# Chapter 10: Budget Projections

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Introduction

Budget projections allow you to analyze your District’s current salary and benefits cost, and project future costs. The selection criteria for a projection can be defined broadly or in great detail. You can:

- Project the cost of a single percentage increase for all employees.
- Project the cost of a varied pattern of salary increases for different groups of employees.
- Project costs by account subsets.

There are three projection programs:

- **Salary Projection Report** (PPS302) - Projects salaries for selected employees and open positions.
- **Benefits Projection Report** (PPS400) - Projects benefits for selected employees and open positions.
- **Projection Scattergram Report** (PPS200) - Projects salary and benefit costs by Salary Schedule Step/Range.

Before running budget projections, you should:

1. Set up the Personnel System and complete the required Employee Maintenance (PP0002) Screens for each employee. (See the Personnel System Manual for details.)
2. Set up your financial accounting information so that you can distribute costs to the proper accounts. (See the Core Financial Manuals for details.)
3. Define the Master Files used for Position Control as described in Chapter 5 of this manual.
4. Create the Work Calendars and Benefits Tables for the Salary Schedules to which positions will be assigned as described in Chapter 6 and Chapter 7 of this manual.
5. Create the Salary Schedules to which positions will be assigned as described in Chapter 7 of this manual.
6. Define the positions to which employees will be assigned as described in Chapter 8 of this manual.
7. Assign employees to authorized positions as described in Chapter 9 of this manual.
**Salary Projection Report (PPS302)**

**Introduction**

Use the Salary Projection Report to project salary costs for all employees or selected employees. The projection can be defined broadly or in great detail.

The selection criteria screens will vary depending on the options you select. Only the first and last screens (Figure 10-1 and Figure 10-8) are required to launch a report; all other screens are optional. Optional screens allow you to narrow the projection on the basis of specific bargaining units, salary schedules, accounts, locations, and a variety of PER/PAY Master File codes.

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**Figure 10-1: First Screen**
See page 10-4.

**Figure 10-2: First Screen with Bargaining Units**
See page 10-7.

**Figure 10-3: First Screen with Salary Schedules**
See page 10-9.

**Figure 10-4: Additional Selection Screen**
See page 10-11.

**Figure 10-5: Additional Selection Screen with Bargaining Units**
See page 10-11.

**Figure 10-6: Additional Selection Screen with Salary Schedules**
See page 10-11.

**Figure 10-7: Account Subset Screen**
See page 10-18.

**Figure 10-8: Launch Screen**
See page 10-15.
Finding the Salary Projection Report

Look for a menu selection that reads something like "Salary Projections" or "Salary Calculations & Report." Highlight the selection and press <ENTER>. The first Salary Projection Screen will be displayed (Figure 10-9).

The Menu System Screens are user-defined and will vary from site-to-site. Ask your system administrator for help if you can't find the "Salary Projections" menu selection.

First Screen: Salary Projections

Complete the required fields, and press <ENTER>. The lower portion of this screen will display additional fields if the Selection field is B (see Figure 10-10) or S (see Figure 10-11).

Projection for year (R)  Type the two-digit number for the ‘Target’ or ‘Project FOR’ year. For example, 04 for 2004.

You must create at least one Work Calendar for the year to which you want to project. See Chapter 6 in this manual for instructions.

You must create the district account structure for the year to which you want to project using Update District Master File (GLMT02). See Chapter 4 of the QSS/OASIS Core Financial Manual for details on GLMT02.

Use schedules for year (R)  Type the two-digit number for the ‘Source’ or ‘Project FROM’ year. The projection will use the Salary Schedules from this year.
Use employee records year (R)  
Type the two-digit year that tells the program which year's employee data is to be used to calculate the projection.

If a position is unfilled, the position data rather than the employee data will be used.

Do step advancement (R)  
This effects all selected employees.

Y = Project all scheduled advances for the selected employees.
N = Do not project step advances.

Selection (R)  
This is the first field that determines who will be included in the projection.

A = All Schedules - Include all employees and open positions.
B = Bargaining Units - Select specific bargaining units.

Additional fields will display when you press <ENTER> (see page 10-7 for instructions).

When selecting by Bargaining Unit, be aware that the system will report all employees on the Salary Schedules to which the selected Bargaining Units are attached, not the Employees to which the Bargaining Units are attached on their MA screen.

S = Salary Schedules - Select specific salary schedules.

Additional fields will display when you press <ENTER> (see page 10-9 for instructions).

Percentage (O)  
If you entered A in the Selection field, you can type a percentage (in 999.9999 format) to apply an across-the-board annual increase to all salary schedules. Use a minus sign '-' to project a decrease. For example, to project a decrease of five percent, enter -5.0000.

Additional Selection (R)  
This field determines whether you will use the Additional Selection Screen (Figure 10-15) to narrow your selection criteria.

Y = Yes - Use the Additional Selection Screen.
N = No - Do not use the Additional Selection Screen.

Specifically, you will be able to select employees and open positions based on:

- Job Codes
- Work Locations
- Pay Schedules
- Report Codes
- Job Category
- Work Calendars
- Bargaining Units
- Employee Types
<Start Over> Returns the cursor to the initial field.

<Retrieve Presets> Retrieve a previously-defined report setting.

See the appendix *Preset Maintenance* for details about <Retrieve Preset> and <Save Preset>.

<Previous Screen> No effect on this screen.

<Next Screen> Takes you to the Additional Selection Screen or Report Launch Screen.

<Return to Menu> Returns to your Menu System.
First Screen with Bargaining Units

Use this screen to limit the number of selected employees to specific Bargaining Units. Only employees on the Salary Schedules to which these Bargaining Units are attached will be selected. You also have the option to specify a percentage amount of annual increase or decrease for each unit.

