



CWB

Oracle Compensation Workbench *for Department Directors*



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Montgomery County Government

CWB Director's Guide

May 23, 2016

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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
- ✓ OHR Merit Guidelines

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:

- 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.



Ch 2: 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 CWB *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 <i>and</i> those that are not eligible will both display on the <i>Compensation Allocation</i> 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.



Next Fiscal Year Base Increase Amount

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.

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 3: Job Aid-Allocate and Submit Pay Awards

As indicated previously, Directors have 3 tasks to complete. Two of these occur prior to CAO pay award approval. This chapter contains 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:

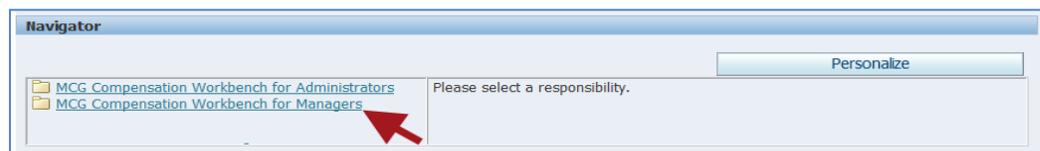
- Navigate to the Compensation Allocation page
- Enter and Save Pay Allocations
- Submit Pay Recommendations

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.





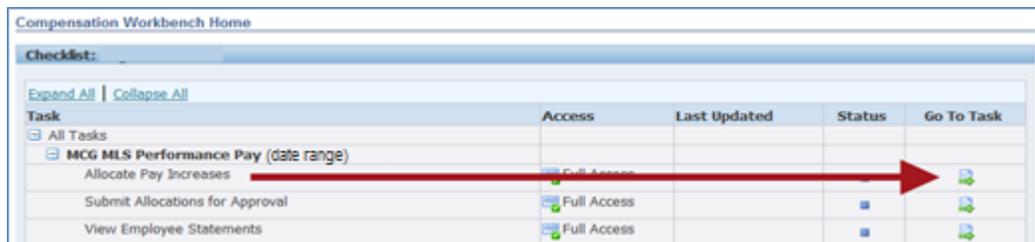
Step 3 Click the **Compensation Workbench** link that now displays at right.



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

Step 4 Locate **MCG MLS Performance Pay** for the current date range in the Task section.

Step 5 Click the **Go to Task** icon to the far right of the sub-task 'Allocate Pay Increases'.



Step 6 The **Compensation Allocations** page opens where all MLS employees in the department display.

There are four (4) action buttons on this page:

Cancel Cancel any changes and/or return to the *Compensation Workbench Home* page.

Cancel **does not** undo any changes that have been saved.

Recalculate Recalculates all changes and updates the 'Compensation Summary – Team' section.

The 'Recalculate' button **does not** save. Since it doesn't save changes, it can be used to test "what if" scenarios.

Save Saves the current work and remains on the page.



Finish Saves the current work, updates the Compensation Summary – Team section and exits the page.

Enter and Save Pay Allocations

Step 7 Locate the desired **Employee** in the 'Employee Name' column at the far left.

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

NOTE: If you have a lot of employees, you may use the 'Find Name' field and 'Go' button to search.

Step 8 Locate the **Merit Guideline** column for the employee. This field specifies the maximum combined total of base pay and lump sum that can be allocated to this employee.

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

NOTE: An attempt to save an amount that exceeds the guideline will cause an error to display.



Step 9 Locate the **Maximum Dollar Amount Increase Allowed to Base** field for this employee.

This column displays the maximum amount that can be awarded for a base pay increase.

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	Fiscal Year Grade	Performance Rating	Current Year Base Salary	Projected Next Fiscal Year Base Salary with GWA Assigned	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		0	0.00	121,222.91	77.88	0	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 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		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.

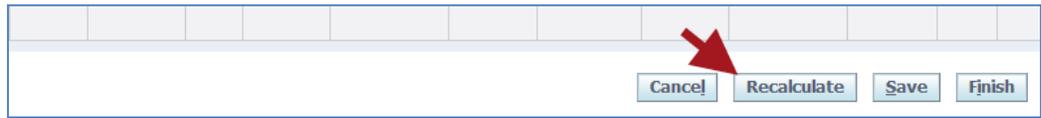
Step 15 **Repeat Steps 7-14** until pay allocations have been entered for all intended employees.

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.



IMPORTANT: Re-click the 'Recalculate' button whenever changes are made.

WARNING: The 'Recalculate' button **Does Not** save your work.

Step 17 Click the **Finish** button to complete your pay allocations and return to the *Compensation Workbench Home* page.

Merit Guideline	Maximum Dollar Amount Allowed to Increase 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 (GW)	In
3.5	4,242.80		2.5	3,030.57	124,253.48	82.85	0.5	606.11	606.12	3,636.68	

Home Logout Preferences Help

The 'Finish' button –

- Saves the current work,
- Updates the 'Compensation Summary – Team' section,
- Closes the page

Step 18 You've returned to the *Compensation Workbench Home* page.

The task to allocate pay increases is now complete. Now, on to the next task.



