



CWB

Oracle Compensation Workbench *for Department Directors*



Montgomery County Government

CWB Director's Guide 2015

June 11, 2015

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Ch 1: CWB Introduction

This chapter summarizes the basic information required to understand the performance-based pay process and compensation system. This chapter contains:

- ✓ CWB Definition
- ✓ Director Tasks for CWB
- ✓ Pay for Performance Timeline

CWB Definition

CWB stands for Compensation Workbench. It is an Oracle module used to manage various forms of compensation.

- Payroll uses CWB to issue GWA, GSS Longevity, MLS Base Pay and Lump Sum payments.
- Directors use CWB to allocate MLS Base Pay increases and Lump Sum payments
- OHR & the CAO use CWB to evaluate and approve proposed allocations submitted by Department Directors.

CWB relies on the ratings from performance appraisals in Workforce Performance Management (WPM) to set MLS Pay for Performance allocation limits.

Director Tasks

Directors are required to complete the following tasks no later than **July 1, 2015**:

- 1) **Allocate** Base Pay and/or Lump Sum payments in CWB for all eligible MLS in your department.
- 2) **Submit** Pay Allocations to the CAO for review and approval.
- 3) **Communicate** allocations to employees following CAO approval. Employees must be communicated to no later than Aug 5th as employees will be able to view on payslip Aug 6th.)



Timelines & Deadlines

Below is a timeline for Performance-based Pay activities:

Complete	MLS performance appraisals rated, approved and finalized
Jun 11 – Jul 01	Directors enter pay recommendations into CWB
Jul 8	OHR reviews and submits Director pay recommendations to CAO
Jul 24	OHR communicates CAO approval to Directors
Jul 24 - Aug 05	Directors distribute approved pay award statements to employees.
Aug 06	Employees can review pay awards on Oracle Payslip
Aug 07	Pay Date



Ch 2: Merit Guidelines

This chapter is a summary of the merit guidelines around which CWB has been configured. Included topics are:

- ✓ OHR Guidelines, including location of applicable policy.

OHR Guidelines

Merit Guidelines in CWB are based on a combination of performance ratings entered into the performance management system (WPM) and the employee's current Pay Band penetration:

Overall performance rating:	If employee's salary is below 90 percent of pay band	If employee's salary is at or above 90 percent of pay band	If employee's salary is at top of pay band
Exceptional Performance	Employee is eligible for an addition to base salary and lump-sum award. The total of the addition to base salary and lump-sum award must not exceed 6 percent of base salary.	Employee is eligible for an addition to base salary and lump-sum award. The total of the addition to base salary and lump-sum award must not exceed 4 percent of base salary.	Employee is eligible for a lump-sum award not to exceed 4 percent of base salary.
Highly Successful Performance	Employee is eligible for an addition to base salary and lump-sum award. The total of the addition to base salary and lump-sum award must not exceed 4 percent of base salary.	Employee is eligible for an addition to base salary and lump-sum award. The total of the addition to base salary and lump-sum award must not exceed 3.5 percent of base salary.	Employee is eligible for a lump-sum award not to exceed 3.5 percent of base salary.
Successful Performance	Employee is eligible for an addition to base salary and lump-sum award. The total of the addition to base salary and lump-sum award must not exceed 3.5 percent of base salary.	Employee is eligible for a lump-sum award not to exceed 2 percent of base salary.	Employee is eligible for a lump-sum award not to exceed 2 percent of base salary.
Below Expectations	Employee is not eligible for performance-based pay.	Employee is not eligible for performance-based pay.	Employee is not eligible for performance-based pay.
Does Not Meet Expectations	Employee is not eligible for performance-based pay.	Employee is not eligible for performance-based pay.	Employee is not eligible for performance-based pay.

For policy information, refer to the MLS Performance Pay Regulations
 Location: Montgomery County Government (MCG) Personnel Regulations, Section 10-10, starting on page 103



Ch 3: Column Definitions

The pay allocation page within CWB has a series of columns that display information you may require to make informed pay recommendations to the CAO. Therefore, this chapter includes:

- ✓ Column Definitions for the *Compensation Allocation* page

Column Name / Definition

Current Year Base Salary

Current base salary

Department Director or Approver

Person assigned to allocate pay recommendations, i.e. you

Employee Name

The name of the MLS employee

MLS employees that are eligible for pay awards and those that are not eligible will both display on the *Compensation Allocation* page

Employee Number

The employee's unique HR employee number.