When you use this screen, the program changes from ‘give them everything’ to ‘give them only what they ask for’ mode. This is to say, when you do not use this screen, all Bargaining Units are selected. When you do use this screen, only the Bargaining Units you specify are selected. Therefore, you must enter at least one Bargaining Unit. If you leave all Bargaining Unit fields blank on this screen, no records will be selected.

The Barg Unit and %Proj fields display after you enter B in the Select field on the first screen, and press <ENTER>.

Figure 10-10: First Screen with Bargaining Units

**Barg Unit (O)**
Type the two-digit code for each Bargaining Unit you want to select. Only the employees on the Salary Schedules to which these Bargaining Units are attached will be selected. You must enter at least one code.

Bargaining Unit codes are defined in PER/PAY Master Files (PP0010). See Chapter 5 in this manual for details.
% Proj (O)  Type a percentage (in 999.9999 format) to apply an annual increase for the Bargaining Unit. Use a minus sign ‘-’ to project a decrease. For example, enter \(-5.0000\) to project a decrease of five percent.

Complete the screen and press <ENTER>. Then press <Next Screen> to continue.
First Screen with Salary Schedules

Use this screen to limit the projection to specific Salary Schedules. Only employees that use the specified Salary Schedules will be selected. You also have the option to specify the percentage amount of annual increase or decrease for each selection.

When you use this screen, the program changes from ‘give them everything’ to ‘give them only what they ask for’ mode. This is to say, when you do not use this screen, all Salary Schedules are selected. When you use this screen, only the Salary Schedules you specify are selected. Therefore, you must enter at least one Salary Schedule. If you leave all Salary Schedule fields blank on this screen, no records will be selected.

The Schedule and %Proj fields display after you enter S in the Select field on the first screen, and press <ENTER>.

Figure 10-11: First Screen with Salary Schedules

**Schedule (O)**

Type the two-digit Schedule Number in the first box of the Schedule field, to the left of the ‘-‘. Enter at least one Schedule Number.

Type the two-digit Model Number in the second box of the Schedule field, to the right of the ‘-‘.

Models are variations of a Salary Schedule. Model ‘00’ is always the ‘live’ production version, while Models ‘01’ through ‘99’ can be used for projecting proposed changes to the ‘00’ Model. (See Chapter 7 in this manual for more information about Salary Schedules.)
% Proj (O)  Type a percentage (in 99.9999 format) to apply an annual increase for the Salary Schedule. Use a minus sign '-' to project a decrease. For example, enter -5.0000 to project a decrease of five percent.

Complete the screen and press <ENTER>. Then press <Next Screen> to continue.
Additional Selection Screen

Use this screen to limit the number of employees and open positions selected on the basis of Master File codes. Specifically, you can select records based on:

- Job Codes
- Work Locations
- Pay Schedules
- Report Codes
- Job Category
- Work Calendars
- Bargaining Units
- Employee Types

You may want to print Master File Reports to see a listing of the valid Master File codes. See Chapter 5 of this manual for instructions.

The Additional Selection Screen appears when you enter Y in the Additional Selection field on the first screen and press < ENTER>.

If you also entered B (Bargaining Unit) or S (Salary Schedule) in the Selection field on the first screen, more fields will display in the upper portion of the Additional Selection Screen (Figure 10-13 and Figure 10-14).

The Bargaining Unit fields in the upper portion of this screen are display-only. If you want to edit them, return to the previous screen. See page 10-7 for details about Bargaining Unit fields.

The Salary Schedule fields in the upper portion of this screen are display-only. If you want to edit them, return to the previous screen. See page 10-9 for details about Salary Schedule fields.
Once you enter a code, the program changes from ‘give them everything’ to ‘give them only what they ask for’ mode. For example, if you enter only one Job Code, then only employees with that code will be selected. If you leave all Job Code fields blank, then employees with any Job Code will be selected.

**Job Codes** (O)  
Type the six-digit number for the Job Codes you want to select. Select up to 10 different Job Codes. Only the employees with positions containing these codes will be selected.

Leave all Job Code fields blank to select ALL Job Codes.

Job Codes are defined with PER/PAY Master Files (PP0010). See Chapter 5 in this manual for details.

**Job Categories** (O)  
Type the four-digit number for the Job Categories you want to select. Select up to 10 different Job Categories. Only the employees with positions containing these categories will be selected.

Leave all Job Category fields blank to select ALL Job Categories.

Job Categories are defined in PER/PAY Master Files (PP0010). See Chapter 5 in this manual for details.
**Work Locations (O)**  
Type the four-digit number for the Work Locations you want to select. Select up to 10 different Work Locations. Only the employees with positions assigned to these locations will be selected.  

Leave all Work Location fields blank to select ALL Work Locations.  

Work Locations are defined in the Location Master File (LOUPDT). See Chapter 5 in this manual for details.

**Work Calendars (O)**  
Type the four-digit number for the Work Calendars you want to select. Select up to 10 different Work Calendars. Only the employees with positions attached to these calendars will be selected.  

Leave all Work Calendar fields blank to select ALL Work Calendars.  

Work Calendars are defined in Work Calendar Maintenance (PP0035). See Chapter 6 in this manual for details.

**Pay Schedules (O)**  
Type up to six characters for the Pay Schedules you want to select. Select up to 10 different Pay Schedules. Only employees with positions assigned to these Pay Schedules will be selected.  

Leave all Pay Schedule fields blank to select ALL schedules.  

Pay Schedules are defined in PER/PAY Master Files (PP0010). See the *QSS/OASIS Enhanced Payroll Manual* for details.

**Bargaining Units (O)**  
Type the two-digit number for the Bargaining Units you want to select. Select up to 10 different Bargaining Units. Only employees assigned to these units on their MA screen will be selected.  

Leave all Bargaining Unit fields blank to select ALL Bargaining Units.  

Bargaining Units are defined in the PER/PAY Master Files (PP0010). See Chapter 5 in this manual for details.

**Report Codes (O)**  
Type the two-digit number for the Report Codes you want to select. Select up to 10 different Report Codes. Only employees with these codes on their MA screen will be selected.  

