aside <input type="radio"/> % <input checked="" type="radio"/> \$	0.000000%	\$0	Plus CRI Balance
Award%	1.000000%	\$36,096	\$36,113
Award Set-Aside <input type="radio"/> % <input checked="" type="radio"/> \$	0.000000%	\$0	
Beta 1 (CRI)	0		
Beta 2 (Award)	1		
Minimum CRI Dollar Amount	\$50		
Minimum CRI Carryover Amt	\$75		
Minimum Award Dollar Amount	\$100		
G carry over	\$ -		
CRI remainder	\$ 17		
Award remainder	\$ 177		
Alpha 1	0.2397		
Alpha 2	0.0688		
Minimum CRI Budget %	2.0		
Minimum Award Budget %	0.798509		

Start with little or no CRI and CA set-aside and increase it gradually. If you reduce the set-aside after allocating your discretionary funds, your remainder will go negative and you will have to delete all or some of your allocations and start over again. Set aside may change if rollover amount changes. The cash award amount is 90% of the total award budget plus CRI remainder.

Check box if this is your organization's first cycle in AcqDem.

Percent required to equal 1% of Base Pay

0.798509%

Award funding is based on sum of Adjusted Base Pay where Adjusted Base Pay is limited by EX-IV cap. Most Pay Pools will enter 1%.

Beta 1 and 2  
1= Upper Rail  
0= SPL  
-1= Lower Rail

Use Control Points

## Data Sheet: Override Options

- CRI Override set to 1 means the employee does not receive a CRI payout from the CRI computation algorithm
- Similarly, CA Override set to 1 means the employee does not receive a CA payout from the CA computation algorithm
- Rollover CRI to CA means the any CRI payout becomes a roll-over award even if the employee is not on retained pay, does not hit a pay cap, and does not hit a control point. There are three choices in the rollover decision. 0 = Never rollover, 1 = rollover amount above a limit, and 2 = rollover everything
- The supervisory hierarchy comes from CAS2Net

										R	S	T	U	V	W	X	Y	Z
										Copy to 1st Sig		Copy to 1st Sig		Copy to 2nd Sig		Copy to 2nd Sig		
and in rd ding itation	Previous OCS	Start Date	CRI Override?	CA Override?	Rollover CRI to CA?	1st Level Sup Name	Sub-Panel Managers Meeting	Pay Pool Manager Name										
154,499	0	1-Feb-99	0	0	1	Bob Arnold		Bob Arnold										
155,500		1-Feb-99	0	0	1	Bob Arnold		Bob Arnold										
136,197		1-Feb-99	0	0	1	Bob Arnold		Bob Arnold										
136,197		15-May-03	0	0	1	Dan Curtiss	Bob Arnold	Bob Arnold										
155,275		1-Feb-99	0	0	1	Dan Curtiss	Bob Arnold	Bob Arnold										

## Data Sheet: Enter Part I Form Data

- Use the columns shown to enter names that will be shown under the two signature blocks on the Part I Form for each employee.
- Also, enter optional remarks for the Part I Form for each employee.

AA	AB	AC
Part 1: 1st Signature	Part 1: 2nd Signature	Part 1: Remarks
▼	▼	▼

## Data Sheet: CRI Section

- Gray highlighting means the employee is not eligible for discretionary CRI.
- Yellow highlighting means they are eligible
- Note that the spreadsheet enforces the several pay caps that apply – there are more than just the top of the pay band (see table below)

CI	CJ	CK	CL	CM	CN	CO	CP	CQ
Set CRI 2.10%	Total CRI		G carry-over= \$0.00					
	Default=	\$67,104	CRI Budget = \$67,253.13					
	Discretionary=	\$0	CRI Set Aside = \$134.51					
	Computed =	\$67,104	Alpha1= 0.239219					
Available Balance=		\$149.13						
(Default CRI) Alpha1	(PPM Input) Discretionary CRI	Computed CRI \$	Computed CRI %	Computed Base Pay 2013	Max Allowable CRI %	Allow to exceed 20% limit	CY2013 UR Pay	
	\$3,818	\$0	\$3,818	3.14%	\$125,318	20.00%	0	\$148,459
	\$0	\$0	\$0	0.00%	\$163,275	0.00%	0	\$160,724
	\$0	\$0	\$0	0.00%	\$107,107	0.00%	0	\$99,825

