

## SECTION 6

### COMPLETING BUDGET SALARY DETAIL – BUDGET POSITION REPORT

I. INTRODUCTION TO THE BUDGET POSITION REPORT .....	6-2
II. COLUMN ENTRY EXPLANATIONS AND INSTRUCTIONS	
A. BUDGET ID, NAME, AND TITLE.....	6-2
1. ....	
Budget ID.....	6-3
2. ....	
Sex Code.....	6-3
3. ....	
Proportional Funding Code.....	6-3
4. New Record Flag .....	6-3
5. Name.....	6-4
6. Title.....	6-4
B. TITLE CODE – MODIFER .....	6-5
C. ACCT/USER CODE & CIC (Comment Identifier Code).....	6-5
D. % Time (Percent Time) .....	6-6
E. UDDS (Org. ID).....	6-7
F. FUND-PROG ACT (Fund-Program Code).....	6-7
G. PERIOD ENTRIES.....	6-7
H. STATUS CODE.....	6-8
I. PY RATE – BUDGET.....	6-10
J. CY RATE – BUDGET .....	6-10
K. ADJUSTMENTS .....	6-12
L. MID-YEAR BASE ADJUSTMENTS AND REASON CODE.....	6-13
M. PROPOSED BASE ADJUSTMENTS AND REASON CODE .....	6-13
N. MERIT RELATED ADJUSTMENT .....	6-14
III. INSTRUCTIONS FOR PREPARING UNCLASSIFIED SUMMER SESSION BUDGETS .....	6-14

## SECTION 6

### COMPLETING BUDGET SALARY DETAIL – BUDGET POSITION REPORT

#### I. Introduction to the Budget Position Reports

Beginning in FY2008-09, the on-line Budget Position Reports (available at: <http://www.uwsa.edu/budplan/onlinereports.htm>) will replace the printed Form 2A that were previously used for preparing the budget salary detail that it may be entered into the budget position file via the terminal input system. The terminal entry of the Budget Position data, which is described in Section 7, remains the same as the Form 2A data entry. This section provides a description of the Budget Position Report layout.

Throughout these instructions “current” or “PY” refers to the budget year that is in effect as this document is being read. “New” or “CY” refers to the upcoming year being prepared.

As you read through the next two sections, it will be helpful to refer to a Budget Position Report. Please contact the Office of Budget Planning if you have any questions.

Completion of the Budget Position Reports is both an updating and a projecting effort. All approved changes which have occurred since the printing of the current budget (Redbook) are to be made on the Budget Position Reports as well as all proposed changes for the new budget year (i.e., merit increases, new positions, status changes, terminations, leaves).

The Budget Position Report creation window allows separate reports to be generated for unclassified (limited, faculty, academic staff, employees-in-training, and student appointees) and classified employees. While both reports have similar entries, there are some differences and these are described on the following pages.

The classified Budget Position Report has been updated from a recent payroll. The unclassified Budget Position Report will reflect current year budget detail or payroll information depending on an institution’s source of budget initialization. Vacant, group positions and deductions entries have not been brought forward to the new budget year.

After reading these instructions, you should check all pre-generated entries against your institution’s payroll, personnel and other records and update where necessary. Then complete your Budget Position Report by inserting all new entries. Running the Budget to IADS Comparison Report found at <http://www.mbo.wisc.edu/sys/budget/positionCompare.pl> may be used to assist with the comparison and should be run periodically during budget development.

#### **IMPORTANT NOTE:**

<p>The institution budget and personnel offices will be responsible for the accuracy of all data regarding unclassified and classified staff. This information is used in preparing the initial payrolls, etc. It is extremely important that the data are complete and accurate.</p>
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#### II. Column Entry Explanations and Instructions

A. BUDGET ID, NAME, AND TITLE.

1. Budget ID. An appointment number is assigned to each appointment. Check with your institution's payroll or personnel office for the correct appointment number.

New Individuals/Appointments. An individual can be added to your budget after the person ID, a unique number automatically assigned to every person, and corresponding appointment ID's are created in the payroll system.