Leave all Report Code fields blank to select ALL Report Codes.  

Report Codes are defined in the PER/PAY Master Files (PP0010). See the *QSS/OASIS Personnel Manual* for details.
**Employee Type (O)**  Type the two-character code for the Employee Types you want to select. Select up to 10 different Employee Types. Only employees with these types on their MA screen will be selected.

Leave all Employee Type fields blank to select ALL Employee Types.

Employee Types are defined in the PER/PAY Master Files (PP0010). See the *QSS/OASIS Personnel Manual* for details.

- **<Start Over>** Takes you back to the first screen.
- **<Previous Screen>** Takes you back to the first screen.
- **<Next Screen>** Takes you to the Report Launch Screen.
- **<Return to Menu>** Returns you to your site Menu System.

Complete the screen and press <ENTER>. Then press <Next Screen> to continue to the Report Launch Screen.
Report Launch Screen

Use this screen to complete your selection criteria.

Use this screen to complete your selection criteria.

You can also go to the Accounts Subset Screen from here by entering \( Y \) in the ‘Select a subset of your accounts?’ field. The Accounts Subset Screen allows you to further limit your projection on the basis of financial accounts, and is described in the next section (see page 10-18).

![Figure 10-16: Salary Projection Report Launch Screen](image)

**Report Title** (O)  
Type up to 30 characters for the title you want to appear in the report heading.

You may want to include your name and extension number to facilitate routing after printing.

**Select a subset of your accounts?** (R)  
This field determines whether you will use the Accounts Subset Screen.

\[
\begin{align*}
Y &= \text{Yes. Select specific financial accounts.} \\
N &= \text{No. Do not limit the projection by accounts.}
\end{align*}
\]

If you type \( Y \), the Accounts Subset Screen will display when you press <ENTER>. 

---

07/10  
Copyright © QSS, 2010  
10-15
Total FTE for positions active on (R)

Include the total FTE for all Authorized Positions that will be active on this date.

The date must be within the fiscal year you entered in the Projection for year field on the first screen.

Select this date carefully. If you select 07/01/yy, for example, there may be no teachers included on the report since their positions do not become effective until August.

Exclude open positions prior to (O)

Do not include any positions that were open prior to this date. If you leave this blank, all open positions will be included.

The date must be within the fiscal year you entered in the Projection for year field on the first screen.

Report type (R)

The report sort sequence:

1 = Sort by the Sort sequence, and then by the abbreviated Employee Name.
2 = Sort first by the Sort sequence, then by the Account, and finally by the abbreviated Employee Name.
3 = Sort by the Sort sequence, and then by the full Employee Name.
4 = Sort first by the Sort sequence, then by the Account, and finally by the full Employee Name.

SSN masking (O)

Select how you wish to mask the employee SSN:

N = Name only; no SSN
P = Position name only; no employee name
Number of digits to replace with ‘0’
0 = Mask no digits
1 - 9 = Mask the number of digits indicated
L/R = Left or right justify the External Reference Number

Sort sequence (O)

Use the two-character account field definitions listed in ‘Choose from these Sort Items’ to set up how the report should be sorted.

Page break by (O)

Indicate the account field included in the Sort sequence which should start a new page whenever it changes.

Choose from these Sort Items (D)

The two-character abbreviations and names of your account fields which display on the screen. These are user-defined and will vary from site-to-site.
There are also four system-defined codes which can be used in the Sort sequence.

$1 = $2 = $3 = $4 = Sort by Work Location  Sort by Job Code  Sort by Job Category  Sort by Pay Schedule

**Optional Selection**

**Bonus (H=Has, D=Doesn’t (O))**

Indicate with an H to include employees who have the selected bonus types, or with a D to include employees who do not have the selected bonus types.

Leave blank to include all employees regardless of the bonus types that they have or do not have.

**SSN (O)**

Type up to five employee SSNs to limit the report to only those individuals.

Leave blank to include all employees who meet the other report selection options.

<Tab><Start Over> Takes you to the first screen.

<Tab><Save Presets> When you press <ENTER>, if there are no error messages and you have not requested to select a subset of your accounts, the <Save Presets> function key is displayed. Presets allow you to save your current report settings for later retrieval.

<Tab><Previous Screen> Takes you to the previous screen.

<Tab><Next Screen> No effect on this screen.

<Tab><Launch Job> When you press <ENTER>, if there are no error messages and you have not requested to select a subset of your accounts, the <Launch Job> function key is displayed. Press <Launch Job> to create the Salary Projection Report.

<Tab><Return to Menu> Returns to your Menu System.

Complete the screen and press <ENTER>. If you entered Y in the ‘Select a subset of your accounts?’ field, the Account Subsets Screen will be displayed. If you are not using the Account Subsets Screen, press the <Launch Job> function key to create the Salary Projection Report.
**Accounts Subset Screen**

Use this screen to limit the number of records to specific Payroll Labor Accounts. Only employees/positions paid from the specified accounts will be selected. You can enter up to 10 different account masks or a series of Field and Range combinations.

Once you enter an account code mask, the program changes from "give them everything" to "give them only what they ask for" mode. For example, if you enter only one valid account number, then only employees paid from that account will be selected. If you leave all account field masks blank, then records from all accounts will be selected.

The Accounts Subset Screen displays when you enter Y in the ‘Select a subset of your accounts?’ field on the Report Launch Screen, and press <ENTER>.

![Accounts Subset Screen](image)

*Figure 10-17: Accounts Subset Screen*

**[title row]** (O) The title row lists the names of the fields in the financial account.

This sample is for illustration only. The screen will show the account structure for your district.
There are 10 lines. Leave all lines blank, or type up to 10 account masks.

Leave all 10 lines blank to select all accounts.

If you enter account masks on one or more lines, only those lines will be used. (Other accounts may still be selected based on ranges of field values.)