Category	General Pay Increase	Contribution Rating Increase	Contribution Award	Locality Pay <small>Basic Pay plus locality pay may not exceed Executive Level IV basic pay.</small>
Inappropriately Compensated -A	Could be reduced or denied	NO	NO	YES
Appropriately Compensated -C	YES	YES— Up to 6% <small>May not exceed upper rail of NPR for employee's OCS or maximum salary for current broadband level.</small>	YES <small>Pay pool manager approves up to \$10,000. Amounts exceeding \$10,000 require local commander's approval.</small>	YES
Inappropriately Compensated -B	YES	YES— Up to 20% <small>Over 20% requires local commander's approval. May not exceed 6% above the lower rail or the maximum salary for current broadband level.</small>	YES	YES

Control points can be set for each employee

					CK	CL	CM	CN	CO	CP	CQ	CR	CS	CI	CU	
<a href="#">Return to Main Menu</a> <a href="#">Edit Parameters</a> Goto <a href="#">Scores GPI</a> <a href="#">CRI Awards</a> Blue arrows indicate fields set to filter the data.					Total CRI \$67,104 G carry-over= \$0.00 CRI Budget = \$67,253.13 CRI Set Aside = \$134.51 Alpha1= 0.239219											
					\$149.13											
Last Name	First Name	Middle Initial	Suffix	CAS2Net ID	(PPM Input) Discretionary CRI	Computed CRI \$	Computed CRI %	Computed Base Pay 2013	Max Allowable CRI %	Allow to exceed 20% limit	CY2013 UR Pay	CY2013 LR Pay	Control Point	Allow Over Control Point?	Max Base Pay 2013	Cap Local Pay
Freeman	Francis			2	\$0	\$3,818	3.14%	\$125,318	20.00%	0	\$148,459	\$126,465	\$127,000	0	\$127,000	\$12
Curtiss	Dan			4	\$0	\$0	0.00%	\$163,275	0.00%	0	\$160,724	\$136,913		0	\$163,275	\$16
Evans	Francis			5	\$0	\$0	0.00%	\$107,107	0.00%	0	\$99,825	\$85,036		0	\$107,107	\$12
Gonzalez	Helen			6	\$0	\$0	0.00%	\$107,107	6.00%	0	\$114,701	\$97,709		0	\$113,533	\$12
Iverson	John			7	\$0	\$0	0.00%	\$125,000	0.00%	0	\$110,238	\$93,907		0	\$125,000	\$12
Quarles	Richard			11	\$0	\$2,479	3.23%	\$79,204	20.00%	0	\$94,056	\$80,122		0	\$84,929	\$12
Stewart	Tammy			12	\$0	\$3,322	4.33%	\$80,047	20.00%	0	\$97,864	\$83,365		0	\$88,367	\$12
Udell	Vincent			13	\$0	\$0	0.00%	\$76,725	0.00%	0	\$75,611	\$64,409		0	\$76,725	\$12
...	...			...	\$0	\$0	0.00%	\$107,500	0.00%	0	\$110,000	\$93,000		0	\$107,500	\$12

- Carryover or roll-over awards are computed for those employees who receive CRI and are on retained pay, hit a pay cap, or have their CRI override flag set to 1
- Total Awards greater than \$10,000 require special approval