Fiscal Year Performance Rating

Overall Rating on the employee's performance evaluation for the current fiscal year

Grade

Pay grade

History

The icon in this column opens a page that displays a history of pay changes the employee has received. It includes the date, change amount and frequency of the changes.



Leave Blank

Blank column used to separate columns to add visual space.

Lump Sum %

Editable field where Directors indicate, by percentage, what portion of the employee's Merit Guideline they choose to apply toward a one-time, Lump-Sum payout. Default is 0.

This field will auto calculate if a dollar amount is entered into the 'Lump Sum Amount' field.

NOTE: Any allocations entered are not final until approved by the CAO.

Lump Sum Amount

Editable field where Directors indicate, by dollar amount, what portion of the employee's 'Merit Guideline' they choose to apply toward a one-time, Lump-Sum payout. Default is 0.

This field will auto calculate if a percentage is entered into the 'Lump Sum %' field.

NOTE: Any allocations entered are not final until approved by the CAO.

Maximum Dollar Amount Increase Allowed to Base

The maximum, by dollar amount, that can be awarded to the employee as a base pay increase.

Merit Guideline

The maximum percentage, including both Base Pay and Lump Sum, which can be awarded to the employee.

Next Fiscal Year Base Increase %

Editable field where Directors indicate, by percentage, what portion of the employee's Merit Guideline they choose to apply toward a base pay increase. Default is 0.

This field will auto calculate if a dollar amount is entered into the 'Next Fiscal Year Base Increase Amount' field.

NOTE: Any allocations entered are not final until



approved by the CAO.

Next Fiscal Year Base Increase Amount

Editable field where Directors indicate, by dollar amount, what portion of the employee's 'Merit Guideline' they choose to apply toward a base pay increase. Default is 0.

This field will auto calculate if a percentage is entered into the 'Next Fiscal Year Base Increase %' field.

NOTE: Any Allocations entered are not final until approved by the CAO.

Next Fiscal Year Projected Min-Max Salary for Assigned Grade

Pay Band (sometimes referred to as 'pay scale' or 'pay range') for the next fiscal year

Next Fiscal Year Projected Pay Band Penetration.

This percentage indicates next fiscal year's projected salary penetration percentage of each pay band, which includes the current base salary, GWA and projected base salary increase. This column correlates with the 'Next Fiscal Year Projected Min-Max Salary for Assigned Grade' column.

Next Fiscal Year Revised Base Salary

The base pay amount recalculated based on your base pay allocations. It includes the employee's current base pay, General Wage Adjustment (GWA) and any allocations you entered for base pay increase.

If no base pay increase is allocated, the amount in this field will match the 'Projected Base Salary with GWA' field.

Notes

The icon in this column opens a page that displays a freeform text box into which notes can be entered. There is also a mechanism to attach documents, if desired.



Organization

The organization or department sub-section to which the employee is assigned.

Process Error Message

Usually blank, this field will display an error message if an attempt is made to save an allocation that exceeds the employee's Merit Guideline.

Projected Based Salary with GWA

The amount in the 'Current Year Base Salary' column plus the upcoming General Wage Adjustment (GWA).

Projected Pay Band Penetration

The next fiscal year's projected salary penetration percentage of each pay band which includes the next fiscal year's General Wage Adjustment (GWA). This column correlates with the 'Next Fiscal Year Projected Min-Max Salary for Assigned Grade' column.

Remaining Amount Available for Allocation

Based on the Merit Guideline, this field indicates the dollar amount still available that can be allocated.

Supervisor

Employee's current supervisor

Total % Increase (GWA + Merit + Lump Sum)

By percentage, the combined total General Wage Adjustment (GWA), Base Pay Increase (Merit) and Lump Sum that the employee will receive if the CAO approves

Total % Increase to Base (GWA + Merit)

By percentage, the combined total General Wage Adjustment (GWA) and Base Pay Increase (Merit) that will be applied to the employee's base pay if the CAO approves

Total Award

The combined total, by dollar amount, of any Base Pay and/or Lump Sum allocations.