To select accounts based on account masks, type up to 10 account masks. To make filling in account masks easier, press <ENTER> to fill all 10 rows with question marks. Then fill in the masks you need.

The example above illustrates how account masking works. Each question mark (?) is a wildcard that stands for one digit or letter.

**LINE** ACCOUNTS SELECTED


[2] All accounts that contain Goal (Program goal) 5864.

[3] All accounts for Fd 10 and Objt (Object) 4?? (4000-4999). (If your state uses letters and numbers in accounts, 4?? matches the numeral 4 followed by any 3 letters or numbers.)


In this example, an account is included in the transfer if it matches any one of the masks in lines [1] through [4].
The **Field** and **Range** fields are for entering field value ranges.

**Field (O)** Leave blank, or type the 2-letter abbreviation for a field value.

**Range (O)** If **Field** contains a value, enter the beginning and ending value for the range.

<table>
<thead>
<tr>
<th>Field</th>
<th>Range</th>
</tr>
</thead>
<tbody>
<tr>
<td>O</td>
<td>8500 - 8549</td>
</tr>
</tbody>
</table>

In the example above, accounts with objects from 8500 to 8549 would be selected.

Complete the screen and press <ENTER>. Then press <Launch Job>. 
Sample Salary Projection Report (PPS302)

The PPS302 report is produced by the Enhanced Position Control System.

The cover page for PPS302 is shown below.

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</thead>
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</tr>
<tr>
<td>Schedule Year : 05</td>
</tr>
<tr>
<td>Employee Year : 05</td>
</tr>
<tr>
<td>Allow Step Changes : NO</td>
</tr>
<tr>
<td>Report Type : ALL SCHEDULES</td>
</tr>
<tr>
<td>Global Projections : 3.0000%</td>
</tr>
<tr>
<td>Job Codes :</td>
</tr>
<tr>
<td>Job Categories :</td>
</tr>
<tr>
<td>Work Locations :</td>
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<td>Pay Schedules :</td>
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<tr>
<td>Page Breaks on : NONE</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Account classifications selected</th>
<th>Field ranges selected</th>
</tr>
</thead>
<tbody>
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<td>Fnd Resc Y Objt SO Goal Func CstCtr Ste Mngr</td>
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<tr>
<td>1. - - - - - - - - - -</td>
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</tr>
<tr>
<td>2. - - - - - - - - - -</td>
<td></td>
</tr>
<tr>
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<tr>
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<td>8. - - - - - - - - - -</td>
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<td>9. - - - - - - - - - -</td>
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<td>10. - - - - - - - - - -</td>
<td></td>
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FTE COUNTED ON: 05/24/2005
The body pages for the PPS302 report.

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<th>NAME</th>
<th>POS-#</th>
<th>FTE</th>
<th>PLACEMENT</th>
<th>WCAL</th>
<th>%POSN</th>
<th>%ACCT</th>
<th>AC-FTE</th>
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<td>0.0625</td>
<td>070103/063004*</td>
<td>1828.00</td>
<td>.00</td>
<td>1828.00</td>
</tr>
<tr>
<td>000-00-0000</td>
<td>PAN PETER</td>
<td>640066</td>
<td>1.0000</td>
<td>01-0005-05</td>
<td>0101</td>
<td>100.00</td>
<td>71.43</td>
<td>0.7143</td>
<td>070103/063004</td>
<td>31674.20</td>
<td>44342.50</td>
<td>76016.70</td>
</tr>
<tr>
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<td>640066</td>
<td>1.0000</td>
<td>01-0005-05</td>
<td>0101</td>
<td>100.00</td>
<td>28.57</td>
<td>0.2857</td>
<td>070103/063004</td>
<td>12668.80</td>
<td>44342.50</td>
<td>57011.30</td>
</tr>
<tr>
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<td>040006</td>
<td>0.5000</td>
<td>02-0007-03</td>
<td>0200</td>
<td>100.00</td>
<td>100.00</td>
<td>0.0000</td>
<td>070103/063004</td>
<td>16950.00</td>
<td>.00</td>
<td>16950.00</td>
</tr>
<tr>
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<td>040010</td>
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<td>02-0007-04</td>
<td>0200</td>
<td>100.00</td>
<td>100.00</td>
<td>1.0000</td>
<td>080103/063004</td>
<td>32446.00</td>
<td>.00</td>
<td>32446.00</td>
</tr>
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<td>000086</td>
<td>1.0000</td>
<td>17-0001-01</td>
<td>0000</td>
<td>100.00</td>
<td>100.00</td>
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<td>070103/063004</td>
<td>1863.00</td>
<td>.00</td>
<td>1863.00</td>
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<td>ASST SUPT - HUMAN</td>
<td>040003</td>
<td>1.0000</td>
<td>03-B   -04</td>
<td>0100</td>
<td>100.00</td>
<td>100.00</td>
<td>1.0000</td>
<td>010504/063004*</td>
<td>46328.00</td>
<td>.00</td>
<td>46328.00</td>
</tr>
<tr>
<td>000-00-0000</td>
<td>RABBIT PETER</td>
<td>640186</td>
<td>1.0000</td>
<td>02-0007-06</td>
<td>0200</td>
<td>100.00</td>
<td>100.00</td>
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</tr>
<tr>
<td>000-00-0000</td>
<td>SIMPSON BART</td>
<td>010068</td>
<td>0.6000</td>
<td>07-F   -08</td>
<td>0102</td>
<td>100.00</td>
<td>33.33</td>
<td>0.2000</td>
<td>010104/063004</td>
<td>7928.17</td>
<td>374.00</td>
<td>8292.17</td>
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<table>
<thead>
<tr>
<th>AC-FTE</th>
<th>BASE</th>
<th>ADDTL</th>
<th>TOTAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>177.4887</td>
<td>8,723,667.29</td>
<td>222,912.37</td>
<td>8,946,579.66</td>
</tr>
</tbody>
</table>
Benefits Projection Report (PPS400)

Introduction

Use the Benefits Projection Report to project benefits costs for all employees or selected employees. The projection can be defined broadly or in great detail.