	A	B	C	D	E	DI	DJ	DK	DL	DM	DN	DO	DP	DQ	DR	DS					
1	<a href="#">Return to Main Menu</a>	<a href="#">Edit Parameters</a>				Set Award 1.23%	Total Carryover Award = \$0			Available Award Dollars = \$35,670.31			Your available award dollars includes all unspent allocation but have not yet allocated it, the amount here as well as in your CRI remainder. As you as a discretionary CRI money, your available award dollars down.								
2							Total CA Pos Delta Y = \$525,235			Discretionary Set-Aside = \$89											
3							Total Default Award = \$35,563			Alpha2 = 0.067743											
4	<a href="#">Goto</a>						Total Discretionary Award = \$0														
5	<a href="#">Scores GPI</a>						Total Award = \$35,412														
6	<a href="#">CRI Awards</a>																				
7	Blue arrows indicate fields set to filter the data.																				
8																					
	Last Name	First Name	Middle Initial	Suffix	CAS2Net ID	Carryover Award	CA Pos Delta Y	Computed Award	PPM Inpr. Discretionary Award	Total Award	WildCard 6	Award > \$10K?	Appraisal Rating?	Total New Comp. Base Pay + Awd	WildCard 7						
9																					
10																					
11	Freeman	Francis			2	\$0	\$26,959	\$1,826	\$0	\$1,826			5	\$127,144							
12	Curtiss	Dan			4	\$0	\$31,207	\$2,114	\$0	\$2,114			5	\$165,389							
13	Evans	Francis			5	\$0	\$0	\$0	\$0	\$0			3	\$107,107							
14	Gonzalez	Helen			6	\$0	\$7,594	\$514	\$0	\$514			4	\$107,621							
15	Iverson	John			7	\$0	\$0	\$0	\$0	\$0			4	\$125,000							
16	Quarles	Richard			11	\$0	\$17,331	\$1,174	\$0	\$1,174			5	\$80,378							
17	Stewart	Tammy			12	\$0	\$21,139	\$1,432	\$0	\$1,432			5	\$81,479							
18	Udell	Vincent			13	\$0	\$0	\$0	\$0	\$0			4	\$76,725							
19	Babbitt	Chris			15	\$0	\$17,063	\$1,155	\$0	\$1,155			5	\$108,655							
20	Filee	George			17	\$0	\$8,446	\$572	\$0	\$572			4	\$77,808							

The Appraisal Rating column is computed based on the guidance from the Federal Register and can take on the values of 1, 3, 4, or 5 where 1 is Unsatisfactory.

An employee whose OCS is less than or equal to the scores in the table below will be placed on a Mandatory Contribution Improvement Plan (CIP)

**CIP Triggers**

BroadBand	NH	NJ	NK
1	0	0	0
2	14	14	14
3	44	36	34
4	72	54	

DQ	DR	DS	DT	DU	DV	DW
----	----	----	----	----	----	----

Your available award dollars includes all unspent CRI. Therefore, if you have set CRI money aside for discretionary allocation but have not yet allocated it, the amount will show up here as well as in your CRI remainder. As you allocate your discretionary CRI money, your available award dollars will go down.

Appraisal Rating?	Total New Comp. Base Pay + Awd	WildCard 7	CY2013 Expected OCS	CIP Trigger	Mandatory CIP	Wildcard 8
5	\$127,144		98	72	0	
5	\$165,389		100	72	0	
3	\$107,107		90	72	0	
4	\$107,621		90	72	0	
4	\$125,000		98	72	0	
5	\$80,378		75	44	0	
5	\$81,479		76	44	0	
4	\$76,725		74	44	0	
5	\$108,655		83	44	0	
4	\$77,808		74	44	0	
5	\$70,189		68	44	0	
4	\$48,396		50	14	0	
4	\$76,725		74	44	0	
4	\$77,808		74	44	0	
5	\$51,100		52	14	0	

# Pay Pool Meeting: Check Delta Stats Scores

Return to Main Menu  
View Delta OCS Distribution

Delta Plot Grouping  
 Supervisor  
 Wildcard 1  
 Refresh Show All Hide w err

Summary Statistics of Delta OCS Score

	Average Delta OCS Score	Standard Deviation
<b>Overall</b>	1.21	4.09
<b>NH</b>	0.79	4.63
<b>NJ</b>	1.60	1.67
<b>NK</b>	2.83	2.14