Group and Other Entries. For all other new position entries (i.e., vacant, group, lump sum, and deduction), a special "unfilled position code" must be used. These specially coded numbers will consist of a letter prefix and an eight-digit number taken from the list of "Budget Unused Numbers for Unfilled Positions." Pages of these numbers can be obtained by contacting the Budget Planning Office. The letter prefix codes for Unfilled Positions are as follows:

R – Vacant Positions.

G – Group Positions.

Group positions are to be used only for student assistant positions; i.e., those with the titles of Teaching Assistant, Research Assistant, Program Assistant, Project Assistant, Graduate Assistant or Undergraduate Assistant.

L – Lump Sum Entries.

Typical unclassified lump sum entries are "additional staff" or "addl instruction."

Because of the requirement for budgeting and reporting student help as a separate item, the only permissible classified lump sum entries for part-time help are "Student Help" and "LTE." Titles such as "part-time help" and "extra labor" are not permissible. In areas where overtime payments are anticipated for classified employees, a lump sum for "Overtime" should be entered. In auxiliary, gift and federal budgets, lump sums for classified compensation increases should be shown as "Salary Increases."

D – Deduction Entries (e.g. Less "Savings", Less "Reimbursement", etc.)

J – Negative Position Entries

2. Sex Code. This indicator, located to the right of the budget ID, is used to indicate the sex of the employee. An "M" for males and an "F" for females is required.
3. Proportional Funding Code. This indicator, located to the right of the Sex Code, designates whether an employee is proportionally funded. Proportionally funded employee rate information can be changed through BADJR or BRATE, while rate modifications for employees who are not proportionally funded must be completed in BDGT for each Org. ID Code.
4. New Record Flag. The new record flag, located to the right of the Proportional Funding Code, is required if a new appointment, vacant, or group position did not appear in the CURRENT budget document (Codes A or B) or under special circumstances (Code C).

Code

- A Use this code for individuals who are now on the university payroll or will be on the university payroll on or before June 30<sup>th</sup> of the CURRENT year. (See Code C below for special circumstances.)
- B Use this code for:
- 1) All new individuals starting on or after July 1<sup>st</sup> of the NEW budget year.
  - 2) All vacant positions, student assistant group positions, lump sum entries and deduction entries.
- C Use this code for:
- 1) All unclassified staff who have a contract anniversary date other than July 1<sup>st</sup> or the start of the academic year.
  - 2) All unclassified staff who appear in the CURRENT budget but are being treated as new appointments for merit purposes.

Codes B and C remove the individuals from the continuing staff base used for monitoring merit. These individuals are not eligible for a merit increase.

5. Name. The name, as it appears in the Integrated Appointment Data System (IADS) person file will automatically appear on the updated Budget Position Report after terminal entry. It is necessary to enter the correct person ID to update the budget file using terminal program BDGT. The name can not be added using budget update programs.
6. Title. Unclassified and classified staff titles, and the explanatory data for lump sum and deduction entries, are entered in this column.
- a. Unclassified Titles. The title appearing in the printed budget (Redbook) for each unclassified appointment will be generated by the alpha-numeric title code entered in the "Title Code" column. Section 5 contains a listing of all available titles and their corresponding codes. Section 5 should be consulted to assure that all titles are properly used and that they accurately describe the nature of the work performed.

Where an individual has more than one title, he/she has more than one appointment. If there is no dollar salary amount applicable to one of these appointments, enter "0" in the NEW budget column on the line where that title appears.

**IMPORTANT NOTE:**

<p><u>No title will print in the Budget Document (Redbook) that does not have either a dollar salary entry or a zero (0) entry in the salary field, applicable to the NEW budget year.</u></p>
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- b. Classified Titles. Only the standard Office of State Employee Relations titles, as printed in the Alphabetical Listing of Classifications for the Current year at <http://oser.state.wi.us/docview.asp?docid=1425>, may be used. The classified title to be printed is determined by the title code entered in the "title code" column. If a

supplementary status designation (such as trainee, apprentice, or seasonal) is applicable to a position, it should be indicated by use of the appropriate special code in the "SC" column.

