



### 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 BALANCEhub REACH
- 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 to check for potential discrimination in personnel actions
- Prepare reports\* for audit review

#### 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, data are encrypted in transit (For best safety, use a current browser.)
- Password requirements include minimum length, complexity, version control, and expiration
- Publish reports, based on system roles and permissions, via the BALANCEhub portal
- 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

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



Task Area	Tools
<p><b>Create Plan</b></p> <p><i>Special Feature:</i> Create Plan wizard</p>	<p>Set personnel action date range</p> <p>Create Master plan to control common elements across multiple plans</p> <p>Import plan information from another BALANCEaap plan</p> <p>Choose census data source</p> <p>Select audit status for use as BALANCEhub report filter</p>
<p><b>Structure Plan Information</b></p>	<p>Review Create Plan settings</p> <p>For multiple plans, establish plan codes to create sub plans</p> <p>Customize protected classes for reporting results</p> <p>Review advanced calculation settings</p> <p>Set up optional drill-downs (within plan), roll-ups (across plans), and plan groups for analysis and reporting</p> <p>Map locations for BALANCEhub REACH Good Faith Efforts integration</p> <p>If necessary for product support, allow Berkshire representative to view plan</p> <p>Use the default archive setting or extend the access period</p>
<p><b>Import and Review Data</b></p> <p><i>Special Features:</i> Auto Import wizard Automatic placement of invalid data in Errors Auto census coding (cross-walk between census data sources) Roster annotation helper “Apps to Hires” reconciliation Disability/Veteran status reconciliation Salary midpoint calculator</p>	<p>Import Excel, Access, and delineated text files</p> <p>For multiple plans, use one data set for all plans</p> <p>Map incoming data to system fields</p> <p>Store Data tables in BALANCEaap, leaving originals intact</p> <p>Choose from overwrite and append options for subsequent imports</p> <p>Import optional drill-down or roll-up fields</p> <p>Perform advanced operations (export, perform batch operations, manage user fields)</p> <p>Assign supervisors, using employee ID</p> <p>Sequence grades</p> <p>Combine small job groups, if necessary</p> <p>Assign “Reports to” locations for multiple plans</p>
<p><b>Review/Resolve Data Errors</b></p> <p><i>Special Feature:</i> Automatic return of corrected records to Data tables</p>	<p>Make record-level edits on Errors tables</p> <p>Review summary and detail reporting for a clear picture of errors</p> <p>Globally correct coding errors of the same type</p> <p>Delete unused Reference codes</p>
<p><b>Review/Resolve File Inconsistencies</b></p> <p><i>Special Feature:</i> Auto prompt to run check</p>	<p>Check for consistency across records, with user-defined parameters</p> <p>Review inconsistent records side-by-side, and make record-level edits</p> <p>Review summary and detail reporting for a clear picture of issues</p> <p>Run batch operations for file consistency issues</p>



