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| --- | --- | --- | --- |
| **Compensation FAQ**  **Company:**  **Business Process Owner/Admin** | START DATE | DUE DATE | COMPLETED |
| If new Admin, how long have you been in your role and what do your responsibilities include? |  |  |  |
| Are you engaged with other Business Process Owners? If so, should they be a part of the compensation cycle discussions? |  |  |  |
| Describe the business entities engaged in the compensation cycle  Director -  Manager -  Planner- |  |  |  |
| What date are you launching? |  |  |  |
| How many templates are you using this year? |  |  |  |
| Will you launch in multiple languages? |  |  |  |
| What is your communication before and during compensation cycle? |  |  |  |
| **Compensation CYCLE PLANNING CHECKLIST** | START DATE | DUE DATE | COMPLETED |
| **90 Days from Launch** |  |  |  |
| **Customer begins internal cycle planning discussions** |  |  |  |
| **Business Changes** |  |  |  |
| Are you launching to the same group as last year or is it changing this year. Will managers or planners be responsible for the compensation worksheet? |  |  |  |
| How will you handle inactive users? Will they be a part of the compensation cycle? |  |  |  |
| **Compensation Statements** |  |  |  |
| Do you anticipate changes to the compensation statement? |  |  |  |
| Successstore for Compensation Statements? |  |  |  |
| Custom Compensation Statement? |  |  |  |
| **Performance** |  |  |  |
| Are performance forms a part of your compensation cycle? If so, are there any changes to the PM form that will impact the compensation worksheet? |  |  |  |
| Template Updates/Changes |  |  |  |
| Route Maps |  |  |  |
| Rating Scales |  |  |  |
| **60 Days PRIOR TO FORM LAUNCH – on or Before (TEST Instance)** |  |  |  |
| **Customer & CSM holds strategic cycle planning discussion to review changes for the upcoming cycle.** CSM will do further research to identify potential impacts created by changes, mitigate risks, and provide additional options to meet the customer's needs  **Customer & CSM will determine whether changes can be accomplished in Admin Tools with guidance by CSA or if TSE is needed.** At this time it should already be determined that PS is NOT needed. ***Note there are some items that will need TSE/XML configurations:*** *i.e. templates must reference new Currency and Pay Matrix Tables and new custom eligibility keys.* |  |  |  |
| **Customer documents configuration changes for Compensation Template on CCOR**  *Please note TSE configurations for Compensation Template changes will take*  *around 6 weeks for completion for discovery, configurations, and testing. Configurations for Compensation Statements cannot begin until Compensation Templates are complete.* ***Premium Reports Team configurations for Compensation Statements can take around 3 weeks for minimal changes)*** |  |  |  |
| \*Ensure CCOR includes: Co ID, Admin Contact, Module, Template Name, List of Changes, Currency & Pay Matrix Tables, Custom Eligibility Keys, other changes made via Admin Tools, Test Users, Desired Completion Date.  **Customer opens a case for Compensation Template & Statement Changes**  *Customer will attach CCOR, Template XMLs, Summary of Changes, and availability for Discovery session.* |  |  |  |
| **Customer to create a NEW/Copy of Existing Compensation Plan Template (If working with TSE for compensation changes, they will copy the desired Template and create a new copy). *If TSE is not needed for compensation cycle changes, customer should START HERE.***  *It is best practice NOT to update the plan template used for previously launched forms. Creating a new template allows use of the Executive Review, Ad hoc and Aggregate Export, reflecting only data from the current cycle’s forms and can reference unique currency conversion table/pay matrix/lookup tables that were created.* |  |  |  |
| **Customer to complete NEW Currency Conversion Table in Admin Tools**  *It is a best practice NOT to update the table referenced in previously launched forms. You can import last year’s table and then update the rates in Admin tools when you are ready prior to your launch.* |  |  |  |
| **Customer to complete a NEW Pay Matrix**  *It is a best practice NOT to update the table referenced in previously launched forms. You can import last year’s table and then import a new file in Admin tools when you are ready prior to your launch.* |  |  |  |
| **Customer to complete NEW Look Up Tables** (If changes are needed)  *It is best practice NOT to update lookup tables that were referenced in forms that have been launched for a prior cycle.* *If you anticipate any changes to the input or output values, it is best practice to create new tables which can be referenced in your new templates* |  |  |  |
| **Customer to review Custom Eligibility Keys and make necessary changes**  *(Only necessary if Customer uses Custom Eligibility Keys)* |  |  |  |
| **Import File** |  |  |  |
| Customer has current compensation Cycle data ready for import |  |  |  |
| Column Designer: Columns are updated to reflect new dates/labels needed on the import file. |  |  |  |
| **Performance Forms** |  |  |  |
| **Performance Template is updated to reflect current cycle** |  |  |  |
| Customer documents errors/corrections and posts updates to the ticket for TSE/or Support Delivery Team |  |  |  |
|  |  |  |  |
| **30 Days PRIOR TO FORM LAUNCH (Production) on or Before** |  |  |  |
| **TSE loads has updated form into the Production instance – if engaged. If not, customer completes the following.** |  |  |  |
| **Customer Loads Compensation Specific Dependencies in Production** |  |  |  |
| Import file |  |  |  |
| Pay Matrix and Currency Tables |  |  |  |
| Lookup Tables (if configured) |  |  |  |
| Configure Rating Sources (Link PM Form to Compensation Template) |  |  |  |
| **Configure Eligibility Rules for template after copying over from Production** |  |  |  |
| **Double check guidelines and budgets to ensure that everything has migrated correctly** |  |  |  |
| **Email Notifications: Set up email notifications in production** |  |  |  |
| **Customer Thoroughly Tests Form Changes** (CSM can provide a testing checklist) |  |  |  |
| Test Form, Route Map, Rating Scale, PM form Association, Notifications, Document Transfer Settings, Dashboards/Reports, Notifications, etc.  Verify form calculations |  |  |  |
| Customer documents errors/corrections and posts updates to the ticket for TSE/or Support Delivery Team |  |  |  |
| **1 WEEKS PRIOR TO FORM LAUNCH** |  |  |  |
| **Customer validates all user data in production** |  |  |  |
| * Validate that all employee data is up to date and hierarchy is correct without breaks |  |  |  |
| **Customer develops plan for form launch** |  |  |  |
| Customer to test form launch in production to Test users and validate all components of compensation process are behaving as expected.  Customer sets up data filters for Mass Launch |  |  |  |