B. TITLE CODE – MODIFER.

1. Unclassified Titles Codes. Each unclassified appointment shown on the Budget Position Report is identified and described by a title code consisting of a function, prefix, scope and modifier (e.g., A10-N-N-L, C20-N-N-T) entered in the title code column. The alphabetic "status modifier" is incorporated into the budget title code to allow differentiation between the various appointment categories (tenure, probationary, fixed term, etc.) described in Section 5 of these instructions. The "status modifier" must be changed whenever there is a change in the appointment category of a position.
2. Classified Title Codes. For the classified staff a five digit title code from the Alphabetical Listing of Classifications must be used.

Indicate title code only once since the same title code applies to all funding splits.

C. ACCT/USER CODE & CIC (Comment Identifier Code). Two types of entries are permitted in this row, located below the unclassified and classified title codes: (1) Account/User Code entries and (2) CIC (Comment Identifier Code) entries. Each of these is discussed below.

1. ACCOUNT USER CODE ENTRIES. An account code or user code can be entered in this field. One Org. ID, Fund and Program may have one or more account or user codes.
2. CIC (Comment Identifier Code) ENTRIES

- a. Comment information, when required, is to be entered in the TITLE CODE-MODIFER column on Budget Position Report.

Each comment must have a two letter "comment identifier code" which should appear under the unclassified and classified title codes on the Budget Position Report, preceding the comment to which it applies. "Comment identifier codes" for the various types of comments are as follows, listed in the sequence in which they will appear when there are multiple types of comments.

CU	=	"Unit" Comment
CV	=	"Unit" Comment
SP	=	"Special Professorship" Comment
CA	=	"County Agent" Comment
CP	=	"Position" Comment
CT	=	General Information Comment
CW	=	General Information Comment

- b. All Comments may have more than one line of comment data, but each individual line is limited to 39 spaces - including punctuation and blank spaces.

When there are multiple lines, the respective "comment identifier code" must appear on each line of the comment, followed by a number indicating the sequence of the line. The number for the first comment line must be 1; the number for the last comment line must be 9; and then the other lines, if any must be given consecutive numbers beginning with 2.

c. Each type of comment is explained below:

CU/CV ("Unit" Comments) - A unit comment should be used when the comment relates to a particular Org. ID split rather than the entire appointment. There can be multiple "CU"/"CV" comments for an appointment but only one "CU"/"CV" comment is allowable per appointment in a particular department. Use the "CU" comment identifier code when there is only one unit comment for a particular split. Use the "CV" comment (in combination with "CU") as a secondary unit comment when it is necessary to have two separate comments in the same Org. ID.

SP ("Special Professorship" Comment) - This is a one line comment which designates the name of a Special Professorship. This type of a comment will print in each place the appointment appears. Only one "SP" comment is printed for an appointment.

CA ("County Agent" Comment) - This is a one line comment which is only to be used by University Extension for County Agents. The comment should show the county; the type of County Agent; and the amount of salary, if any, to be paid by the county. An "A" or "B" special code is required when a "CA" comment is used.

CP ("Position" Comment) - This type of comment relates to an entire appointment and will print in each place the appointment appears. Only one "CP" comment is permitted for an appointment.

CT/CW -These comments can be used for general information or notes. They are noted on the Budget Position Report only in the Org. ID in which the comment is entered. (They do not print in the Red Book)

D. % Time (Percent Time). Where there is only one salary line for an appointment, that line is the full time rate line. Where there are multiple salary lines for an appointment, the top salary line is the full time rate. The percent time entry shown on the % time line indicates the proportion of employment in the entire UW System for an appointment budgeted for a specific length of time. A percent time entry must be made for all appointments and vacant positions. Group positions, lump sum amounts, deduction entries, and positions where the only salary entry is zero do not require a percent time entry. The percentage of full time employment for the CURRENT year will already appear on the full time line for all pre-generated entries. This percentage should be changed when necessary to reflect a new allocation for the NEW year. When a new appointment is being established, it is necessary to insert the percent of full-time employment on the full time rate line. An individual employed full time for the first semester only would be shown at 100% time with the length of time indicated in the period column. Use only whole percents for full time rate line percent time entries. Round upward from a .5% (e.g., 63% rather than 62.5%; 67% rather than 66.7%).

