

# 6.5 Additional Adjustments (AAP) Page

## Table of Contents

- Purpose and Overview ..... 1
- Procedure Steps ..... 3
- Vacant Positions ..... 4
- Other Budget Adjustments ..... 6

## Purpose and Overview

The Additional Adjustment Page (AAP) supports the planning and budgeting of Group, Lump, Vacant, and Negative positions. The page is divided into two sections:

1. Vacant Positions
  - a. This section will contain all entries with FTE
  
2. Other Budget Adjustments (Entries without FTE, formerly Lumps and Deductions)
  - a. This section will contain all entries that do not contain FTE

Fiscal Year: 2017  
 Business Unit: UWMSN Funding Department: A531200 SMPH/BIOSTAT & MED I/BIOST&M I

Delete Funding Dept

Vacant Positions												
*Adj Type	Position Number	*Job Code	Title	Pay Basis	FTE	*Fund	Deptid	*Prog	Project	Full-Time Base	Budgeted Amount	Description
1	FA/LI/AS	41060	SCI MGMT SUPERVISOR	A	1.000000	233	531200	4		\$75,000,000	\$75,000,000	Replacing T. Funke
2	Grad Asst	Y42NN	PROGRAM ASST-REG	A	5.000000	233	531200	4		\$40,000,000	\$200,000,000	Graduate Assistants
3	FA/LI/AS	Z99NN	ACADEMIC STAFF	A	-1.000000	101	531200	4		\$100,000,000	\$-100,000,000	Balancing Entry
1										Total Vacant Budgeted Amount: \$175,000,000		

Other Budget Adjustments												
*Adj Type	FTE	*Fund	Deptid	*Prog	Project	Full-Time Base	Budgeted Amount	Description				
1	Student Help	0.000000	233	531200	4		\$45,000,000	Supt Staff				
2	Univ Staff	0.000000	233	531200	4		\$150,000,000	Overtime				
3	FA/LI/AS	0.000000	101	531200	4		\$-50,000,000	Balancing Entry				
2												

The new process for adding Group, Lump, Vacant and Negative positions varies considerably from the Legacy Budget System’s process. The new process requires users to setup a Funding Department that will allow the entry of multiple Vacant and Other Budget Adjustments on the same page. Once the Funding Department is setup, all entries on the page will have the same Funding Department but will cover all funds, programs and projects for that particular Funding Department.

In the example below, the Funding Department is A531200 and it contains Vacant and Other Budget Adjustments for both fund 233 and 101. In order for a user to enter Vacant Positions or Other Budget Adjustments for a different Funding Department, the user will need to create a new AAP page for the other Funding Department.

Fiscal Year: 2017  
 Business Unit: UWMSN Funding Department: A531200 SMPH/BIOSTAT & MED I/BIOST&M I Delete Funding Dept

**Vacant Positions**

*Adj Type	Position Number	*Job Code	Title	Pay Basis	FTE	*Fund	Deptid	*Prog	Project	Full-Time Base	Budgeted Amount	Description
1 FA/LI/AS		41060	SCI MGMT SUPERVISOR	A	1.000000	233	531200	4		\$75,000.000	\$75,000.000	Replacing T. Funke
2 Grad Asst		Y42NN	PROGRAM ASST-REG	A	5.000000	233	531200	4		\$40,000.000	\$200,000.000	Graduate Assistants
3 FA/LI/AS		Z99NN	ACADEMIC STAFF	A	-1.000000	101	531200	4		\$100,000.000	\$-100,000.000	Balancing Entry

Total Vacant Budgeted Amount: \$175,000.000

**Other Budget Adjustments**

*Adj Type	FTE	*Fund	Deptid	*Prog	Project	Full-Time Base	Budgeted Amount	Description
1 Student Help	0.000000	233	531200	4		\$45,000.000	\$45,000.000	Supt Staff
2 Univ Staff	0.000000	233	531200	4		\$150,000.000	\$150,000.000	Overtime
3 FA/LI/AS	0.000000	101	531200	4		\$-50,000.000	\$-50,000.000	Balancing Entry

The AAP allows for users to budget group positions for all Adjustment Types. For example, if a user has 5 vacant accounting positions, they have the ability to group all the vacancies on one row (See the example below). Note: When budgeting group positions, the full time amount must be within salary range minimums and maximums for the Job Code. The AAP will allow you to save your page if you are outside the salary range but this will trigger an error on the Record Errors Report.