		Average Delta OCS Score	Standard Deviation	Total
<b>NH</b>	0			
Bob Arnold		1.00	1.00	3
Chris Babbitt		3.00	N/A	1
Dan Curtiss		0.33	0.58	3
Eileen Daniels		4.00	N/A	2
Francis Evans		-18.00	N/A	1
George Fites		1.00	1.41	2
Helen Gonzalez		11.00	N/A	1
Ike Hansen		-4.00	N/A	1
John Iverson		1.00	N/A	1
Larry Koenig		1.50	0.71	2
Nancy Michelson		4.00	N/A	1
Peter Olson		1.00	0.00	2
Richard Quarles		-5.00	N/A	1
Tammy Stewart		0.33	0.58	3
Vincent Udell		2.50	2.12	2
		2.33	2.52	3
<b>NJ</b>				
Bob Arnold		3.00	N/A	1
John Iverson		3.00	N/A	1
Zane Yates		0.67	1.53	3
<b>NK</b>	0			
Bob Arnold		1.00	1.41	1
Ike Hansen		7.00	N/A	1
Richard Quarles		3.00	N/A	1
Tammy Stewart		1.00	N/A	1
Vincent Udell		2.00	N/A	1

Contents Parameters Data Matrix Rails **Delta Stats** Delta Plot Cur OCS

Look for extreme or unusual average delta OCS values by supervisor

# Pay Pool Meeting: Check Rank Ordered Data

1 [Return to Main Menu](#)

2 [Return to Data](#)

3

4 Factor Matrix

5 [All](#) [N](#) [NJ](#) [N](#)

6

7 Each list gives the name and integer score on the factor. Use the buttons to rank order the lists by integer score.

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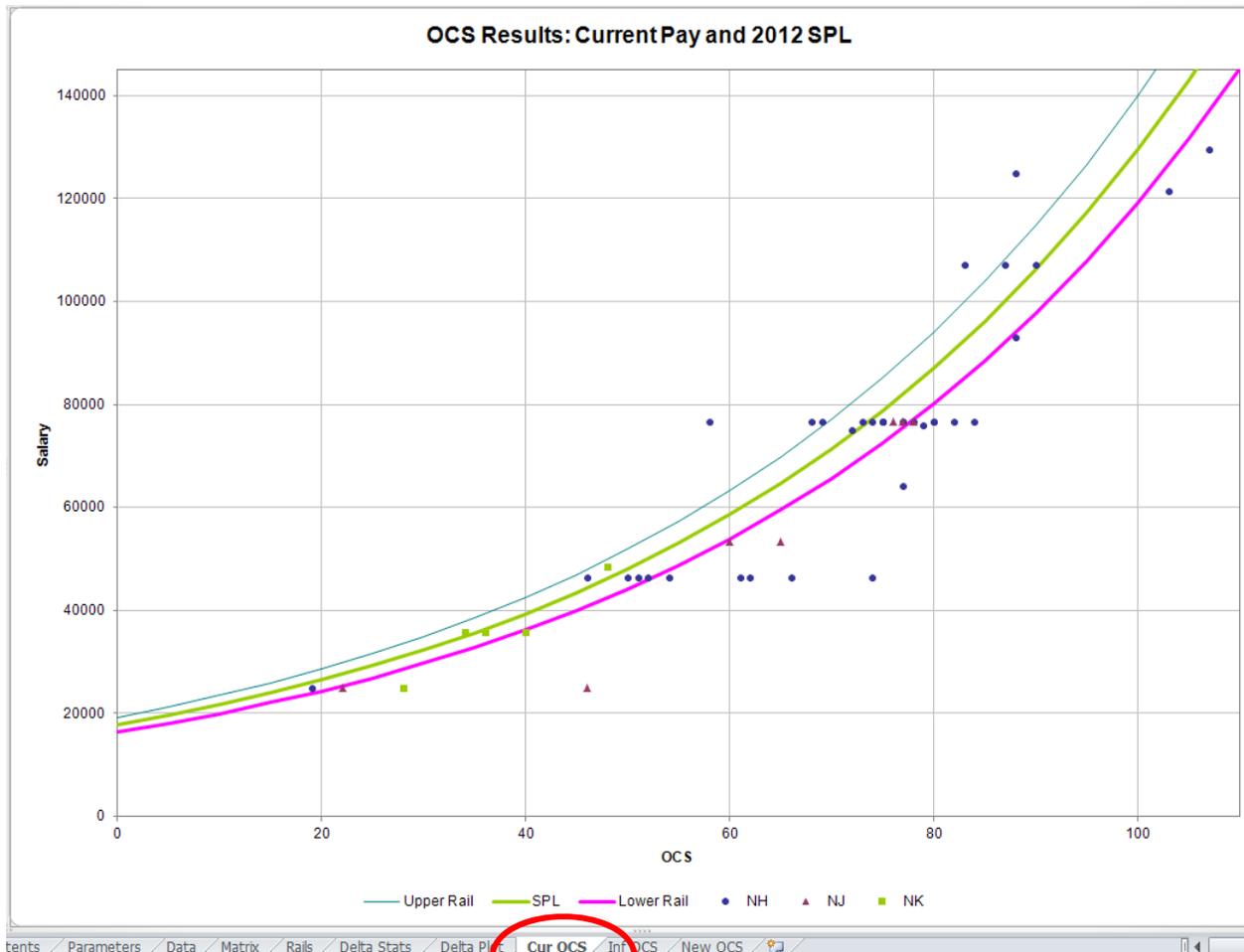
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Ready