For multiple appointments/salary splits, the percent time for each split will be displayed. For unclassified appointments it is not necessary to enter those percents on the Budget Position Report since the computer will automatically calculate them. However, it is essential that the total appointment percent be indicated on the full time rate line. For classified appointments it is mandatory that the dollar amount exactly equal the percent shown. All split percentages must be whole numbers (e.g., 33%, 67%).

- E. UDDS (Dept. ID). Also known as the Dept. ID code, this code represents the unit number, division number, department number, and sub-department number.
- F. FUND-PROG ACT (Fund-Program Code). University numeric fund and program codes are used to identify the source of salary support and function. They must accompany all rate entries except amounts with NA or LV exception codes and zero (0) entries.

All pre-generated fund number and program code entries should be verified and corrected when necessary.

- 1. Fund Numbers. The fund numbers to be used are listed in Section 3 of these instructions. An individual's salary may be supported by several funding sources.

For example, the NEW budget year rate for an unclassified position which is split equally between three funds might appear as follows:

	12,600 A
101-2	4,200
133-4	4,200
141-2	4,200

The 133 entry identifies a planned charge to a gift fund for 1/3 salary support. The 101 entry identifies that portion of the rate being charged to GPR/Fee funds and 141 identifies that portion charged to Federal Morrill-Nelson funds.

- 2. Program Codes. In the Fund Number example under "1." above, note that each fund number is followed by a hyphen and a single digit. This digit is the Program Code, and it refers to one of the following function categories used in University budgeting and accounting:

0 - Student Services	6 - Academic Support
1 - Institutional Support	7 - Physical Plant
2 - Instruction	8 - Auxiliary Enterprises
3 - Hospitals	9 - Financial Aid
4 - Research	& - Farm Operations
5 - Public Service	

The appropriate Program Code should be inserted following each fund number. Refer to section 2 for program definitions.

G. PERIOD ENTRIES.

a. A "period" entry is ordinarily used in situations where the actual pay period for a particular NEW year rate entry does not coincide with the pay period specified by the pay basis code.

b. Unclassified Staff - The three types of valid entries are shown below:

SEM1 To be used for a C pay basis appointee who will be employed for the first semester only.

For example: If a C basis (academic year) appointee - whose full time C basis rate is \$15,000 - will be employed for the first semester only, enter "SEM1" in the period column. The entries would appear as:

SEM1	15,000 C
	7,500

SEM2 To be used for a C pay basis appointee who will be employed for the second semester only.

00/00-00/00 Spacing format to be used for:

(1) A pay basis salary item to be paid on other than a 12 monthly installment basis.

For example: If an A pay basis appointee will be employed starting September 16<sup>th</sup> rather than July 1<sup>st</sup> enter "09/16-06/30" and show the actual salary and full time rate as illustrated below.

09/16-06/30	12,000 A
	9,500

(2) C pay basis salary item to be paid on other than academic year basis, SEM1 or SEM2 basis.

(Note: All dates must fall within the NEW year when an "A" or "C" pay basis code follows the specific salary item to which the period entry applies.)

c. Classified Staff - All period entries for staff employed for less than the full year must be shown as a number of months - to tenths of months - rather than as specific dates.

EXAMPLES:

10.1  
9.0

H. STATUS CODE. This indicator, formally known as "*Special Code*," is located to the right of the period entry. For unclassified staff its function is to indicate special academic status. For classified staff the "Special Code" is used to indicate each classified employee's status.