The selection criteria screens will vary depending on the options you select. Only the first and last screens (Figure 10-18 and Figure 10-25) are required to launch a report; all other screens are optional. Optional screens allow you to narrow the projection on the basis of specific bargaining units, salary schedules, accounts, locations, and a variety of PER/PAY Master File codes.

See page 10-24.

See page 10-27.

See page 10-29.

See page 10-31.
Finding the Benefits Projection Report

Look for a menu selection that reads something like "Benefits Projections" or "Benefits Calculations & Report." Highlight the selection and press <ENTER>. The first Benefits Projection Screen will be displayed (Figure 10-26).

The Menu System Screens are user-defined and will vary from site-to-site. Ask your system administrator for help if you can't find the "Benefits Projections" menu selection.

First Screen: Benefits Projections

Complete the required fields, and press <ENTER>. The lower portion of this screen will display additional fields if the Selection field is B (see Figure 10-27) or S (see Figure 10-28).

![Figure 10-26: First Benefits Projection Report Screen](image-url)
Benefits Projection Report (PPS400)  
First Screen: Benefits Projections

**Projection for year (R)**  
Type the two-digit number for the ‘Target’ or ‘Project FOR’ year. For example, 04 for 2004.

⚠️ You must create at least one Work Calendar for the year to which you want to project. See Chapter 6 in this manual for instructions.

⚠️ You must create the district account structure for the year to which you want to project using Update District Master File (GLMT02). See Chapter 4 of the QSS/OASIS Core Financial Manual for details on GLMT02.

**Use schedules for year (R)**  
Type the two-digit number for the ‘Source’ or ‘Project FROM’ year. The projection will use the Salary Schedules from this year.

**Use employee records year (R)**  
Type the two-digit year that tells the program which year’s employee data is to be used to calculate the projection.

If a position is unfilled, the position data rather than the employee data will be used.

**Do step advancement (R)**  
This effects all selected employees.

\[ \text{Y} = \text{Project all scheduled advances for the selected employees.} \]

\[ \text{N} = \text{Do not project step advances.} \]

**Selection (R)**  
This is the first field that determines who will be included in the projection.

\[ \text{A} = \text{All Schedules - Include all employees and open positions.} \]

\[ \text{B} = \text{Bargaining Units - Select specific bargaining units.} \]

Additional fields will display when you press <ENTER> (see page 10-29 for instructions).

When selecting by Bargaining Unit, be aware that the system will report all employees on the Salary Schedules to which the selected Bargaining Units are attached, not the Employees to which the Bargaining Units are attached on their MA screen.

\[ \text{S} = \text{Salary Schedules - Select specific salary schedules.} \]

Additional fields will display when you press <ENTER> (see page 10-29 for instructions).
Percentage (O)  If you entered A in the Selection field, you can type a percentage (in 999.9999 format) to apply an across-the-board annual increase to all salary schedules. Use a minus sign ‘-’ to project a decrease. For example, to project a decrease of five percent, enter -5.0000.

Additional Selection (R)  This field determines whether you will use the Additional Selection Screen (Figure 10-32) to narrow your selection criteria.

\[
\begin{array}{ll}
Y & = \text{Yes - Use the Additional Selection Screen.} \\
N & = \text{No - Do not use the Additional Selection Screen.}
\end{array}
\]

Specifically, you will be able to select employees and open positions based on:

- Job Codes
- Work Locations
- Pay Schedules
- Report Codes
- Job Category
- Work Calendars
- Bargaining Units
- Employee Types

<Start Over> No effect on this screen.

<Retrieve Presets> Retrieve a previously-defined report setting.

See the appendix Preset Maintenance for details about <Retrieve Preset> and <Save Preset>.

<Previous Screen> No effect on this screen.

<Next Screen> Takes you to the Additional Selection Screen or Report Launch Screen.

<Return to Menu> Returns to your Menu System.
**First Screen with Bargaining Units**

Use this screen to limit the number of selected employees to specific Bargaining Units. Only employees on the Salary Schedules to which these Bargaining Units are attached will be selected. You also have the option to specify the percentage amount of annual increase or decrease for each unit.

When you use this screen, the program changes from 'give them everything' to 'give them only what they ask for' mode. This is to say, when you do *not* use this screen, all Bargaining Units attached to Salary Schedules are selected.

When you *do* use this screen, only those Salary Schedules attached to the Bargaining Units you specify are selected. Therefore, you must enter at least one Bargaining Unit. If you leave all Bargaining Unit fields blank on this screen, no records will be selected.

The **Barg Unit** and **%Proj** fields display after you enter **B** in the **Select** field on the first screen, and press <ENTER>.

---

**Figure 10-27: First Screen with Bargaining Units**
Barg Unit (O)  Type the two-digit code for each Bargaining Unit you want to select. Only the employees on the Salary Schedules to which these Bargaining Units are attached will be selected. You must enter at least one code.

Bargaining Unit codes are defined in PER/PAY Master Files (PP0010). See Chapter 5 in this manual for details.

% Proj (O)  Type a percentage (in 999.9999 format) to apply an annual increase for the Bargaining Unit. Use a minus sign ‘-’ to project a decrease. For example, enter -5.0000 to project a decrease of five percent.

Complete the screen and press <ENTER>. Then press <Next Screen> to continue.
First Screen with Salary Schedules

Use this screen to limit the projection to specific Salary Schedules. Only employees that use the specified Salary Schedules will be selected. You also have the option to specify the percentage amount of annual increase or decrease for each selection.

When you use this screen, the program changes from ‘give them everything’ to ‘give them only what they ask for’ mode. This is to say, when you do not use this screen, all Salary Schedules are selected. When you use this screen, only the Salary Schedules you specify are selected. Therefore, you must enter at least one Salary Schedule. If you leave all Salary Schedule fields blank on this screen, no records will be selected.