**Addl. Adjustments**

Fiscal Year: 2017  
 Business Unit: UWMSN Funding Department: A022011 G SERV/HUMAN RES/ADMIN SERV Delete Funding Dept

**Vacant Positions**

*Adj Type	Position Number	*Job Code	Title	Pay Basis	FTE	*Fund	Deptid	*Prog	Project	Full-Time Base	Budgeted Amount	Description
1 Univ Staff		00203	AUDITOR - JOURNEY	H	5.000000	101	022011	1		\$56,000.000	\$280,000.000	Group

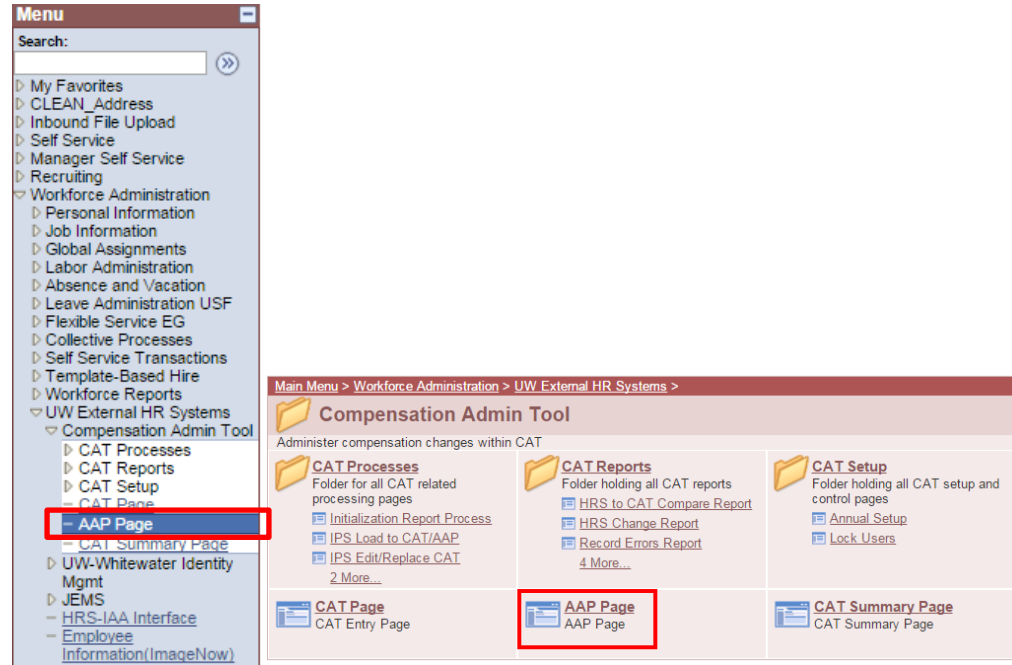
The AAP interfaces to the current budget system, but does not transfer data to HRS. Data entered on the AAP will pass to the CAT Position Report, BSUM and SFS/WISDM. Note: The Adjustment Type selection on the AAP (i.e. Univ Staff, FA/LI/AS, Student Help, etc.) determines the Staff Type in BSUM.

All funding entered on the AAP will need to pass CAT budget edits. CAT Budget edits do not require an entry in the Project field even for funds that typically require projects (e.g. 144, 233, 150, etc.). However, if a project field is entered, it must be open as of the beginning of the new fiscal year.

**Save the AAP after each Vacant Positions or Other Budget Adjustment entry. Saving the page will run the page edits to check for any funding or any other entry errors. Users will not be able to save the AAP page until all errors are corrected.**

## Procedure Steps

1. Navigate to the Additional Adjustments Page (AAP)
  - a. Log in to HRS and navigate to Workforce Administration > UW External HR Systems > Compensation Admin Tool > AAP Page (shown in the images below).



2. Add a new Funding Department or look up a Funding Department already created in the AAP.
  - a. To add new Funding Department, make sure the “Add a New Value” tab at the top of the page is selected. Enter the Funding Department information.
    - i. Note that all fields are required (Unit identifier “A” is required for the Funding Department) **Ex: A531200 and not simply 531200**
    - ii. Click “Add” to create a new Funding Department.