1. Unclassified Staff Special Codes.

Code

- F University Faculty Status: This code will appear as a pre-generated entry for persons in former Chapter 36 institutions who had this designation in the CURRENT budget.
- A Part-Time County Agent (Applies to University Extension Only): Insert this code for all part-time County Agents. When this code is used, it must be accompanied by a one line comment showing the County; the type of County Agent; and the amount of salary, if any, to be paid by the County. This comment is limited to 39 spaces.
- B Full-Time County Agent (Applies to University Extension Only): Insert this code for all full-time County Agents. When this code is used, it must be accompanied by a one line comment showing the County; the type of County Agent; and the amount of salary, if any, to be paid by the County. This comment is limited to 39 spaces.
- Y Statute Determined Executive Salary Group Designations: [Per s. 20.923 (4)]. This code is used to designate individuals covered by the State Executive Salary Plan whose positions have been assigned to a specific executive salary group by Statute. Chancellors and most Vice Chancellors are included in this group (maximum of one Chancellor and one Vice Chancellor per institution may have a Special Code Y). These individuals are excluded from the continuing staff base for salary purposes.

2. Classified Staff Special Code. One of the following codes must be used for each classified position budgeted on the Budget Position Report.

Code

- P Permanent and Probationary Employees.
- S Seasonal Employees. This code should be used for all appointments of a seasonal nature including academic year appointments to members of the classified service. When using this code, the number of months to be worked must be indicated in the period column.
- B Project/Project Employees. Use this code to identify a project employee filling a project appointment.
- C Project/Permanent Employees. This code is used to identify a person with permanent status in the classified service who has elected to assume a project appointment.
- T Trainee. This code is to be used for all classified employees in training status, except those in craft appointments.
- A Apprentice. This code is to be used only for classified employees in training status working in the crafts.
- R Red Circle Rate Employees. This code should be used for all individuals whose current salary is above the maximum of their range.

- I. PY RATE – BUDGET. This column will carry the pre-generated CURRENT year pay basis code and rate of pay for appointments in the CURRENT year budget document. No changes can be made to any figure in this column. If a change occurred during the CURRENT year, or the pre-generated entry is incorrect, the change should be entered in the adjustments column showing the increase or decrease increment expressed as a yearly total.
- J. CY RATE – BUDGET. The NEW budget year salary rates should be entered here. Three types of entries are permissible in this column: Pay Basis Code, Rate of Pay and Exception (Non-Adding) Code. Each of these is discussed in detail below.
1. PAY BASIS CODE. This letter code is entered in the first position of the field and specifies the basis for computing and paying the dollar amount that follows. The code should be inserted as a prefix to all amounts in this column except lump sum amounts, deduction amounts, cross reference amounts, and zero (0) entries.
    - a. Unclassified Staff.  
Code:  
A - Specifies a salary on a 12-month basis (July 1<sup>st</sup> through June 30<sup>th</sup>)  
C - Specifies a salary paid for the academic year.
    - b. Classified Staff.  
Code:  
H - Specifies an hourly basis salary, payable in bi-weekly installments.

2. RATE OF PAY.

a. Unclassified Staff.

- 1) Insert the NEW budget year rate resulting from the logical extension of the entries in the current year budget, adjustment and other increase columns. All NEW year rate entries should be budgeted to the nearest dollar; cents should never be shown. (See the following page for examples of how certain types of entries should appear on the Budget Position Report.)

When the percentage of full time employment is less than 100%, the budget year rate entry (or the combined salary total when there are multiple salary splits) must be the exact amount - to the nearest dollar - obtained by multiplying the full time rate by the percentage of full time employment. (See example 2 on the following page.)

The full time rate must be indicated on the full time rate line for all part time appointments (including employees in training), for student assistant group positions and for positions with multiple salary splits.

When entering the full time rate for a student assistant group position, be sure to use the established full time rate for the particular type of student assistant position.

