**Adjust the Institutional Planning Spreadsheet – Comp Admin Tab**

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| Step | Action |
| 1 | Open your saved **IPS file** with all the data copied in from the IR. |
| 2 | Answer the **Question 1** column in the IPS to decide if the employee should be **included** in the IPS Upload to CAT. Answering **No** effectively deletes these employees. |
| 3 | Answer the Question 2 column in the IPS to decide if the employee should be included as part of the **Continuing Staff Base (CSB)**. If you answered No for Question 1, the cell for Question 2 in the next column will turn red, because an employee who is not being budgeted for in the next fiscal year cannot be part of the CSB. |
| 4 | Navigate to the '**Merit Increase Amount (%)**' (Column 64 for Cumulative, 36 for Off-Base). You can enter an increase for $ or %, but not both. Enter your desired Merit increase, and double click the bottom right corner of the cell to copy down the value to all cells in range. |
| 5 | Navigate to the **'Other Pay Rate Adjustment #1** **Action Reason**' (Column 34 for Cumulative) or **'Merit Pay Rate Adjustments'** (Column 34 for Off-Base). Select an **Action Reason** from the drop-down list. |
| 6 | If you want to **copy this Action Reason** for a large group, manually copy and paste the Action Reason for each employee. This cannot be autofilled. Assign a $ or % value through the same process as step 4. There are sections for up to five Action Reasons. |
| 7 | Many of the parameters can be **filtered** to apply changes to certain groups of employees. For example, filter Pay Basis (Column 17) to a certain type of employee, then navigate to **'Other Pay Rate Adjustment #1 Action Reason'** (Column 34 for Cumulative, Column 41 for Off-Base) to select an action reason and apply the corresponding $ or % increase. |
| 8 | To **add an additional funding source** for an employee, Select an employee with fewer than the full five funding sources. |
| 9 | Add in the required data for the new source starting in Column 83 (or further to the right, depending on the number of sources that already exist), and enter **Business Unit GL, Fund Code, Department, Program,** and **Project ID** (if desired). |
| 10 | Enter a value in **'Distribution Percentage from [#]'** (Column 88), then change the **'Distribution Percentage from [#]'** (Column 82) and Distribution Percentage from 2' (Column 88). These distributions must sum to 100%. |
| 11 | To remove a funding source, navigate to the **funding section** of the IPS, starting in Column 77. Select an employee with more than one funding sources. |
| 12 | Delete any existing data for the source starting in Column 83 (or further to the right, depending on the number of sources that already exist). Delete **Business Unit GL, Fund Code, Department, Program,** and **Project ID**. |
| 13 | Delete the **Distribution Percentage**, then change the other **Distribution Percentages** so the remaining sources sum to 100%. |
| 14 | Save the **IPS file**. |