### UW CAT Additional Adjustments

Find an Existing Value **Add a New Value**

Fiscal Year: 2017  
Business Unit: UWMSN  
Funding Department: A531200

Add

- b. To look up existing AAP records, make sure the “Find an Existing Value” tab at the top is selected. Enter the desired search criteria.
  - i. Leaving a field blank will return all the possible values for that field in the search.

- ii. Click the magnifying glass symbol next to any field to search for possible values.
- iii. Click “Search” to find results.
- iv. If no results appear, the Funding Department has not yet been created.

**UW CAT Additional Adjustments**

Enter any information you have and click Search. Leave fields blank for a list of all values.

Search Criteria

Fiscal Year: [=] 2017

Business Unit: [begins with]

Funding Department: [begins with]

## Vacant Positions

All entries where the user intends to have FTE added or removed from the total FTE count must be entered in the Vacant Position section (i.e. vacant positions, graduate assistant positions, negative positions). Entries without FTE are entered in Other Budget Adjustment section. All vacant position section entries must contain a valid HRS job code with a full-time base amount that falls within the minimum and maximum of that job code range in HRS.

- a. Only enter “FA/LI/AS”, “Grad Asst”, and “Univ Staff”. (Student Help and LTE amounts will be entered in the Other Budget Adjustments section.)
- b. Click the “+” button on the right side of the table to add a new row. Click the “-” button to delete a row.

*Adj Type	Position Number	*Job Code	Title	Pay Basis	FTE	*Fund	Deptid	*Prog	Project	Full-Time Base	Budgeted Amount	Description
1 FA/LI/AS	<input type="text"/>	<input type="text" value="41060"/>	<input type="text" value="SCI MGMT SUPERVISOR"/>	<input type="text" value="A"/>	<input type="text" value="1.000000"/>	<input type="text" value="233"/>	<input type="text" value="531200"/>	<input type="text" value="4"/>	<input type="text"/>	\$75,000.000	\$75,000.000	Replacing T. Funke
2 Grad Asst	<input type="text"/>	<input type="text" value="Y42NN"/>	<input type="text" value="PROGRAM ASST-REG"/>	<input type="text" value="A"/>	<input type="text" value="5.000000"/>	<input type="text" value="233"/>	<input type="text" value="531200"/>	<input type="text" value="4"/>	<input type="text"/>	\$40,000.000	\$200,000.000	Graduate Assistants
3 FA/LI/AS	<input type="text"/>	<input type="text" value="Z99NN"/>	<input type="text" value="ACADEMIC STAFF"/>	<input type="text" value="A"/>	<input type="text" value="-1.000000"/>	<input type="text" value="101"/>	<input type="text" value="531200"/>	<input type="text" value="4"/>	<input type="text"/>	\$100,000.000	\$-100,000.000	Balancing Entry

- c. Enter Vacant Position information. The table on page 5 summarizes the different fields.
  - i. Fields with a magnifying glass icon  indicate that it is possible to search for values. Click the magnifying glass icon to bring up the search window.

*Adj Type	Position Number	*Job Code	Title	Pay Basis	FTE	*Fund	Deptid	*Prog	Project	Full-Time Base	Budgeted Amount	Description
1 FA/LI/AS	<input type="text"/>	<input type="text" value="41060"/>	<input type="text" value="SCI MGMT SUPERVISOR"/>	<input type="text" value="A"/>	<input type="text" value="1.000000"/>	<input type="text" value="233"/>	<input type="text" value="531200"/>	<input type="text" value="4"/>	<input type="text"/>	\$75,000.000	\$75,000.000	Replacing T. Funke
2 Grad Asst	<input type="text"/>	<input type="text" value="Y42NN"/>	<input type="text" value="PROGRAM ASST-REG"/>	<input type="text" value="A"/>	<input type="text" value="5.000000"/>	<input type="text" value="233"/>	<input type="text" value="531200"/>	<input type="text" value="4"/>	<input type="text"/>	\$40,000.000	\$200,000.000	Graduate Assistants
3 FA/LI/AS	<input type="text"/>	<input type="text" value="Z99NN"/>	<input type="text" value="ACADEMIC STAFF"/>	<input type="text" value="A"/>	<input type="text" value="-1.000000"/>	<input type="text" value="101"/>	<input type="text" value="531200"/>	<input type="text" value="4"/>	<input type="text"/>	\$100,000.000	\$-100,000.000	Balancing Entry

- ii. Note that if a vacant position is split funded, it will require one row for each funding string. If the position is split funded with a different Funding Department, the other split will need to be entered on a separate AAP.