Ch 4: Job Aid-Allocate and Submit Pay Awards

As indicated previously, Director's have 3 tasks to complete. Two of these occur prior to CAO pay award approval. This chapter is a job aid to complete both tasks. The tasks are:

- ✓ Allocate performance-based pay for eligible MLS employees
- ✓ Submit pay recommendations to the CAO

As the director, you will allocate performance-based pay for all eligible MLS in the department. What follows are the step by step instructions.

For greater ease and convenience, the steps in these instructions are divided into sections:

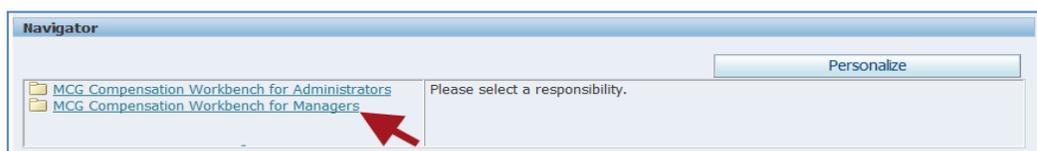
- Navigate to the Compensation Allocation page
- Enter and Save Pay Allocations
- Submit Pay Recommendations **[Deadline: July 01, 2015]**

Step-by-Step Instructions

Navigate to the Compensation Allocation page

Step 1 Log in and navigate to your [Oracle Homepage](#).

Step 2 Click the [MCG Compensation Workbench for Managers](#) link located in the 'Navigator' section.





Step 10

If you wish to allocate the maximum amount allowed for a base pay increase to the employee,

Click the **Gold Icon** in the 'Maximum Dollar Amount Increase Allowed to Base' column, then skip to step 13. Otherwise, proceed to step 11.

Employee Allocations									
Find Name		Go		Export to Excel					
Employee Name	Grade	Fiscal Year Performance Rating	Current Year Base Salary	Projected Next Fiscal Year Base Salary with GWA	Projected Next Fiscal Year Min-Max Salary For Assigned Grade	Projected pay Band Penetration	Merit Guideline	Maximum Dollar Amount Increase Allowed to Base	LEAVE BLANK
Employee 1	M3	Successful	118,845.99	121,222.91	73,706.00-134,718.00	77.88	3.5	4,242.80	

Step 11

Enter the desired **Base-Pay Increase:**

- A. By percentage, use the 'Next Fiscal Year Base Increase %' field
- B. By dollar amount, use the 'Next Fiscal Year Base Increase Amount' field

Merit Guideline	Maximum Dollar Amount Increase Allowed to Base	LEAVE BLANK	Next Fiscal Year Base Increase %	Next Fiscal Year Base Increase Amount	Next Fiscal Year Revised Base Salary	Next Fiscal Year Projected Pay Band Penetration	Lump Sum %	Lump Sum Amount	Remaining Amount Available for Allocation	Total Award
3.5	4,242.80		<input type="text" value="0"/>	<input type="text" value="0.00"/>	121,222.91	77.88	<input type="text" value="0"/>	<input type="text" value="0.00"/>	4,242.80	0.00

IMPORTANT:

- This entry combined with any Lump Sum award may not exceed the Merit Guideline.
- The allowable base pay increase may be limited if the employee is toward or at the top of their pay band.

Step 12

Press the **[Tab]** key on your keyboard to accept your entries.



NOTICE: A number of other columns recalculate in response to your entry.



Step 13 Enter any desired **Lump Sum** award:

- A. By percentage using the 'Lump Sum %' field or
- B. By dollar amount using the 'Lump Sum Amount' field

Merit Guideline	Maximum Dollar Amount Increase Allowed to Base	LEAVE	Next Fiscal Year Base Increase %	Next Fiscal Year Base Increase Amount	Next Fiscal Year Revised Base Salary	Next Fiscal Year Projected Pay Band Penetration	Lump Sum %	Lump Sum Amount	Remaining Amount Available for Allocation	Total Award
3.5	4,242.80	BLANK	0	0.00	121,222.91	77.88	0	0.00	4,242.80	0.00

IMPORTANT: This entry combined with any Base Pay increase may not exceed the Merit Guideline.

Step 14 Press the **[Tab]** key on your keyboard to accept your entries.



