

## 6.6 - Introduction to Departmental Planning Spreadsheet and Description of Columns

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One key modification for UW-Madison from the original design for the Compensation Administration Tool was the development of the Departmental Planning Spreadsheet (DPS) to facilitate the collection of funding changes and pay plan increase amounts from department chairs and departmental staff. In the past, many divisions used the Form 2A to facilitate that data collection process from departments. Like the Form 2A, the DPS lists all staff funded by a department along with all other funding splits for those individuals including those funded by other departments. In contrast to the 2A, the DPS also includes all individuals in their HRS home department, even if they have no budgeted funding in that department.

### ***Description of Departmental Planning Spreadsheet Columns:***

***PLEASE NOTE: DO NOT delete any rows or columns in the DPS as it will negatively impact the underlying code to upload the worksheet. You may filter blank rows if you would like to decrease the size of the worksheet.***

**“SUM OR DET ROW” COLUMN (Column A):** The DPS contains a summary row for each employee budget record with a funding distribution check, and total budgeted FTE. Each record also contains ten detail rows below the summary row, with each row representing the budgeted funding splits by line with the funding distribution percentage for each split. The split funding distribution percentages are then used to calculate budgeted FTE and budget salary by split in each detail row. All records must have ten detail rows below the summary row, regardless of actual number of funding splits. An S or D indicates whether this is a summary row or a detail row.

**“HOME DEPT JOB DATA DEPTID (UDDS)” (Column B):** Department ID -- A code that identifies the organizational department in which the job exists and is sometimes referred to as the HRS home department. The Deptid is 7 characters in length, which includes a 1-character campus code as the first character.

**“EMPL CLASS” (Column D):** Employee Classification -- A code assigned to a job record to group similar jobs. Example values include: FA = Faculty, CP = Permanent University Staff, CJ= Project University Staff, AS=Academic Staff, LI=Limited, ET1 to ET4 = Employees-in-Training.

**“JOB CODE” (Column E):** Job Code -- A code that identifies the employee's current job classification/title. Examples: C20NN (Professor), D51NN (Clinical Professor), 21311 (Payroll & Benefits Specialist).

**“PLANNED JOB CODE DESCRIPTION (TITLE)” (Column F):** Planned Job Code Description – The Planned Jobcode Description will be the current HRS Jobcode Title or an anticipated new title. The Planned Jobcode Description is pulled directly from CAT.

**“LAST NAME” (Column G):** Employee Last Name -- The employee name as entered in HRS. The case may be upper, lower, or mixed.

**“FIRST NAME” (Column H):** Employee First Name -- The employee name as entered in HRS. The case may be upper, lower, or mixed.

**“EMPL ID” (Column I):** Employee ID -- A unique identifier for a person that is assigned in HRS.

**“EMPL RCD #” (Column J):** Employee Record Number -- Identifies each job. For most employees, the number will be zero. Employees with multiple concurrent jobs will have a unique record number for each job, assigned sequentially based on date of hire for each job. Per UW policy, after a job ends, the employee record number will be reused for future jobs.

**“POSITION NUMBER” (Column K):** Position Number -- A number (which is unique to each position) that identifies various components of position data such as Job Code, Department, Business Unit, Location, Salary Plan/Grade, Hours/FTE etc. At UW-Madison, the position number is assigned at the time of creation of a new job through the Job and Employee Management System (JEMS) Hire.

**“PAY BASIS” (Column L):** Pay Basis -- Defines how compensation is structured. Example values: H= Hourly, A = Annual Year (12 month), C = Academic Year (9 month).

**“COMP RATE (1 FTE)” (Column N):** Compensation Rate -- UW\_COMPRATE is the full-time annual rate, full-time academic-year rate or hourly rate.

**“CAT PRE-MERIT RATE (1 FTE)” (Column O):** This rate will reflect the “COMP RATE (1FTE)” in HRS at the time the budget was loaded (hourly for university staff or full-time rate for LI/AS/FA/ET) plus any pending placeholder rate changes your divisional budget office staff were notified about and have entered in CAT.

**“DEPT” (Column U):** Funding Department ID -- A code identifying the combined codes for division, department and sub-department. Synonymous with DeptId.

**“FUND” (Column V):** Funding Code -- Identifies the source of funds. Some examples include: 101 = state funding, 128 = auxiliaries, 144 = federal grants & contacts.

**“PROG” (Column W):** Program Code -- A code that identifies the general purpose for which money is being spent. Options Include: 0=Student Services, 1=General Operations & Services,

2=Instruction, 4=Research, 5=Extension & Public Service, 6=Academic Support, 7=Physical Plant Maint & Svcs, 8=Auxiliary Enterprises & Svcs, 9=Student Aid, F=Farm Operations.

**“PROJ ID” (Column X):** Project Grant Number -- A code used by records that are organized by project. This code is made up of the fund and the proj/grant# – e.g. 150AB12. From February 2008 to June 2015, all newly created projects will begin with PRJ instead of the fund. Beginning in June 2015, all newly created projects will begin with AAA continuing through the alphabet instead of PRJ. Not all projects will be shown here. The budget will not include projects for funds 133 and 144. The budget will exclude project numbers for funds 135, 161, and 233 if funded by the School of Medicine and Public Health (SMPH).

**“DIST%” (Column Y):** Funding Distribution Percentage – All funding percentages will total 100% at load. This field represents the relative percentage of an employee’s funding per split. If a person is 1.0 FTE, the distribution percentage and FTE will be the same. However, for individuals less than 1.0 FTE, this field will not equal the budgeted FTE by split.

**“DIST%CHECK” (Column Z):** Funding Distribution Percentage Check -- The cell will turn red when the percent does not equal 100%. For shared employees, this may be less than or more than 100% as you will change only the funding splits that belong to you and leave the amounts as loaded for splits that belong to other departments and divisions.

**“BDGT FTE” (Column AA):** Budgeted FTE –This reflects the HRS job FTE at the time of the budget load and may be adjusted for any pending FTE changes your divisional budget office staff were notified about and have entered in CAT. Users can modify the amount in the summary row and then the detail rows calculate FTE based on distribution percentage per split.

**“BASE SALARY BY FUNDING (ADJ for BUD FTE)” (Column AG):** Final budgeted salary amount is displayed by funding split in dollars based on budgeted funding and budgeted job FTE. Please note that hourly staff annual budget amount is calculated based on 2,080 hours. This differs from the annual calculation for hourly staff in 3270 and HRS, which is based on 2,088 hours.

**“FTE CHANGE INDICATOR” (Column AK):** Column indicates in green and displays change from and to amounts if a department has made a change to budget FTE in column AA .

**“COMMENTS” (Column AL):** The summary row of the comments section is displayed in gray and may contain notes entered by divisional CAT administrators. The detail rows of the comments section are available for departmental staff notes. You may use this field to indicate pending rate changes to your divisional budget officer for entry in CAT.