Contents Parameters Data **Matrix** Rank Delta Stats Delta Plot Cur OCS Inf OCS New OCS

In the Matrix worksheet, check scores by career path and factor

## Pay Pool Meeting: Check Current OCS Results



- Check where overall contribution scores for current pay plot against new upper rail, lower rail and SPL
- If there are fewer than 255 employees in the pay pool, hovering the mouse over the dot will display the employee's name

## Pay Pool Meeting: Change Scores

					AD	AE	AF	AG	AH	AI	AJ	AK	AL	AM	AN	AO	AP
<a href="#">Return to Main Menu</a> <a href="#">Edit Parameters</a> Goto <a href="#">Scores</a> <a href="#">GPI</a> <a href="#">CRI Awards</a> Blue arrows indicate fields set to filter the data.					Set Scores	Categorical Scores						Final Scores					
Last Name	First Name	Middle Initial	Suffix	CAS2Net ID		prb solving	team wk	cust rtns	leadership	comm	rsrc mgmt	prb solving	team wk	cust rtns	leadership	comm	rsrc mgmt
1	Hansen	Ike			18							74	81	80	79	76	73
2	Artis	Amy			19	2MH	2MH	2MH	2MH	2MH	2MH	54	54	54	54	54	54
3	Celon	Connie			21												
4	Evans	Erin			23							83	82	72	65	73	75

- Change scores directly on the Data worksheet
- If Categorical Scores are used, change them first and then use the drop down list to change the numerical score

## Uploading Data Back to CAS2Net

**Compensation Management Spreadsheet**

Cycle: 2012    Version: 1.0

*The purpose of this spreadsheet is to record appraisal scores and set basic pay rates and contribution-based financial awards.*

**Data/Spreadsheet Download** -- Download the data file from the website, then click on Import to load the file into this spreadsheet.

**Appraisal Score Entry** -- Once the file has been loaded, assign categorical and final scores for each factor, and view reports and graphs.

**Score Normalization** -- Compare score distributions to look for anomalies and scale differences. Run preliminary pay adjustment scenarios. Set CRI and CA parameters and assign pay outs to employees.

**Data Maintenance** -- All additions, deletions, and modifications must be done in the central database. All columns except for data entry and "wild-card" are locked. To preserve your work, export the data from this spreadsheet and upload to the central database before changing any information in the database.

**Final "G" Setting** -- This spreadsheet comes with a best estimate of "G." Once you have been notified that "G" is set, make a final round trip to CAS2Net. The final "G" value and related parameters will be included in the download of your paypool data.