**Example 1:** A full time associate professor whose CURRENT budget rate is \$29,000 on an annual (A) basis and who is to receive a \$1,000 proposed base adjustment (for major change in assignment) and a \$1,000 merit increase would have the following entries:

<u>% Time</u>	<u>Fund-Act.</u>	<u>CURRENT Budget</u>	<u>NEW Budget</u>	<u>Adj.</u>	<u>Mid-Year Base Adj.</u>	<u>Proposed Base Adj.</u>	<u>Merit Increase</u>
100	101-2	29,000	31,000 A	0	0	1,000 (001)	1,000

If the same individual is supported equally on each of three funds, the column entries might appear as follows:

<u>% Time</u>	<u>Fund-Act.</u>	<u>CURRENT Budget</u>	<u>NEW Budget</u>	<u>Adj.</u>	<u>Mid-Year Base Adj.</u>	<u>Proposed Base Adj.</u>	<u>Merit Increase</u>
100		29,000	31,000 A	0		1,000 (001)	1,000
33	101-2	9,666	10,333	0	0	333	333
33	133-4	9,666	10,333	0	0	334	333
34	144-4	9,667	10,334	0	0	333	334

**Example 2:** A part time employee (67%) on an academic year (C) basis, whose CURRENT budget rate is \$10,050 for two-thirds time and who receives a \$653 merit increase (67% of \$975). The column entries would be:

<u>% Time</u>	<u>Fund-Act.</u>	<u>CURRENT Budget</u>	<u>NEW Budget</u>	<u>Adj.</u>	<u>Mid-Year Base Adj.</u>	<u>Proposed Base Adj.</u>	<u>Merit Increase</u>
67		15,000	15,975 C	0	0	0	975
67	101-2	10,050	10,703	0	0	0	653

**Example 3:** An individual who is employed part time (e.g., 80%) on an academic (C) basis for only a portion of the budget year, such as the first semester only, and whose NEW full time rate is \$16,000. The % Time and NEW Budget entries would be as follows.

<u>% Time</u>	<u>Fund-Act.</u>	<u>Period</u>	<u>NEW Budget</u>
80			16,000 C
40	101-2	SEM1	6,400

- 2) Where there is no change of status that would dictate a different rate, the following rules apply for converting from an academic rate of pay to an annual rate of pay, or vice versa, and the conversions should be made before rate increases are included:

To convert from an academic rate to an annual rate, multiply the academic rate by 1.2222.

To convert from an annual rate to an academic rate, divide the annual rate by 1.2222.

b. Classified Staff.

- 1) For appointments and vacant positions, the NEW budget year rate should be the amount computed on the basis of the new hourly rate multiplied by 2,088 hours. The full time rate - expressed as an hourly rate rather than as an annual rate (e.g., as 4.776 H rather than 9,972) - must be entered on the full time rate line for each position.
- 2) Every classified split (including splits between departments and splits between funds and activities) must be budgeted to the exact amount - to the nearest dollar - obtained by multiplying the full time annual rate by the % time for each split. (NOTE: The % time for each split must always be expressed as a two digit percentage figure; i.e., as 33% rather than 33.3%)

**Example:** An individual whose NEW annual rate is \$16,829 and whose time is split equally between three departments would be shown as follows:

8.060 H  
5,554 (.33 x 16,829: not .333 x 16,829)  
5,554 (.33 x 16,829: not .333 x 16,829)  
5,721 (.34 x 16,829: not .333 x 16,829)  
16,829

3. EXCEPTION (NON-ADDING) CODE. There are a number of rate entries which should not be added into the summary totals, but are essential to understanding the remaining salary detail. These entries must be followed by one of the exception codes which appear below.

Code

- NA To indicate a non-add item, i.e., paid from another department, division or institution.
- LV To indicate Leave Status.
- \* To indicate the full time rate for an appointment.
- \*\* To indicate the full time annual rate for a classified appointment that is part time and/or paid from more than one department, fund, or activity.

K. ADJUSTMENTS. This column is used only for adjustments of a technical nature as specified under sections 1. and 2. below. All unclassified entries for midyear and proposed base salary adjustments and other adjustments are to be made in designated columns.

