

## Overview

### Introduction

Compensation data in HCP includes all expenses for employees within the Planned Home Department (PHD) regardless of the funding entity. Compensation data reflected in CalPlan forms and CalPlanning reports (CalRptg and HCPRptg) only includes distributed expenses funded by any DeptID under 1\_UCBKL.

### Key CalPlanning Compensation Definitions

- **Human Capital Planning (HCP):** Compensation planning tool to create budget plans using Employee & Position data.
- **Entity:** Represents organizational units, which can be total campus, divisions, and DeptIDs. Sourced from BFS.
- **MyOrg:** This user variable is populated with a high-level Parent Entity to populate a list of Child Entities in forms for use in Planning.
- **Plan Home Department (PHD):** The HCP DeptID field on which planner security is based. Only planners with security access to that PHD can view and edit that position's data in HCP.

### Understanding CalPlanning Compensation data

CalPlanning utilizes two different security models, one for HCP, and a second for CalPlan, CalRptg and HCPRptg. HCP allows planners to view data and plan position/employees 'owned' by a particular DeptID. The HCP DeptID where the position is managed is known as the Planned Home Department (PHD). Planners with security access to a PHD have access to plan the employee/position data in its entirety, even if the employee is paid partially or fully from another DeptID or unit.

### Key CalPlanning Compensation Concepts

- When a planner sets User Preferences in CalPlanning, the Entity/MyOrg selected sets both the HCP PHD and CalPlan Entity for planning ease.
- HCP displays all employees and positions with a PHD in the entity the planner has set as their MyOrg in CalPlanning Preferences.
- HCP also displays all of those employees' compensation expenses even if a percentage or all of those compensation expenses are funded from an entity outside of their MyOrg.
- **Compensation data in CalPlan forms and CalRptg reports at the DeptID level will only reflect the compensation expenses funded from that DeptID.**
- HCPRptg reports will only include the employees with Compensation Expenses funded from the Entity selected in the report POV.
- Cal Plan/CalRptg reports reflect the same data as HCPRptg reports based on the entity selected. The data matches HCPRptg but is summarized at the DeptID level.

### Content Overview

When is your view Plan Home Department vs Distribution Entity based?

Viewing Compensation Data in HCP (PHD)

- Manage Existing Employees and Positions Form
- DeptID Comp Adjustments Form
- Employee Position Distribution Compensation Expense Form

Viewing Compensation Data in CalPlan, CalRptg & HCPRptg (Distribution Entity)

- HCPRptg vs. Manage Existing Employees and Positions Form

**Security Access**

This job aid is relevant if you have Planner or Reporting Only access.

**Questions**

If you have any questions, please email [calplanhelp@berkeley.edu](mailto:calplanhelp@berkeley.edu)

## Plan Home Department vs. Distribution Entity

### Viewing Compensation Data in HCP (PHD)

HCP displays data by PHD, whereas CalPlan, CalRptg, and HCPRptg all display compensation data by Distribution Entity. This means that compensation by distributed Entity might differ from compensation by PHD.

### Manage Existing Employees and Positions Form

The Manage Existing Employees and Positions form in HCP displays the list of employees and their associated annual salaries within the MyOrg. It is an employee roster that provides a snapshot of all the employees within your unit for the fiscal year. The compensation-related pieces of the Manage Existing Employees and Positions form are explained below.

**REG Salary Expense** displays the total salary expense for all individuals in the PHD even if some of the expenses are funded from outside the PHD. In the screenshot below of the Manage Existing Employee and Position form set to MyOrg: 1\_31658, all employees listed have a PHD = 1\_31658 and total salary for each person is displayed and includes total \$ distributions for all orgs.