Task Area	Tools
<p><b>Establish External Availability (Factor 1)</b></p> <p><i>Special Feature:</i> Recruitment Area Wizard (step-by-step intuitive menus)</p>	<p>Choose from census place, core-based statistical area, county, state, or advanced options (e.g., education level)</p> <p>Build and assign recruitment areas by job group or plan</p> <p>View composition report, availability worksheet to support recruitment area development</p> <p>By means of the wizard, validate and use employee/applicant Zip codes to build areas</p>
<p><b>Define Internal Availability (Factor 2)</b></p>	<p>Identify feeder (source) jobs by job title or job group</p> <p>Read feeders from promotion (and transfer) data</p> <p>Import feeders from another BALANCEaap plan</p> <p>If multiple source jobs feed a target job, weight those jobs</p> <p>Verify source jobs are lower than target jobs; remove downward movement</p> <p>Review calculations reporting to support feeder development</p>
<p><b>Determine Availability versus Employment</b></p> <p><i>Special Feature:</i> Apply Quick Weights (as calculated by the system) Factor 2 check</p>	<p>Assign factor weights</p> <p>Perform “what-if” analysis with different Utilization rules</p> <p>Review best Utilization rule report to support decision-making</p> <p>Import weights from another BALANCEaap plan</p> <p>Review (and edit) statistical settings</p> <p>View results by raw and weighted statistics, including underutilization, statistical value, and shortfall; show statistics in whole person or percent</p>
<p><b>Select History Source</b></p> <p><i>Special Feature:</i> Start Point analysis (if first plan)</p>	<p>Establish the historical starting point for reporting on goal attainment in the current plan</p>
<p><b>Develop IWD/Veteran Metrics</b></p> <p><i>Special Feature:</i> Displays current OFCCP benchmarks</p>	<p>Select data source for hiring overview analysis</p> <p>Import hiring overview settings from another BALANCEaap plan</p> <p>Calculate the number of jobs filled</p> <p>Set benchmarks, and perform analysis for both groups</p>
<p><b>Create Narratives/Collect Reports</b></p> <p><i>Special Features:</i> Narrative templates, with header/footer tools Default merge tags EEO-1 and VETS reporting tools</p>	<p>Customize Women/Minorities, IWDs, and Veterans narratives; save the templates for future use</p> <p>Import narratives from another BALANCEaap plan</p> <p>Turn on integration to pull in outreach data from BALANCEhub REACH</p> <p>Produce required reports and those for communicating internally</p> <p>Use report, calculation, filter, export settings</p> <p>Turn on BALANCEhub to facilitate report dissemination</p>



*AAP-required reports are shown below in blue*

**Narratives**

- Minorities and Women
- Individuals with Disabilities
- Protected Veterans

**Communication**

- Plan Summary (Annual plan)
- Progress Summary (Update plan)

**Employment**

- Job Group Analysis
- Job Group Analysis Summary
- Annotated Employee List
- Job Group Analysis by EEO Code
- Roster Checklist
- History Source Summary by Job Group
- History Source Summary by Job Code

**Workforce**

- Workforce Analysis *or*
  - Organizational Display *plus*
  - Supervisor By Department
- Annotated Employee List by Department
- Department Analysis
- Department Checklist

**Availability**

- Availability Factor Computation Form
- Incumbency vs. Estimated Availability
- Placement Goals
- Recruitment Area Worksheet
- Requisite Skills Calculations
- Department Analysis
- Department Checklist
- Feeder Job Calculations
- Shortfall
- Availability Worksheet
- Census Code Assignments
- Current Year Promotion Calculations
- Recruitment Area Composition

**Personnel Actions**

- Applicant Summary
- New Hire Summary
- Promotion Summary by Old Job
- Termination Summary
- Promotion Summary by New Job
- Promotion Summary for Goal Attainment
- Transfer Summary by Old Job
- Transfer Summary for Goal Attainment
- Termination Summary by Termination Code
- Involuntary Termination Summary
- Voluntary Termination Summary
- Promotion Pool Summary by Old Job
- Promotion Pool Summary by New Job
- Termination Pool Summary
- Involuntary Termination Pool Summary
- Voluntary Termination Pool Summary
- Applicant Checklist
- New Hire Checklist
- Promotion Checklist
- Transfer Checklist
- Termination Checklist
- Involuntary Termination Checklist
- Voluntary Termination Checklist
- Promotion Pool Checklist
- Termination Pool Checklist
- Involuntary Termination Pool Checklist
- Voluntary Termination Pool Checklist

IWD/Veteran

- Data Collection for Individuals with Disabilities
- Data Collection for Protected Veterans
- Individuals with Disabilities Utilization Goals
- Veteran Benchmark for Hiring Analysis
- Monitoring
- Goal Attainment
- Applicant Pool Analysis
- Labor Force Calculations
- Promotion/Hiring Comparison
- Adverse Impact Summary and Detail Applicants\*
- Promotions\*
- Transfers\*
- Terminations\*
- Involuntary Terminations\*
- Promotion Pool\*
- Termination Pool\*
- IWDs
- Protected Veterans
- \*by Favored Group, Traditional available*
- Compensation
- Roster Compensation Checklist
- Roster Compensation (Export File)
- Compensation Summary by Job Group
- Compensation Summary by Title
- Compensation Summary by Grade