The Schedule and %Proj fields display after you enter S in the Select field on the first screen, and press <ENTER>.

Figure 10-28: First Screen with Salary Schedules

Schedule (O) Type the two-digit Schedule Number in the first box of the Schedule field, to the left of the ‘-’. Enter at least one Schedule Number.

Type the two-digit Model Number in the second box of the Schedule field, to the right of the ‘-’.

Models are variations of a Salary Schedule. Model ‘00’ is always the ‘live’ production version, while Models ‘01’ through ‘99’ can be used for projecting proposed changes to the ‘00’ Model. (See Chapter 7 in this manual for more about Salary Schedules.)
% Proj (O)  

Type a percentage (in 99.9999 format) to apply an annual increase for the Salary Schedule. Use a minus sign '-' to project a decrease. For example, enter \(-5.0000\) to project a decrease of five percent.

Complete the screen and press <ENTER>. Then press <Next Screen> to continue.
Additional Selection Screen

Use this screen to limit the number of employees and open positions selected on the basis of Master File codes. Specifically, you can select records based on:

- Job Codes
- Work Locations
- Pay Schedules
- Report Codes
- Job Category
- Work Calendars
- Bargaining Units
- Employee Types

You may want to print Master File Reports to see a listing of the valid Master File codes. See Chapter 5 of this manual for instructions.

The Additional Selection Screen appears when you enter Y in the Additional Selection field on the first screen and press < ENTER>.

If you also entered B (Bargaining Unit) or S (Salary Schedule) in the Selection field on the first screen, more fields will display in the upper portion of the Additional Selection Screen (Figure 10-30 and Figure 10-31).

The Bargaining Unit fields in the upper portion of this screen are display-only. If you want to edit them, return to the previous screen. See page 10-27 for details about Bargaining Unit fields.

The Salary Schedule fields in the upper portion of this screen are display-only. If you want to edit them, return to the previous screen. See page 10-29 for details about Salary Schedule fields.
Once you enter a code, the program changes from ‘give them everything’ to ‘give them only what they ask for’ mode. For example, if you enter only one Job Code, then only employees with that code will be selected. If you leave all Job Code fields blank, then employees with any Job Code will be selected.

![Additional Selection Screen]

**Figure 10-32: Additional Selection Screen**

**Job Codes (O)** Type the six-digit number for the Job Codes you want to select. Select up to 10 different Job Codes. Only employees with positions containing these codes will be selected.

Leave all Job Code fields blank to select ALL Job Codes.

Job Codes are defined with PER/PAY Master Files (PP0010). See Chapter 5 in this manual for details.

**Job Categories (O)** Type the four-digit number for the Job Categories you want to select. Select up to 10 different Job Categories. Only employees with positions containing these categories will be selected.

Leave all Job Category fields blank to select ALL Job Categories.

Job Categories are defined in PER/PAY Master Files (PP0010). See Chapter 5 in this manual for details.
**Work Locations**

Type the four-digit number for the Work Locations you want to select. Select up to 10 different Work Locations. Only employees with positions assigned to these locations will be selected.

Leave all Work Location fields blank to select ALL Work Locations.

Work Locations are defined in the Location Master File (LOUPDT). See *Chapter 5* in this manual for details.

**Work Calendars**

Type the four-digit number for the Work Calendars you want to select. Select up to 10 different Work Calendars. Only employees with positions attached to these calendars will be selected.

Leave all Work Calendar fields blank to select ALL Work Calendars.

Work Calendars are defined in Work Calendar Maintenance (PP0035). See *Chapter 6* in this manual for details.

**Pay Schedules**

Type up to six characters for the Pay Schedules you want to select. Select up to 10 different Pay Schedules. Only employees with positions assigned to these Pay Schedules will be selected.

Leave all Pay Schedule fields blank to select ALL schedules.

Pay Schedules are defined in PER/PAY Master Files (PP0010). See the *QSS/OASIS Enhanced Payroll Manual* for details.

**Bargaining Units**

Type the two-digit number for the Bargaining Units you want to select. Select up to 10 different Bargaining Units. Only employees assigned to these units on their MA screen will be selected.

Leave all Bargaining Unit fields blank to select ALL Bargaining Units.

Bargaining Units are defined in the PER/PAY Master Files (PP0010). See *Chapter 5* in this manual for details.

**Report Codes**

Type the two-digit number for the Report Codes you want to select. Select up to 10 different Report Codes. Only employees assigned to these codes on their MA screens will be selected.

Leave all Report Code fields blank to select ALL Report Codes.

Report Codes are defined in the PER/PAY Master Files (PP0010). See the *QSS/OASIS Personnel Manual* for details.
**Employee Type (O)** Type the two-character code for the Employee Types you want to select. Select up to 10 different Employee Types. Only employees assigned to these types on their MA screen will be selected.

Leave all Employee Type fields blank to select ALL Employee Types.

Employee Types are defined in the PER/PAY Master Files (PP0010). See the *QSS/OASIS Personnel Manual* for details.

<Start Over> Takes you back to the first screen.

<Previous Screen> Takes you back to the first screen.

<Next Screen> Takes you to the Report Launch Screen.

<Return to Menu> Returns you to your site Menu System.

Complete the screen and press <ENTER>. Then press <Next Screen> to continue to the Report Launch Screen.
Report Launch Screen

Use this screen to complete your selection criteria.

You can also go to the Accounts Subset Screen from here by entering Y in the ‘Select a subset of your accounts?’ field. The Accounts Subset Screen allows you to further limit your projection on the basis of financial accounts, and is described in the next section (see page 10-38).

**Figure 10-33: Salary Projection Report Launch Screen**

**Report Title** (O) Type up to 30 characters for the title you want to appear in the report heading.

You may want to include your name and extension number to facilitate routing after printing.

**Report format** (R) The basic format of the report:

\[1\] = Sort by Account.
\[2\] = Sort by Employee Name.