HCP also pro-rates data for:

- partial month or partial fiscal year appointment dates
- FTE <1

**Average FTE** displays Average FTE for PHD for all individuals in the PHD.

- Averages based upon appointment dates during the fiscal year
- Does not pro-rate for partial months. If appointment dates include any days in the month, the displayed FTE includes that month. For example, if appointment date begins on 9/25, the month of Sept is included in this Average FTE.
- A complex enhancement is underway to change this, but presently, FTE is always linked to PHD.

		Name	Position Title	Appointment Start Date	Appointment End Date	Appointment Type	Average FTE	Yr End Status	REG Salary Expense
E010	1_31658	[REDACTED]	Information Syst...	12/01/2012	12/31/2099	Career	1	Active	140,421
E012	1_31658	[REDACTED]	Business System...	9/28/2015	8/15/2016	Contract	0.83	Active	97,608
E012	1_31658	[REDACTED]	Business System...	10/13/2014	12/31/2099	Career	1	Active	135,250

### DeptID Comp Adjustments Form

The DeptID Comp Adjustments form is another form in HCP. All expenses on all entities associated with the employees in a Plan Home Dept display in the Employee Comp Expense field on the Dept ID Comp Adjustments form. This is the aggregate of employee expenses displayed on the Manage Existing

**Employee Comp Expense:** Sums expenses from the Manage Existing Employee and Position form.  
**541,068 = 203,540 + 141,483 + 196,045**

MyOrg: 1_31658	Current Scenario: Forecast	Current Stage: Working
Employee Comp Expense	Dept ID Adjustments	Total Comp Expense
1_31658 - BJSPM Financial BI Ops	541,068	21,743
		562,811

Employee Name	Position Title	Appointment Start Date	Appointment End Date	Appointment Type	Average FTE	Yr End Status	REG Salary Expense	Total Compensation
[Redacted]	Information Syst...	12/01/2012	12/31/2099	Career	1	Active	140,421	203,540
[Redacted]	Business System...	9/28/2015	8/15/2016	Contract	0.83	Active	97,608	141,483
[Redacted]	Business System...	10/13/2014	12/31/2099	Career	1	Active	135,250	196,045

### Employee Position Distribution Compensation Expense Form

The Employee Position Distribution Compensation Expense form in HCP displays all expenses of an employee by distribution, including all Distribution Entities for the employee. It doesn't show the calculated distributed compensation by Entity like CalPlan, CalRptg, and HCPRptg, but it displays all the distributions for an employee in your PHD, including the distributions with entities that sit outside of the PHD.

The entity listed at the top of the form displays the PHD but the employee data displayed in the form is not limited to PHD. You can see below that in September this employee has 2 distributions, and the first distribution's DeptID is not their Plan Home Department.

Month	Distribution	Distribution Account	Distribution Entity	Distribution Fund	Distribution Chart1	Distribution Percentage	Distribution Amt.
September	1st Distribution	A51210	1_31657	19900	C1_SUMPLN	50	54.17
	2nd Distribution	A51210	1_31658	19900	C1_SUMPLN	50	54.17
October	1st Distribution	A51210	1_31657	19900	C1_SUMPLN	50	5,416.67
	2nd Distribution	A51210	1_31658	19900	C1_SUMPLN	50	5,416.67
November	1st Distribution	A51210	1_31657	19900	C1_SUMPLN	50	5,416.67
	2nd Distribution	A51210	1_31658	19900	C1_SUMPLN	50	5,416.67

**Viewing Compensation Data in CalPlan, CalRptg & HCPRptg (Distribution Entity)**

During the CalPlanning data push (every 3 hours starting at 9:00am -9:00pm), the salaries for each employee and position are calculated based on their Distribution Entities and pushed from HCP to HCPRptg and to CalPlan and then CalRptg. These distributed compensation expenses may differ from their PHD expenses if the Distribution Entities differ from their PHD entities.

**HCPRptg vs. Manage Existing Employees & Position Form**

The salaries on the Manage Existing Employee & Position Form = the salaries on the HCP001 Employee Salary by Fund Group report as long as the user has security access to see all the distribution lines. If an employee with a PHD in your entity has a Distributed Expenses funded from outside your entity those expenses will not be include on the HCP001 report.