Permissible entries in this column are different for unclassified and classified appointments as specified below:

1. Unclassified Staff Adjustments.

- a. Changes in rate for Student Assistant Group positions.
- b. Changes in the rate for vacant positions.
- c. The hiring rate of individuals added during the CURRENT year.
- d. The NEW year rate for individuals starting on or after July 1<sup>st</sup> of the NEW year.
- e. The NEW year rate for any new vacant position being added.
- f. Shifts between funds and activities from the CURRENT year to the NEW year.
- g. Shifts between divisions or departments from the CURRENT year to the NEW year.
- h. Conversion from an annual to an academic pay basis, or vice versa.
- i. Adjustments for staff who terminated and were later rehired.

2. Classified Staff Adjustments.

- a. Pay plan, performance awards and negotiated increases for the CURRENT year which are not included in the CURRENT year budget.
- b. Probationary step increases already granted or increases to be granted before the start of the NEW year.

- c. Reclassification increases already approved.
- d. Trainee rate adjustments occurring during the CURRENT year.
- e. The CURRENT year rate of pay for individuals added during the CURRENT year.
- f. The CURRENT year rate for any new vacant positions being added during the NEW year.
- g. Shifts between funds and activities from the CURRENT year to the NEW year.
- h. Shifts between divisions or departments from the CURRENT year to the NEW year.

- L. MID-YEAR BASE ADJUSTMENTS AND REASON CODE. Unclassified salary adjustments already in effect or to be effective prior to July 1<sup>st</sup> should be entered in this column. A reason code (see J. below) must accompany these adjustments. If none of the reason codes is appropriate, contact Gary Buehler in the System Budget Planning Office at 608/262-6715.

Refer to Unclassified Personnel Guideline #4 for all mid-year (and proposed) adjustments which provide for correction of documented salary inequities under s. 36.09 (1)(h) and for major changes in duties (e.g. for assistant director to director) under "J."

- M. PROPOSED BASE ADJUSTMENTS AND REASON CODE. Unclassified salary adjustments to be effective with the beginning of the NEW year should be entered in this column. Refer to the following list in determining the proper reason code:

- 001 - CHANGE IN DUTIES/RECLASSIFICATION - Reflects significant growth in training and experience with resulting expansion of job responsibilities or change in job duties.
- 002 - REALLOCATION - Means the assignment of a position to a different class by the department of employment relations as provided in s. 230.09(2) of Wisconsin State Statutes.
- 003 - PROMOTION/PROGRESSION - An increase associated with promotion/progression reflecting the job growth due to experience and training.
- 004 - ROUNDING ADJUSTMENT - For budget to HRS salary adjustments
- 005 - GROUP EQUITY - Correction of an inequity identified through analyses of groups and employees.
- 006 - INDIVIDUAL EQUITY - Correction of an inequity identified through analysis of individual faculty or academic staff with comparable training, experience and responsibilities.
- 010 - SCHEDULE CHANGE (ET,SA) - Change in schedule for Student Assistants and Employees in Training.
- 011 - EXTERNAL RATE SETTING (e.g., VA Hospital, County Agents).
- 013 - TRAINEE -Not for LTEs, FA or LIs
- 015 - DIFFERENT PAY BASIS - Conversions from A to C or C to A pay basis; Pay basis changes from C/A to HRLY should be treated as a new employee record.
- 016 - PREVAILING RATE SETTING - Craftworkers only
- 018 - MANDATORY - Used when a System or State policy/budget action states that the set increase is being put into place.

