



What is BalanceAAP?

BalanceAAP is a Web-based application for the preparation of Affirmative Action plans (AAPs) in accordance with Office of Federal Contractor Programs (OFFCP) technical guidelines.

Step-by-step modules allow the user to:

- Create one plan or set up the structure for a set of plans
- Import and check employee data
- Create an organizational profile
- Prepare the job group analysis
- Use availability-versus-employment analyses to uncover where protected-class members are underutilized and set placement goals as necessary
- Monitor progress towards goal attainment, based on goals set in the previous plan year
- Develop utilization metrics for individuals with disabilities (IWDs) and hiring metrics for Veterans
- Bring in data on outreach efforts from REACH for inclusion in narratives
- Generate customized narratives with embedded key data and reports
- Output data and all AAP-required reports* in popular formats
- Complete EEO-1 and VETS-4212 reporting
- Run adverse impact analyses (and other reports* for audit review) to check for potential discrimination in personnel actions
- Publish plans to colleagues, based on their locations and/or roles in the process
- For multiple locations, develop Dashboard metrics

On-line Access

- Compatible with Chrome, Firefox, Edge, and Internet Explorer
- Collaborate with users from any location, at any time

Product Support

Technical support by telephone, email, and Berkshire's Community Portal for software issues is included as long as subscription is maintained. Please refer to contact information on the reverse.

- Self-Help and documentation Library available within software

Security

- 256-bit https on-line platform via Transport Layer Security (requires a current browser)
- Data are encrypted at rest and in transit.
- Password requirements include minimum length, complexity, version control, and expiration.
- Publish reports, based on system profiles and user permissions
- 24/7-monitored data center with physical and network security is SSAE-16-certified and meets the PCI Data Security Standard
- System and plan-level logging of user activity available to administrators
- Retain AAPs for the regulatory period, and archive legacy AAPs for export

*For a full list of AAP-required and supporting reports, please refer to the accompanying sheet.



Task Area	Tools
<p>Home page / Universal Tools</p> <p><i>Special Feature:</i> Collapsible side navigation bar for more work space</p>	<ul style="list-style-type: none"> • Navigate to other balanceWORKS software (e.g., REACH, for Good Faith Efforts tracking) • Refer to Help documentation, user guides, Federal resources, and video tutorials (topics, as available) • Request support from a Berkshire representative • Access user account information
<p>Plan List</p>	<ul style="list-style-type: none"> • Store and open saved annual and update AAPs • For users with multiple plans, create filters to find the AAPs you need
<p>Create Plan</p> <p><i>Special Feature:</i> Create Plan wizard</p>	<ul style="list-style-type: none"> • Set personnel action date range • Create Master plan to control common elements across multiple plans • Import plan information from another balanceAAP plan • Choose census data source • Select audit status for use as a report filter
<p>Structure Plan Settings</p>	<ul style="list-style-type: none"> • Review Create Plan settings • For multiple plans, establish plan codes to create sub plans • Customize protected classes for reporting results • Review advanced calculation settings • Set up optional drill-downs (within plan), roll-ups (across plans), and plan groups for analysis and reporting • Map locations for REACH Good Faith Efforts integration • If necessary for product support, allow Berkshire representative to view plan • Use the default archive setting or extend the access period
<p>Import and Review Data</p> <p><i>Special Features:</i> Auto Import wizard Automatic hold on invalid data Auto census coding Roster annotation helper Disability/Veteran status reconciliation Salary midpoint calculator</p>	<ul style="list-style-type: none"> • Import Excel, Access, and delineated text files • For multiple plans, use one data set for all plans • Map incoming data to system fields • Store Data tables in balanceAAP, leaving originals intact • Choose from overwrite and append options for subsequent imports • Import optional drill-down or roll-up fields • Assign supervisors, using employee ID • Sequence grades • Assign "Reports to" locations for multiple plans