For example:

- Planner CalPlan/HCP org access = 1\_31658
- Employee Oski Bear’s PHD = 1\_31658
- Oski Bear’s HCP Distribution = 1\_31657
- Oski Bear’s employee and position details and his Salary Expense will be displayed on the Manage Existing Employee & Position Form. Oski Bear and his salary expense will not appear in HCPRptg and his salary expense will not be included in the summarized 1\_31658 Compensation Expenses in CalPlan.

In HCPRptg, the Planner will see all expenses that are charged to 1\_31658 because that is what that particular Planner’s HCPRptg access allows. If the Planner had HCPRptg access to 1\_BJSPM, the L6 entity under which both 1\_31657 and 1\_31658 reside, they would see the entire salary expense in HCPRptg.

Example:

HCPRptg HCP001 – distributed expenses -shows total L6 if planner has HCPRptg access to see this.

UC Berkeley 1_BJSPM - Strategic Program Management Year Total Forecast		Employee Salary by Fund Group Salaries & Wages				
		Total FY 2015-16	Unrestricted		Rest Rest Endow and Fu	
		Current Funds	Unrestricted	Designated	Restricted Gift Funds	
	Information Systems Analyst 4 (P00017030)	140,421	140,421	-	-	
	Business Systems Analyst 4 (P00036113)	97,608	97,608	-	-	

HCP001 – distributed expenses for an org – shows only salary expense that falls into the entity listed.

UC Berkeley 1_31658 - BJSPM Financial BI Ops Year Total Forecast		Employee Salary by Fund Group Salaries & Wages				
		Total FY 2015-16	Unrestricted		Re Re Endow an f	
		Current Funds	Unrestricted	Designated	Restricted Gift Funds	
	Information Systems Analyst 4 (P00017030)	140,421	140,421	-	-	
	Business Systems Analyst 4 (P00036113)	48,804	48,804	-	-	

Manage Existing Employee and Position form display the list employee from the example above and their associated annual salary, regardless of their Distribution Entities.

The screenshot shows a web application interface for 'Task List Status' with a sub-tab 'Task - Manage Existing Employees and Positions'. Below the sub-tab is a table of employees. A red box highlights the 'REG Salary Expense' column for the second employee.

		MyOrg: 1_31658				2015-16			
Employee ID	Employee Name	Position Title	Appointment Start Date	Appointment End Date	Appointment Type	Average FTE	Yr End Status	REG Salary Expense	Total Compensation
80	[REDACTED]	Information Syst...	12/01/2012	12/31/2099	Career	1	Active	140,431	203,540
83	[REDACTED]	Business System...	9/28/2015	8/15/2016	Contract	0.83	Active	97,608	141,483
84	[REDACTED]	Business System...	10/13/2014	12/31/2099	Career	1	Active	135,250	196,045

Manage Existing Employee and Position form-> Employee Details, HCP Empl Distribution shows split costed distributions:

The screenshot shows a web application interface for 'HCP Empl Distributions'. Below the sub-tab 'HCP Empl Distributions' is a table of distribution accounts. A red box highlights the 'Distribution Entity Desc' column for the first distribution.

	Distribution Account Desc	Distribution Entity Desc	Distribution Fund Desc	Distribution Chart1 Desc	Distribution Start Date	Distribution End Date	Distribution Percentage
1st Distribution	51210 - Staff-Regular (Default)	1_31657 - JSPM CalPlanning Operatio...	19900 - GENERAL FUN...	C1 - Summary - Plan	9/28/2015	8/15/2016	50
2nd Distribution	51210 - Staff-Regular (Default)	1_31658 - JSPM Financial BI Ops	19900 - GENERAL FUN...	C1 - Summary - Plan	9/28/2015	8/15/2016	50