- 019 – MERIT - Per pay plan guidelines
- 022 – MARKET FACTOR/OUTSIDE OFFER - Use only when a documented outside offer exists.
- 023 - RAISE TO CAMPUS MINIMUM - Salary must be at or above the campus minimum.
- 024 - EDUCATIONAL ATTAINMENT - Adjustment for completion of higher degree (Faculty only (e.g. Instructor to Assistant Professor)).
- 025 - TEMPORARY CHANGE IN DUTIES- Temporary Assignments. This reflects the rate increase at the start of the temporary assignment, and the rate decrease at the end of the temporary assignment (Unclassified Only paired with TBAE (064)).
- 030 - DUE TO TITLE APPEAL - Used when an employee wins a title appeal (no change in duties).
- 031 – RE/ACTIVATED RATE (FA, AS) - Per UPG 4.04 (5)
- 035 – RAISE TO SCHOOL/COLLEGE MIN – Madison Campus Only
- 041 – PARITY - Pay Plan/Contract specific
- 046 – GRID PLACEMENT - Contract specific
- 047 – DEACTIVATE RATE (FA, AS) - Zero out rates for FA or AS who are hired into LI concurrent jobs
- 050 – ANNIVERSARY ADJUSTMENT – Per union contract
- 051 – STRUCTURAL ADJUSTMENT - Per union contract
- 052 - MULTIPLE ADJUSTMENTS - Two or more adjustments with the same effective date (Will **not** be passed to HRS with FY Init)
- 054 – NEW TITLE ASSIGNMENT - Used when System or OSER establishes a new title, and employees are moved into that title (no change in duties)
- 055 – TEMP RATE END - Classified Permanent Only paired with end code of (085)
- 061 – SENIORITY STRATIFICATION - Per union contract
- 063 – MATCH UW SYSTEM RATE (L/I)\* - L/I = Location/Institution title code specific (See UPG 1)
- 064 – TEMPORARY ADJUSTMENT END – Unclassified Only. Per UPG 4.08 (7) paired with begin code of (025)
- 067 – CHANCELLORS DISCR INCR - Only when a Pay Plan exists and determined by each UWS Chancellor
- 072 – DISCRETIONARY MARKET ADJ - Pay Plan/Union Contract specific
- 075 – LTE INCREASE - For Classified LTEs only
- 078 - HIGH DEMAND FACULTY - Salary increase to attract/retain faculty designated as High Demand.
- 080 – MARKET FACTOR/COMPETITIVE - For FA (annual report pulled by UWSA)
- 081 – MARKET FACTOR/RETENTION - For FA (annual report pulled by UWSA)
- 082 – MARKET FACTOR/CLASSIFIED - Pay plan specific
- 083 – MSN POST TENURE REVIEW INCMNT - Madison Campus only
- 084 – MSN COMPRESSION-EQUITY FUND - Madison Campus only
- 085 – TEMP TRANSACTION RATE BEGIN - Classified Permanent Only (paired with 055)
- 086 – STUDENT HELP INCREASE - SH employee class only
- 089 – DISCRETIONARY MERIT COMP - Effective 1/1/2012 per Classified Compensation Plan. Should be used for base rate adjustments as approved by OSER.
- 100 – RIPPLE – System automatic code – not for manual use

N. MERIT RELATED ADJUSTMENT. These columns are used exclusively for entering merit increase and across-the-board adjustments for faculty, limited and academic staff. Do not enter any figures in this column on the classified Budget Position Report. Classified merit increase recommendations are entered only on the Form 11A.

Changes in the rate of filled or vacant graduate assistant positions should be entered in the Adjustments Column and not in the Merit Increase Column.

When a salary is split between various funds, the increases described in J. through L. must be split proportionately. (See Section 7 II, Page 7-14, for BADJR transaction.)

### III. INSTRUCTIONS FOR PREPARING UNCLASSIFIED SUMMER SESSION BUDGETS.

Summer Session budgets are to be submitted as part of the NEW budget request. In general, the same instructions for preparation of Budget Position Reports which apply to the regular session also apply to summer session. In presenting their summer session budget, institutions have the option of (1) budgeting summer session costs at the college level or below in a separate summer session division or (2) grouping summer session and academic year costs together, by departments, in regular academic divisions. Those institutions electing to group summer session and academic year costs together must identify the direct summer session salary costs separately by department. Under either option, the summer session salary costs may be budgeted as individual positions (Vacant or Filled) or as lump sum amounts.