**SSN masking** (O) Select how you wish to mask the employee SSN:

N = Name only; no SSN
P = Position name only; no employee name
Number of digits to replace with ‘0’
0 = Mask no digits
1 - 9 = Mask the number of digits indicated
L/R = Left or right justify the External Reference Number
Select a subset of your accounts? (R)

This field determines whether you will use the Accounts Subset Screen.

Y = Yes. Select specific financial accounts.
N = No. Do not limit the projection by accounts.

If you type Y, the Accounts Subset Screen will display when you press <ENTER>.

Total FTE for positions active on (R)

Include the total FTE for all Authorized Positions that will be active on this date.

The date must be within the fiscal year you entered in the Projection for year field on the first screen.

Select this date carefully. If you select 07/01/yy, for example, there may be no teachers included on the report since their positions do not become effective until August.

Benefit Class For Column (R)

Type the codes for the Benefit Classes you want to include on the report. The Benefit Classes will print on the report in the same order in which you enter them here. The report displays a maximum of two six-item lines.

There are 12 Benefit Classes. The first nine are predefined by QSS. Refer to Volume 3-Chapter 27: Posting Employer-Paid Benefits in the QSS/OASIS Enhanced Payroll Manual for complete details.

Common Benefit Class Numbers are:

01 = Teachers Retirement (STRS)
02 = Classified Employees Retirement (PERS)
03 = OASDI
04 = Health & Welfare Benefits (Voluntary Deductions)
05 = State Unemployment Insurance (SUI)
06 = Worker's Compensation
07 = Teachers Retirement Buyout
08 = Classified Employees Buyout
09 = Medicare
10 = Classified Employees Buyout of Buyout Amount in Class 08 above
11 = Section 125 Cashout
12 = PERS Revenue Limit Reduction (RLR)

Benefit Selection (H: Has/D: Doesn’t) (O)

Indicate with an H to include only employees who have the Benefit Class noted above, or with a D to include only employees who do not have the Benefit Class noted above.
Leave blank to include all employees regardless of the Benefit Classes that they have or do not have.

**Sort sequence (O)** Use the two-character account field definitions listed in ‘Choose from these Sort Items’ to set up how the report should be sorted.

**Page Break by (O)** Indicate the account field included in the Sort sequence which should start a new page whenever it changes.

**Choose from these Sort Items (D)** The two-character abbreviations and names of your account fields display on the screen. These are user-defined and will vary from site-to-site.

**Optional Selection SSN (O)** Type up to five employee SSNs to limit the report to only those individuals.

Leave blank to include all employees who meet the other report selection options.

*<Start Over>* Takes you to the first screen.

*<Save Presets>* When you press <ENTER>, if there are no error messages and you have not requested to select a subset of your accounts, the *<Save Preset>* function key is displayed. Presets allow you to save your current report settings for later retrieval.

*<Previous Screen>* Takes you to the previous screen.

*<Next Screen>* No effect on this screen.

*<Launch Job>* When you press <ENTER>, if there are no error messages and you have not requested to select a subset of your accounts, the *<Launch Job>* function key is displayed. Press *<Launch Job>* to create the Benefit Projection Report.

*<Return to Menu>* Returns to your Menu System.

Complete the screen and press *<ENTER>*. If you entered Y in the ‘**Select a subset of your accounts?**’ field, the Account Subsets Screen will be displayed. If you are not using the Account Subsets Screen, press the *<Launch Job>* function key to create the Benefit Projection Report.
**Accounts Subset Screen**

Use this screen to limit the number of records to specific Payroll Labor Accounts. Only employees/positions paid from the specified accounts will be selected. You can enter up to 10 different account masks or a series of Field and Range combinations.

Once you enter an account code mask, the program changes from "give them everything" to "give them only what they ask for" mode. For example, if you enter only one valid account number, then only employees paid from that account will be selected. If you leave all account field masks blank, then records from all accounts will be selected.

The Accounts Subset Screen displays when you enter Y in the ‘Select a subset of your accounts?’ field on the Report Launch Screen, and press <ENTER>.

---

**Figure 10-34: Accounts Subset Screen**

[tile row] (O) The title row lists the name for the fields in the financial account.

This sample is for illustration only. The screen will show the account structure for your district.
There are 10 lines. Leave all lines blank, or type up to 10 account masks.

Leave all 10 lines blank to select all accounts.

If you enter account masks on one or more lines, only those lines will be used. (Other accounts may be still selected based on ranges of field values.)

To select accounts based on account masks, type up to 10 account masks. To make filling in account masks easier, press <ENTER> to fill all 10 rows with question marks. Then fill in the masks you need.

The example above illustrates how account masking works. Each question mark ( ? ) is a wildcard that stands for one digit or letter.

**ACCOUNTS SELECTED**


[2] All accounts that contain Goal (Program goal) 5864.

[3] All accounts for Fd 10 and Objt (Object) 4??? (4000-4999). (If you state uses letters and numbers in accounts, 4??? matches the numeral 4 followed by any 3 letters or numbers.)


In this example, an account is included in the transfer if it matches any one of the masks in lines [1] through [4].
The **Field** and **Range** fields are for entering field value ranges.

**Field** (O)  Leave blank, or type the 2-letter abbreviation for a field value.

**Range** (O)  If **Field** contains a value, enter the beginning and ending value for the range.

<table>
<thead>
<tr>
<th>Field</th>
<th>Range</th>
</tr>
</thead>
<tbody>
<tr>
<td>8500</td>
<td>8549</td>
</tr>
</tbody>
</table>

In the example above, accounts with objects from 8500 to 8549 would be selected.