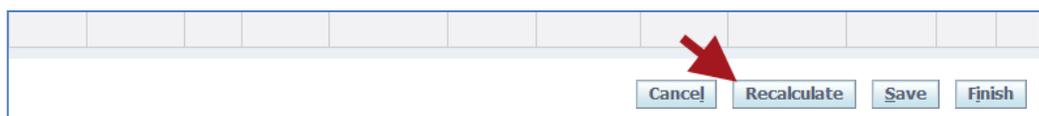
NOTICE: A number of other columns recalculate in response to your entry.

Step 15 **Repeat Steps 7-14** until pay allocations have been entered for all intended employees.

NOTE:

- You may use the 'Save' button at any time.
- You may also click 'Save' and then 'Cancel' to exit and finish later.

Step 16 Click the **Recalculate** button. This will ensure that all calculations and the Compensation Summary section at the top of the page are updated.





Step 20 Click the **Go to Task** icon at the far right for 'Submit Allocations for Approval'.

Task	Access	Last Updated	Status	Go To Task
Checklist:				
Expand All Collapse All				
<input type="checkbox"/> All Tasks				
<input type="checkbox"/> MCG MLS Performance Pay (Jul-14 - Jun-15)				
Allocate Pay Increases		09-Jun-2015	<input checked="" type="checkbox"/>	
Submit Allocations for Approval			<input type="checkbox"/>	
View Employee Statements			<input type="checkbox"/>	

Step 21 Once clicked, the *Submit Allocations for Approval* page opens.

There are three (3) actions buttons on this page:

Return to Home Navigates back to the *Compensation Workbench Home* page.

View Details Opens the *Compensation Allocation* page where you may review your allocations in detail and/or make any changes. Be sure to click the 'Recalculate' and 'Save' buttons if you make any changes, and then click the 'Return' button to return to the *Submit for Approval* page when done.

Submit for Approval Submits your pay recommendations to the CAO.

Step 22 **Review** your entries prior to final submission:

- Scroll down this page to review in summary
- Use the 'View Details' button to review or even edit your allocations. Click the 'Save' button and then the 'Return' button when done.

Step 23 Click the **Submit for Approval** button.

Submit Allocations for Approval	
Submit Status:	Approval Status:
Access:	Next Approver: Timothy Firestone
Due Date: 31-Oct-2015	

Compensation Summary	
Currency: <input type="text" value="USD - US Dollar (Corporate Currency)"/>	<input type="button" value="View Details"/>
MCG MLS Performance Pay	
Eligible Employees	1
Employees Receiving	1
% Receiving	100 %
Total Eligible Salaries	121,222.91 USD
Total Allocated	6,015.61 USD
Total Allocated as % of Total Eligible Salaries	4.96 %
Average Amount per Eligible Employee	6,015.61 USD

Employees Compensated	
	100.00%



Step 24 Click the **Yes** button on the submit confirmation page.

Information
Are you sure you want to submit to the next level?

- This will prevent you from making further updates.
- This will notify your higher manager that you are finished.

Step 25 Select **Yes or No** as to whether or not you want to send an Oracle worklist notification to the CAO alerting of your submission. A notification is optional. It does not impact the transfer of your submission.

Comments

Do you wish to notify your approver?

Yes, notify my approver
Include Comments

No, do not notify my approver

Step 26 **OPTIONAL:** Complete the survey that displays below the confirmation message.

Confirmation

Your updates have been submitted for Approval.
You may return to your review page at any time to monitor the approvals progress. If you have submitted in error, or wish to make further changes, return to this process and perform a 'Recall Submission'. Once your manager has approved your work, you may no longer recall.

Please Rate Compensation Workbench

Excellent
 Good
 Poor

Comments

Step 27 Your pay recommendations have now been submitted. If you selected 'Yes' in step 24, the CAO has received an Oracle notification confirming your submission.