**Final Compensation Setting** -- After the final round trip to update "G", finalize the pay adjustments and awards for your paypool.

**Data Upload** -- Use Export to create a file for uploading the results from your pay pool to the central database on the website.

**Generate Part 1's** -- First use the filters to select employees; sort data by preferred order; then click on the Generate Part I to generate Part I of the Appraisal Form for each selected employee.

**Paypool Data**  
[Import](#)   [View](#)   [Export](#)   Last Import: 9/20/2012 (1:38:29 PM)(CDT)  
 Last Export:    Last Modified:    Use Today

**Parameters**  
[Set CRI and CA Parameters](#)

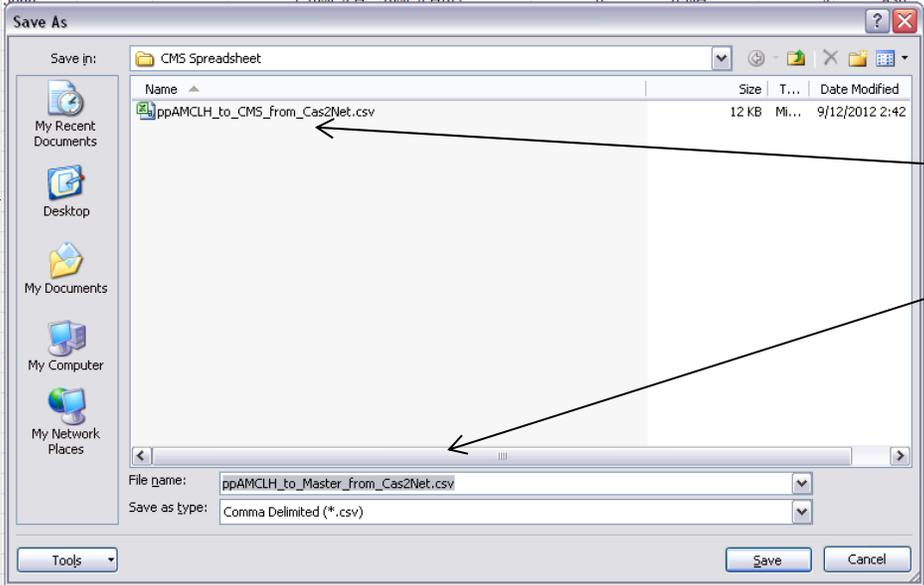
**Summary Reports**  
[Rails Report](#)  
[Career Path Factor Matrices ranked by Final Score](#)  
[Summary Statistics of Delta OCS](#)  
[Distribution of Delta OCS](#)

**Scatter-plots of OCS Score by Salary**  
[Current Pay & 2012 SPL](#)   [Inferred](#)   [New Pay & 2013 SPL](#)

**Part 1 of Appraisal Forms**  
[Open Existing Evaluation](#)  
 Generate Part 1 of Appraisal Form for selected individuals by sort order  
 Use the filters to select individuals then sort data by preferred order  
[Generate Part 1 of Appraisal Forms](#)

From the Contents worksheet, click on the Export button to create an export CSV file