Submit Pay Recommendations

Step 19 Locate **Submit Allocations for Approval** in the Task list under 'MCG MLS Performance Pay (date range)'.

Task	Access	Last Updated	Status	Go To Task
All Tasks				
MCG MLS Performance Pay (date range)				
Allocate Pay Increases	Full Access	09-Jun-2015	✓	
Submit Allocations for Approval	Full Access		■	
View Employee Statements	Full Access		■	

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
All Tasks				
MCG MLS Performance Pay (date range)				
Allocate Pay Increases	Full Access	09-Jun-2015	✓	
Submit Allocations for Approval	Full Access		■	
View Employee Statements	Full Access		■	

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.

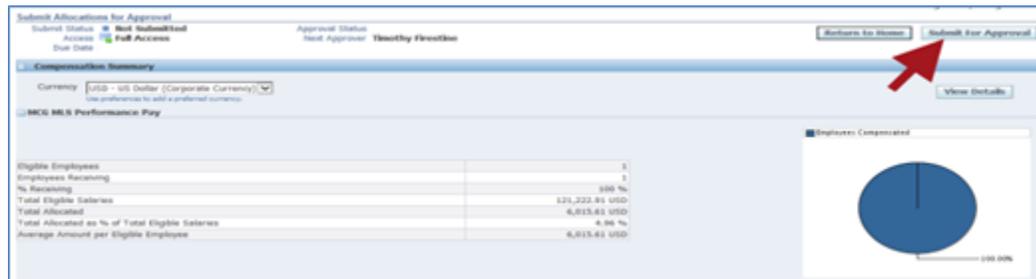
Submit for Approval Submits your pay recommendations to the CAO.



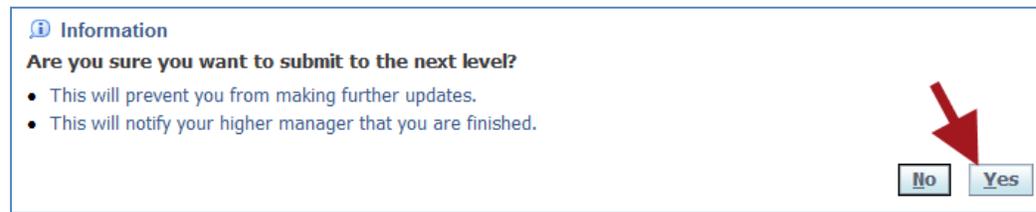
Step 22 **Review** your entries prior to final submission:

- 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.

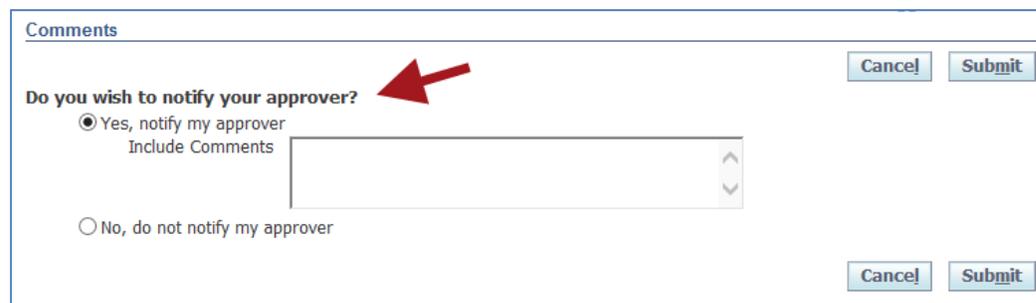
Step 23 Click the **Submit for Approval** button.



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



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.





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

OK

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.



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 file. Once exported each file 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 file. The file is formatted such that each page is a separate employee statement. The advantage of this method is the initial time savings and fewer files to manage. The disadvantages are in the additional steps required to distribute the pages as individual statements and in the future should you ever wish 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.



Export Multiple Employee Statements as One File

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.



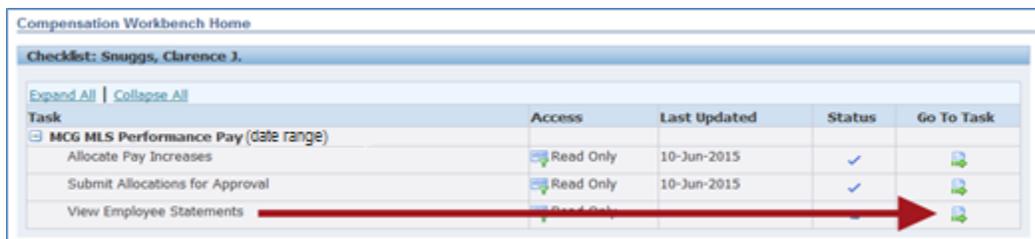
Step 3 Click the **Compensation Workbench** link that now displays at right.



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

Step 4 Locate **MCG MLS Performance Pay** in the Task section.

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



Once clicked, the *Employee Selection* page opens.



Step 6 Click the **Select** checkbox to the left of each desired employee name. Alternatively, you can select all employees at once by clicking the 'Select All' link.



Step 7 Click the **Submit** button.



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 You have now exported multiple employee statements as one file where each page is a separate statement.

End of Procedure