Table 1: Vacant Position Field Descriptions		
Field Name	Entry Method	Description
<b>ADJ TYPE</b>	User-entered (drop down available)	The adjustment type for the vacant position. This is used to categorize the position for budget summary and Redbook reporting purposes. Only enter "FA/LI/AS", "Grad Asst", and "Univ Staff".
<b>POSITION NUMBER</b>	User-entered (search available)	<i>Note:</i> This field is not used for UWMSN and should be left blank
<b>JOB CODE</b>	User-entered (search available)	The job code for the vacant position. This is a mandatory field for vacant positions.
<b>TITLE</b>	Auto-populated	The job title for the vacant position. This field is automatically populated based on the job code selected.
<b>PAY BASIS</b>	User-entered (search available)	The pay basis for the vacant position.
<b>FTE</b>	User-entered	The total FTE for the vacant position(s).
<b>FUND</b>	User-entered (search available)	The fund code for the vacant position.
<b>DEPTID</b>	Auto-populated	The department ID for the Funding Department for the vacant position. All adjustments made on the same page will have the same Funding Department, so this value will be defaulted.
<b>PROGRAM</b>	User-entered (search available)	The program code for the vacant position.
<b>PROJECT</b>	User-entered	The project ID for the vacant position. <i>Note:</i> This field is optional. If a project is entered, it must pass SFS edits and be valid at the start of the new fiscal year.
<b>FULL TIME BASE</b>	Auto-calculated	The annual base salary for the vacant position, as if 1 FTE. If a new budgeted amount is entered, the full time base will recalculate based on the formula (budgeted amount / FTE). This amount must fall within the HRS minimum and maximum combrates for the job code selected.
<b>BUDGETED AMOUNT</b>	User-entered	The budgeted amount for the vacant position(s), adjusted for FTE.
<b>DESCRIPTION</b>	User-entered	This field can be used for a variety of notes to describe the position. <i>Note:</i> This field is optional but may be useful to differentiate between similar vacant positions.

## Other Budget Adjustments

No entries within the Other Budget Adjustment section can contain any FTE. Only enter lump adjustments in this section. (i.e lump sum and deduct entries in the previous system). Student Help and LTE entries must always be made in this section.

Click the “+” button on the right side of the table to add a new row. Click the “-” button to delete a row.

Other Budget Adjustments									
*Adj Type	FTE	*Fund	Deptid	*Prog	Project	Full-Time Base	Budgeted Amount	Description	
1 Student Help	0.000000	233	531200	4			\$45,000.000	Supt Staff	+ -
2 Univ Staff	0.000000	233	531200	4			\$15,000.000	Overtime	+ -


- a. Enter the other budget adjustments information. The table below outlines the different fields.
  - iii. Fields with a magnifying glass icon  indicate that it is possible to search for values. Click the magnifying glass icon to bring up the search window.

Table 2: Budget Adjustment Field Descriptions		
Field Name	Entry Method	Description
ADJ TYPE	User-entered (drop down available)	The adjustment type for any other budget adjustment (can be FA/LI/AS with no FTE associated, student help, or LTE).
FTE	User-entered	This value must always be 0 on the Other Budget Adjustments Section.
FUND	User-entered (search available)	The fund code for the other budget adjustment.
DEPTID	Auto-populated	The department ID for the Funding Department for the other budget adjustment. All adjustments made on the same page will have the same Funding Department.
PROGRAM	User-entered (search available)	The program code for the other budget adjustment.
PROJECT	User-entered	The project ID for the vacant position. <i>Note:</i> This field is optional. If a project is entered, it must pass SFS edits and be valid at the start of the new fiscal year.
FULL TIME BASE	User-entered/ auto-calculated	This field will be blanked out for Other Budget Adjustments section.

<b>BUDGETED AMOUNT</b>	User-entered/ auto-calculated	The budgeted amount for the other budget adjustment. This value can be negative if necessary.
<b>DESCRIPTION</b>	User-entered	This field can be used for a variety of notes. It may be helpful to note whether the adjustment is for Overtime, Balancing, etc. <i>Note:</i> This field is optional.