A	B	C	D	E	F	G	H	I	J	K	L	M	N			
G%	GS-1/step	GS-1/step	CRI%	CRI Set-A:	Award%	Award Set Beta 1 (CF	Beta 2 (Aw	Minimum (	Minimum (	Minimum /G	carry on	CRI remain	A			
0	17803	17803	2.1	0.2	1.2324	0.25	0	1	50	75	100	0	149.13			
Last Name	First Name	Middle	Initi	Suffix	CAS2Net	Paypool	Office Syn	Wildcard	1 Presumptn	Retained	F Career	Pat Broadband	Occ Series	CY2012 B:	L	
Freeman	Francis				2 AMC/LH	AMC/LH			0	0 NH		4	318	121500	L	
Curtiss	Dan				4 AMC/LH	AMC/LHA	CCAS 081		0	1 NH		4	830	163275	L	
Evans	Francis				5 AMC/LH	AMC/LHX			0	0 NH		4	830	107107	L	
Gonzalez	Helen				6 AMC/LH	AMC/LHAC			0	0 NH		4	340	107107	L	
Iverson	John				7 AMC/LH	AMC/LHAD			0	0 NH		4	830	125000	V	
Quarles															76725	L
Stewart															76725	L
Udell															76725	L
Babbitt															107500	Z
Fites															76725	L
Hansen															64292	L
Artis															46401	L
Celon															76725	L
Evans															76725	L
Farnsworth															46401	L
Grimes															46401	L
Harris															46401	L
Jerris															76725	L
Lawrence															76725	L
Martinez															76725	L
Nance															76725	L
Sorenson															76725	L
Tarman															76725	L
Ulanov															46401	L
Vinson															76725	L
Yeakley															76725	L
Zurbriggen															46401	L
Butler															76725	L
Cavasos															46401	L
Emerson															46401	L
Michelson															107107	L
Burns															46401	L
Hoang															24837	V
Hummer															76000	V
Mucker	Mark				2613	AMC/LH	AMC/LH		1	0 NH		3	505		75000	V



- Save the CSV file in a protected folder
- Note: CMS Spreadsheet applies built-in naming convention functionality to generate filename

Civilian Acquisition Workforce Resource  
Demonstration Project, Department of Defense (DOD)

### Offline Interface

**Employee Menu**

- Contribution Planning
- Mid-Point Review Self-Assessment
- Annual Appraisal Self-Assessment
- Reports

**Superuser Menu**

- Appraisal Status and Lock
- Reports
- Data Maintenance
- Session Maintenance
- Offline Interface**

**Offline Interface Menu**

Pay Pool: AMC/LH

Download Employee Data

Last completed download (Eastern Time): 12-SEP-2012 04:20:00 PM

**Upload Employee Data**

Last completed upload (Eastern Time): 17-AUG-2012 03:59:51 PM

Final certification is disabled.

Civilian Acquisition Workforce Personnel  
Demonstration Project, Department of Defense (DOD)

Acq  
Demo

You are active  
Revert | Change Settings

**Offline Interface - Upload**

Specify AMC/LH upload file:

[ Return to Offline Interface Main Menu ]

**Employee Menu**

- Contribution Planning
- Mid-Point Review Self-Assessment
- Annual Appraisal Self-Assessment
- Reports

**Superuser Menu**

- Appraisal Status and Lock
- Reports
- Data Maintenance
- Session Maintenance
- Offline Interface**
- Paypool Notices
- Demo Reset

Select saved CSV file and Upload to complete the process

Make sure you organize the records in the data tab in the order you want them printed