Task Area	Tools
<p>Reconcile Applicant and New Hire Data</p> <p><i>Special Features:</i> “Swap Hires” with applicants Update Job Code by Requisition</p>	<ul style="list-style-type: none"> • Generate a workbook to review inconsistencies • Re-import the generated workbook once corrections are made • Scrub data automatically to remove applicants who applied to a job Requisition that was not filled • Update mismatched or blank applicant data, using batch operations and/or record-level tools
<p>Use Optional Advanced Data Tools</p>	<ul style="list-style-type: none"> • Export data from balanceAAP (e.g., OFCCP compensation export, Reports user list) • Define additional personnel actions and custom user fields • Query and perform batch operations to view, update, or delete data; standardize codes for case
<p>Review/Resolve Data Errors</p> <p><i>Special Feature:</i> Automatic return of corrected records to Data tables</p>	<ul style="list-style-type: none"> • Make record-level edits on Errors tables • Review summary and detail reporting for a clear picture of errors • Globally correct coding errors of the same type • Delete unused Reference codes
<p>Review/Resolve File Inconsistencies</p> <p><i>Special Feature:</i> Auto prompt to run check</p>	<ul style="list-style-type: none"> • Check for consistency across records for 11 types of potential issues, with user-selected parameters • Review inconsistent records side-by-side, and make record-level edits • Review summary and detail reporting for a clear picture of issues • Run batch operations for file consistency issues
<p>Establish External Availability (Factor 1):</p> <p>Recruitment Areas</p> <p><i>Special Feature:</i> Recruitment Area Wizard (step-by-step intuitive menus)</p> <p>Census Coding</p>	<ul style="list-style-type: none"> • Choose from census place, core-based statistical area, county, state, or advanced options (e.g., education level) • Build and assign recruitment areas by job group or plan • View composition report, availability worksheet to support recruitment area development • By means of the wizard, validate and use employee or applicant Zip codes to build recruitment areas • View and edit job title/code-census code matches (whether brought in via data import or populated through auto census coding) • Expand entry to view Standard Occupation Code (SOC) definition and demographic statistics from the U.S. Census • Filter display by job group, other variables, revision version, and whether code is in use • Search for census codes with multi-level tools • Export census code assignments to Excel



Software Tools

Task Area	Tools
Define Internal Availability (Factor 2)	<ul style="list-style-type: none"> Identify feeder (source) jobs by job title or job group Read feeders from promotion (and transfer) data Import feeders from another balanceAAP plan If multiple source jobs feed a target job, weight those jobs Verify source jobs are junior to target promotion jobs; remove downward movement Review calculations reporting to support feeder development
Calculate Availability versus Employment <i>Special Features:</i> Apply Quick Weights (as calculated by the system) Factor 2 check	<ul style="list-style-type: none"> Assign factor weights Perform “what-if” analysis with Utilization rules; review best Utilization rule report Import weights from another balanceAAP plan Review (and edit) statistical settings View results by raw/weighted statistics: underutilization, statistical value, and shortfall Show statistics in whole person or percent
Select History Source <i>Special Feature:</i> Start Point analysis (if first plan)	<ul style="list-style-type: none"> In the current plan, establish the historical starting point for reporting on goal attainment
Develop IWD/Veteran Metrics <i>Special Feature:</i> Displays current OFCCP benchmarks	<ul style="list-style-type: none"> Select data source for hiring overview analysis Import hiring overview settings from another balanceAAP plan Calculate the number of jobs filled Set benchmarks, and perform analysis for Individuals with Disabilities and Veterans
Create Narratives <i>Special Features:</i> Header/footer tools, including page numbering Default merge tags	<ul style="list-style-type: none"> Customize Women & Minorities, IWDs, and Protected Veterans narratives, including for company branding, policies, and signers Save templates for future use Import narratives from another balanceAAP plan Turn on integration to populate outreach data into the narratives from REACH
Publish Plan	<ul style="list-style-type: none"> Manage user access and profile groups to control who views plan results and reports (e.g., by location, by role) Turn on access to facilitate report dissemination, based on profile groups
Output EEO-1/VETS Reports	<ul style="list-style-type: none"> If plan/filing dates are harmonized, use one data set for AAP and EEO-1/VETS reporting Pull in data from AAP data set for demographics, minimum/maximum number of employees, and establishment codes Create the electronic filings

Please see the accompanying *Reports & Dashboard specifications overview* for more information on report settings, generating reports, and dissemination of AAP results. The companion list of *AAP Primary & Supporting Reports* outlines the available required, communication, and supplemental reports.