





Compensation Workbench Implementation at University Hospitals

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OAUG Collaborate '08







Agenda

- About University Hospitals and Solbourne
- UH Oracle Environment
- Key Drivers for CWB
- Project Scope and Team
- Plans and Options
- Plan Design and Details
- Tips and Gotchas











About University Hospitals

- 2nd largest employer in Northeast Ohio
- Nine entities (including Community Hospitals,
- Home Health and Physician Practices)
- 14,000+ Employees
- 1,000+ Supervisor/Managers/Directors
- University Hospitals Rainbow Babies & Children's Hospitals has ranked best in the Midwest and #5 in the country in US News & World Report's









About Solbourne

- National Consulting Firm Headquartered in Boulder, CO
- Over 130 Employees
- Oracle Family of Applications Focused Since 1994
 - Fusion Middleware Technology
 - E-Business Suite
 - PeopleSoft Enterprise
 - Education and Change Management
- Oracle Certified Advantage Partner Highest Level
- Over 260 Oracle Applications Projects Commercial and Public Sector











UH Oracle Environment

- Application version 11.5.10
- HRMS Family Pack K RUP 2
- Using HR, Payroll, OAB, Self-Service HR, iRecruitment, OLM
- 16 additional Oracle products related to Financials and Supply Chain suite of applications









Key Drivers for CWB

- The previous compensation process was manual, spreadsheet based
- Six compensation plans across a population of 14,000+ employees, and 1,000+ managers required thousands of spreadsheets
- Need for an automated process to save thousands of man hours spent on making the manual process work
- Key emphasis on "Pay for Performance" culture









Project Scope

- Big bang approach for implementation of seven Compensation Workbench plans – Three plans for Salary Increase, and Four plans for Bonuses
- Complex Eligibility and Rate Calculations for most of the plans
- Performance Ratings given in CWB on the same worksheet as the increase









Project Scope

- Use of Dynamic Columns in most of the plans for calculations, conditions etc.
- Worksheets heavily personalized by plan
- Supervisor Hierarchy for approvals
- Letter configuration for most plans









Project Team

- UH Project Sponsor
- Project Manager from UH
- UH Compensation and Benefits Manager
- UH Compensation Analysts Four (4)
- UH Applications Specialist
- Solbourne Project Manager/CWB Functional Consultant
- Solbourne Technical Consultant









Salary Plans

- Pay for Performance for Non-management employees
- Management Pay for Performance
- Proficiency Skills Program (PSP)









Bonus Plans

- Special Performance Award (SPA)
- Retention Bonus
- Per Visit Productivity Bonus









Options

Management Pay for Performance

- Options
 - Merit
 - Market Adjustment
 - Management Incentive Plan
- Pay for Performance
- Options
 - Merit
 - Market Adjustment









Plan Design

Pay for Performance

- Annual salary increase plan for Management employees
- Comprises components like Merit, and Market Adjustment
- Management PFP plan also comprises a stand alone bonus component for MIP
- Budgets used
- % of Eligible Salary used for merit and market adjustment computations









Design Discussions

- Two plans for PFP or one?
- A separate plan for Management Incentive plan, or an option within Management Pay for Performance plan?
- Lump Sum Option for PFP?
- Hourly Budgets or Annual Budgets?
- What Performance Rating Type to use?
- How many tasks to use in CWB?
- What columns to display in worksheet?

Solbourne







Design Discussions

- What capabilities to give to the managers?
- Validations, conditions, and calculations in CWB worksheets
- Use Views capability or not?
- Column Titles and Sequence in CWB worksheets









Eligibility

- Pay for Performance
 - Exclude employees from certain GREs
 - Exclude certain jobs
 - Exclude certain position titles (Position Title is one of the segments of the Position KFF structure at UH)
 - Exclude employees eligible for PSP program (PSP eligibility is captured in an SIT at the employee level)
 - Exclude Bargaining Unit employees
 - Exclude certain Employment Categories
 - Exclude employees based on seniority date requirement (stored in Person level DFF attribute)







Eligibility Profiles

- Standard ELPROs for
 - Exclude employees from certain GREs
 - Exclude certain jobs
 - Exclude Bargaining Unit employees
 - Exclude certain Employment Categories
- Creative solutions for ELPRO rules for
 - Exclude certain position titles
 - Exclude PSP eligible employees (from SIT)
 - Exclude employees based on seniority date (from DFF)









Standard ELPRO

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Creative solution for complex requirements

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MIP_ELIGIBILITY_DATE	Eligibility Date for MIP	Date	01-JUL-2007	01-JAN-2
PFP_SENIORITY_DATE	Seniority Date for PFP	Date	30-SEP-2007	01-JAN-2
PRN_HOURS_END_DATI		Date	22-DEC-2007	01-JAN-2
PRN_HOURS_START_D/		Date	24-DEC-2006	01-JAN-2
RETENTION_SENIORITY		Date	28-FEB-2006	01-JAN-2
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ELPRO Rule

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Plan Definition

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CWB Tasks

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Hint: Use Self Service Personalization to further define task contents, including which columns are displayed.