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
1	<b>Compensation Management Spreadsheet</b>															
2	Cycle: 2012	Version: 1.0														
3	<i>The purpose of this spreadsheet is to record appraisal scores and set basic pay rates and contribution-based financial awards.</i>															
4																
5	<div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"> <p><b>Data/Spreadsheet Download</b> -- Download the data file from the website, then click on Import to load the file into this spreadsheet.</p> <p><b>Appraisal Score Entry</b> -- Once the file has been loaded, assign categorical and final scores for each factor, and view reports and graphs.</p> <p><b>Score Normalization</b> -- Compare score distributions to look for anomalies and scale differences. Run preliminary pay adjustment scenarios. Set CRI and CA parameters and assign pay outs to employees.</p> <p><b>Data Maintenance</b> -- All additions, deletions, and modifications must be done in the central database. All columns except for data entry and "wild-card" are locked. To preserve your work, export the data from this spreadsheet and upload to the central database before changing any information in the database.</p> <p><b>Final "G" Setting</b> -- This spreadsheet comes with a best estimate of "G." Once you have been notified that "G" is set, make a final round trip to CAS2Net. The final "G" value and related parameters will be included in the download of your payroll data.</p> <p><b>Final Compensation Setting</b> -- After the final round trip to update "G", finalize the pay adjustments and awards for your payroll.</p> <p><b>Data Upload</b> -- Use Export to create a file for uploading the results from your pay pool to the central database on the website.</p> <p><b>Generate Part 1's</b> -- First use the filters to select employees; sort data by preferred order; then click on the Generate Part I to generate Part I of the Appraisal Form for each selected employee.</p> </div> <div style="width: 50%;"> <p><b>Paypool Data</b> <span style="float: right;">Last Import: 9/20/2012 (1:38:29 PM)(CDT)</span></p> <p style="text-align: center;"><a href="#">Import</a> <a href="#">View</a> <a href="#">Export</a></p> <p style="text-align: right;">Last Export: <input type="text"/> Last Modified: <input type="text"/> <input type="button" value="Use Today"/></p> <p><b>Parameters</b></p> <p style="text-align: center;"><a href="#">Set CRI and CA Parameters</a></p> <p><b>Summary Reports</b></p> <p style="text-align: center;"><a href="#">Rails Report</a></p> <p style="text-align: center;"><a href="#">Career Path Factor Matrices ranked by Final Score</a></p> <p style="text-align: center;"><a href="#">Summary Statistics of Delta OCS</a></p> <p style="text-align: center;"><a href="#">Distribution of Delta OCS</a></p> <p><b>Scatter-plots of OCS Score by Salary</b></p> <p style="text-align: center;"><a href="#">Current Pay &amp; 2012 SPL</a>   <a href="#">Inferred</a>   <a href="#">New Pay &amp; 2013 SPL</a></p> <p><b>Part 1 of Appraisal Forms</b></p> <p style="text-align: center;"><a href="#">Open Existing Evaluation</a></p> <p style="text-align: center;">Generate Part 1 of Appraisal Form for selected individuals by sort order <i>Use the filters to select individuals then sort data by preferred order</i></p> <p style="text-align: center;"><b><a href="#">Generate Part 1 of Appraisal Forms</a></b></p> </div> </div>															
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BACKUP

- **CRI %** - The pay pool's overall CRI budget, expressed as a percent of total annual base pay in the pay pool as of 30 September 2005. This value must be at least 2.0 percent, which is also the default value. The two cells to the right of the percent show the dollar amount of the resulting CRI budget, and the enhanced CRI budget including unspent GPI money.
- 
- **CRI Set-Aside** - The percent of the pay pool's overall CRI budget that is set aside for discretionary allocation by the pay pool manager. The default is 0.0 percent. You have the option of entering this value as a percent or dollar amount. The default algorithm built into the spreadsheet allocates the remaining budget.
- 
- **Awd %** - The pay pool's overall CA budget, expressed as a percent of total annual base pay in the pay pool as of 30 September 2005. This value must be at least 1.0 percent, which is also the default value. In accordance with the AcqDemo **Federal Register** announcement, the value specified here is automatically multiplied by .9 to establish the CCAS award budget used in the workbook. The other 10 percent of the award funding is reserved for non-CCAS awards throughout the year. The two cells to the right of the percent show the dollar amount of the resulting CCAS CA budget, and the enhanced CA budget including unspent CRI money.
- 
- **Awd Set-Aside** - The percent of the pay pool's overall CA budget that is set aside for discretionary allocation by the pay pool manager. The default is 0.0 percent. You have the option of entering this value as a percent or dollar amount. The default algorithm built into the spreadsheet allocates the remaining budget.
- 
- **Beta 1 (CRI)** – Establishes target pay for CRI allocation as follows:
  - 1 = upper rail
  - 0 = SPL (default value)
  - -1 = lower rail
- 
- **Beta 2 (CA)** – Establishes target pay for CA allocation as follows:
  - 1 = upper rail
  - 0 = SPL (default value)
  - -1 = lower rail
- 
- **Minimum CRI Dollar Amount** – Any calculated CRI amounts below this minimum will be set to zero and the money added to the discretionary CRI remainder for allocation to other employees. The default is \$0.
- 
- **Minimum CA Dollar Amount** – Any calculated CA amounts below this minimum will be set to zero and the money added to the discretionary CA remainder for allocation to other employees. The default is \$0.