End of Procedure



Ch 5: Job Aid - Employee Statements

Following CAO approval of pay awards, Directors will want to communicate this information to the employee. To facilitate this intention, CWB contains employee statements that can be exported. Included in this chapter:

- ✓ Two methods for exporting Employee Statements
 - ✓ Step-by-Step instructions on how to perform each method.
-

Methods for Exporting Employee Statements

There are two (2) methods for exporting statements:

- **Export employee statements as separate files:** In this method, each employee statement is selected and exported individually. The result is one statement per each pdf document. Once exported each document can be saved, printed, or emailed as desired. The advantage to this method is its flexibility, especially as relates to distribution. Of course, one disadvantage is the initial time investment if there are many statements to export.
- **Export multiple employee statements as one file:** In this method, all statements you want to export are selected at once and then exported into one, consolidated pdf document. The document is formatted such that each page is a separate statement. The advantage of this method is the initial time savings and fewer files to manage. A disadvantage is in the additional steps required should you ever want to retrieve a specific statement from within the consolidated file.

Which option, or even both, that you elect to use really depends on a number of factors, including the number of employee statements you have, how you ultimately want to distribute them to the employees and just plain personal preference.

Once you've decided which method you prefer, the step-by-step instructions are below.

*****IMPORTANT:** Communicate awards to employees after approval but no later than **Aug 5** ***



Step-by-Step Instructions

Export Employee Statements as Individual Documents

IMPORTANT: It is your responsibility to protect the confidentiality of employee statements.

Step 1 Log in and navigate to your [Oracle Homepage](#).

Step 2 Click the [MCG Compensation Workbench for Managers](#) link located in the 'Navigator' section.



Step 3 Click the [Compensation Workbench](#) link that now displays at right.



Once clicked, the *Compensation Workbench Home* page opens.

Step 4 Locate [MCG MLS Performance Pay \(Jun-14 – Jun-15\)](#) in the Task section.

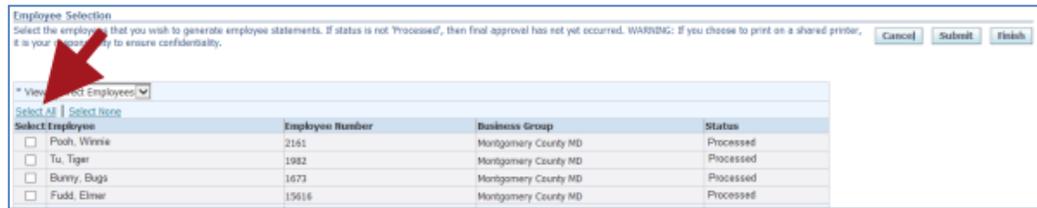
Step 5 Click the [Go to Task](#) icon to the far right of the sub-task 'View Employee Statements'.

Task	Access	Last Updated	Status	Go To Task
☐ MCG MLS Performance Pay (Jul-14 - Jun-15)				
Allocate Pay Increases	Read Only	10-Jun-2015	✓	
Submit Allocations for Approval	Read Only	10-Jun-2015	✓	
View Employee Statements	Read Only			

Once clicked, the Employee Selection page opens.



Step 6 Click the **Select** checkbox to the left of the desired employee name.



Step 7 Click the **Submit** button.



Once clicked, a file output option bar will display at the bottom of your screen.

Step 8 Select an **Option**:

- a. **Open** Opens the statement in pdf format where it can be viewed, printed or saved.
- b. **Save** Immediately saves (but does not display) the statement as a pdf file to your hard drive with a default filename to a default location. Once saved, it can be managed like any other pdf document –open, view, print, rename, move, etc.
- c. **Save As** Selected from the 'Save' drop down list, this option allows you to immediately rename the file and save in pdf format to whatever location you choose. It can then be managed like any other pdf document.

Step 9 **Repeat Steps 6-8** for each additional statement you wish to export.

Step 10 You have now exported employee statements as individual documents.

End of Procedure



Export Multiple Employee Statements into One Document

IMPORTANT: It is your responsibility to protect the confidentiality of employee statements.

Step 1 Log in and navigate to your **Oracle Homepage**.

Step 2 Click the **MCG Compensation Workbench for Managers** link located in the 'Navigator' section.



Step 3 Click the **Compensation Workbench** link that now displays at right.



Once clicked, the *Compensation Workbench Home* page opens.

Step 4 Locate **MCG MLS Performance Pay (Jun-14 – Jun-15)** in the Task section.

Step 5 Click the **Go to Task** icon to the far right of the sub-task 'View Employee Statements'.