Options in Plan

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Plan Enrollment Requirements

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	8	Default Access to Tasks Full Access
		Freeze Date (Omit for Most Recent Data)
		Assignment Changes Become Effective 30-MAR-2008
		Salary Change Reason Pay for Performance
		Enrollment Rules









Standard Rates

Activity Types used by UH

- CWB Distribution Budget
- CWB Worksheet Budget
- CWB Eligible Salary
- CWB Worksheet Amount







Standard Rates (01-JAN-2007)	(1,2,2,2,2,2,2,2,2,2,2,2,2,2,2,2,2,2,2,2
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Level	Option in Plan
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Activity Type	CWB Distribution Budget
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Usage	Standard Contribution/Distribution
UOM	Element Determination Rule
Element	□ Element and Input Value Required
Input Value	Extra Input Rule
Parent /Child	Uses Variable Rate
Assignment to Use	Subject to Imputed Income
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Increment	.00000001	Rounding Rule	
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Set Budgets	👼 Full Access	14-Feb-2008	۲	
Rate Employees and Allocate Compensation	👼 Full Access			
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Rate Employees and Allocate Compensation	💯 Full Access			
Approve Ratings and Allocation	💯 Full Access			
Review and Submit	💯 Full Access			









Plan Design

Proficiency Skills Program

- Salary plan for nurses
- Performance Rating used to capture "level" for the nurses
- Eligibility based on Person level SIT segment value
- Salary rate is a factor of several factors, including
 - GRE
 - Position
 - Performance Rating
 - Salary Basis
 - Shift









Design Discussions

- How to factor in a run time performance rating into salary rate calculation?
- Need to replace the current salary with the new worksheet amount as opposed to adding it
- Budgets or no budgets?
- Are managers allowed to make changes?
- Are approvals needed?







Compensation Workbench Home

Personalize "Checklist"				
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Rate Employees and Allocate Compensation	💯 Full Access			
Approve Ratings and Allocation	💯 Full Access			
Review and Submit	💯 Full Access			







Plan Design

Retention Bonus

- 2.5% of eligible earnings paid during a certain time frame
- Eligibility tracked on Position level DFF attribute
- Primarily based on seniority date
- Employees with Performance score of "C", or with Corrective Actions excluded from eligibility
- Semi-annual plan











Compensation Workbench Home

Checklist: Zenty, Thomas F III				
Personalize "Checklist"				
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Rate Employees and Allocate Compensation	💯 Full Access			
Approve Ratings and Allocation	颇 Full Access			
Review and Submit	💯 Full Access			







Plan Design

Special Performance Award (SPA)

- Majority of the workforce is eligible
- Seniority Date, GRE, Job, Position, Hours worked (for PRN positions) play a role in eligibility
- Employees with Corrective Actions are excluded
- Annual Bonus
- Bonus amount based on seniority date







Compensation Workbench Home

Personalize "Checklist"				
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Rate Employees and Allocate Compensation	💯 Full Access			11
Approve Ratings and Allocation	💯 Full Access			11
Review and Submit	💯 Full Access			









Plan Design

Per Visit Productivity Bonus

- Annual Bonus for Per-Visit nurses
- Eligibility based on assignment category
- Flat amount Bonus based on Performance
- Performance Rating given at the same time as bonus allocation
- "Simplest" of all our seven plans! We mean, relatively speaking!









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SPA (Jan-07 - Dec-07)				
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Generate Employee Letter	💯 Full Access			
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Set Budgets	💯 Full Access	14-Feb-2008	۲	
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Approve Ratings and Allocation	💯 Full Access			
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Set Budgets	💯 Full Access	14-Feb-2008	۲	
Rate Employees and Allocate Compensation	💯 Full Access			
Approve Ratings and Allocation	💯 Full Access			
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Per Visit Productivity Bonus (Jan-07 - Dec-07)				
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Approve Ratings and Bonus Allocation	💯 Full Access			
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Project Highlights

- User hooks and dynamic columns used extensively and with a lot of success
- Great success with plan rollouts
- Effective training model
- Super users and end users very comfortable with the system
- Great feedback received from managers (Manager Feedback report utilized for measuring feedback)
- Efficiency in compensation process for everyone









- Use Flat Amount calculation method in Standard Rates WB, DB, WA activity types even while storing Budgets as Percentage of Eligible Salary
- Note "Enrollment or Availability Period" is different from "Self-Service Update Period"
- Personalizations in worksheets can be done by plans, but any other personalizations on the CWB main page cannot be done by plans (but at responsibility, function or site level)









- Recommended Amount activity type works really well in CWB worksheets, and provides icons for managers to use for min, max and target amounts
- Utilize Information and Links section for URLs applicable to your business needs
- Custom messages can be configured for Mass Notification functionality for target population – Use Advanced Benefits application for this
- Pay attention to the sequence numbers used for mathematical calculations and conditions in dynamic columns









- Prepare a consolidated spreadsheet with lists of all the columns used for different CWB plans, and their labels
- Be aware of the number and types of dynamic columns used
- Use Preferences for date tracking functionality in CWB
- Use Forms Toolbar Text Form functionality in .rtf template to format the amounts on Employee Statements to have separators and decimal values (See Metalink Note 463041.1 for details)









- Four types of budget distribution options available Automatic, Manager Roll Down, Employee Rollup, Administrative Modeling
- Consider combining related CWB tasks to reduce the number of tasks
- Consider using Views to avoid horizontal scrolling in CWB spreadsheet
- Employee Administration link can be utilized for backing out and reprocessing CWB plans for specific employees









Metalink Notes

- 399879.1 CWB Overview Viewlets
- 314378.1 Patch List
- 301163.1, 301160.1, 302084.1 Sample Setup
- 311702.1 Employee Statement Setup
- 294465.1 -Various other links









Questions & Answers











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