Complete the screen and press <ENTER>. Then press <Launch Job>.
Sample Benefit Projection Report (PPS400)

**ENTRY LISTING**

- **PROJECTOR YEAR**: 04
- **SCHEDULE YEAR**: 04
- **EMPLOYEE YEAR**: 04
- **ALLOW STEP CHANGES**: NO
- **REPORT TYPE**: ALL SCHEDULES
- **GLOBAL PROJECTIONS**: 0.0000%

**ACCOUNT CLASSIFICATIONS SELECTED**

- FU RESO P OBJE SCH GOAL FUNC DIST

**JOB CODES:**

**PAGE BREAKS ON:** NONE

---

**ACCTCLASS** | **POS#** | **SCHEDULE** | **START/END** | **TOT BEN** | **STRS** | **PERS** | **OASDI** | **H & W** | **SUI** | **WK COMP**
--- | --- | --- | --- | --- | --- | --- | --- | --- | --- | ---
12-5055-0-2300-001-8500-2100-0000 | 000-00-0000 | FLINTSTONE WILMA | 620030 | 04-I | 04 | 070103/063004 | 49487.95 | 0.00 | 5156.64 | 0.00 | 6539.80 | 148.46 | 1591.53 | 13436.43
12-5055-0-2400-001-8500-2100-0000 | 000-00-0000 | GORDON FLASH | 670219 | 06-0023-06 | 070103/063004 | 8251.70 | 0.00 | 859.83 | 0.00 | 1615.75 | 24.76 | 265.37 | 2765.71
12-6055-0-2100-047-0001-1000-0000 | OPEN | CHILDCARE SPECIALIST | 020022 | 20-0022-03 | 090103/063004 | 14111.28 | 0.00 | 1470.40 | 0.00 | 3279.50 | 42.33 | 453.82 | 5246.05
12-6055-0-2300-001-0001-2100-0000 | 000-00-0000 | MOUSE MINNIE | 020022 | 03-H | 05 | 070103/063004 | 54914.00 | 0.00 | 5156.64 | 0.00 | 6539.80 | 148.46 | 1591.53 | 13000.98
12-6055-0-2400-001-0001-2100-0000 | 000-00-0000 | CRICKET JIMINY | 020077 | 02-0020-03 | 070103/063004 | 6889.00 | 0.00 | 717.83 | 0.00 | 1639.75 | 20.67 | 221.55 | 2599.80
12-6055-0-2300-001-0001-2100-0000 | 000-00-0000 | MOUSE MINNIE | 020022 | 03-H | 05 | 070103/063004 | 54914.00 | 0.00 | 5156.64 | 0.00 | 6539.80 | 148.46 | 1591.53 | 13000.98
12-6055-0-2400-001-0001-2100-0000 | 000-00-0000 | CRICKET JIMINY | 020077 | 02-0020-03 | 070103/063004 | 6889.00 | 0.00 | 717.83 | 0.00 | 1639.75 | 20.67 | 221.55 | 2599.80

**GROSS** | **TOTAL BEN** | **STRS** | **PERS** | **OASDI** | **H & W** | **SUI** | **WK COMP**
--- | --- | --- | --- | --- | --- | --- | ---
12-5055-0-2300-001-8500-2100-0000 | 49487.95 | 0.00 | 5156.64 | 0.00 | 6539.80 | 148.46 | 1591.53 | 13436.43
12-5055-0-2400-001-8500-2100-0000 | 8251.70 | 0.00 | 859.83 | 0.00 | 1615.75 | 24.76 | 265.37 | 2765.71
12-6055-0-2100-047-0001-1000-0000 | 14111.28 | 0.00 | 1470.40 | 0.00 | 3279.50 | 42.33 | 453.82 | 5246.05
12-6055-0-2300-001-0001-2100-0000 | 54914.00 | 0.00 | 5156.64 | 0.00 | 6539.80 | 148.46 | 1591.53 | 13000.98
12-6055-0-2400-001-0001-2100-0000 | 6889.00 | 0.00 | 717.83 | 0.00 | 1639.75 | 20.67 | 221.55 | 2599.80
12-6055-0-2300-001-0001-2100-0000 | 54914.00 | 0.00 | 5156.64 | 0.00 | 6539.80 | 148.46 | 1591.53 | 13000.98
12-6055-0-2400-001-0001-2100-0000 | 6889.00 | 0.00 | 717.83 | 0.00 | 1639.75 | 20.67 | 221.55 | 2599.80

**ACCOUNT TOTAL** | **TOTAL BEN** | **STRS** | **PERS** | **OASDI** | **H & W** | **SUI** | **WK COMP**
--- | --- | --- | --- | --- | --- | --- | ---
22,241.72 | 11,250.35 | 0.00 | 2,317.59 | 0.00 | 8,150.75 | 66.72 | 715.29
2,363,367.56 | 379,581.21 | 413,064.81 | 2,840.99 | 1,263,912.13 | 25,901.33 | 278,067.09
Projection Scattergram Report (PPS200)

Introduction

Use the Projection Scattergram Report to display projected salary and benefit costs by Salary Schedule Step/Range. The projection can be defined broadly or in great detail.

The selection criteria screens will vary depending on the options you select. Only the first and last screens (Figure 10-35 and Figure 10-42) are required to launch a report; all other screens are optional. Optional screens allow you to narrow the projection on the basis of specific bargaining units, salary schedules, accounts, locations, and a variety of PER/PAY Master File codes.

Figure 10-35: First Screen
See page 10-43.

Figure 10-36: First Screen with Bargaining Units
See page 10-46.

Figure 10-37: First Screen with Salary Schedules
See page 10-48.

Figure 10-38: Additional Selection Screen
See page 10-50.

Figure 10-39: Additional Selection Screen with Bargaining Units
See page 10-50.

Figure 10-40: Additional Selection Screen with Salary Schedules
See page 10-50.
Finding the Projection Scattergram Report

Look for a menu selection that reads something like "Scattergram Report." Highlight the selection and press <ENTER>. The first Projection Scattergram Screen will be displayed (Figure 10-43).

The Menu System Screens are user-defined and will vary from site-to-site. Ask your system administrator for help if you can't find the "Scattergram Projections" menu selection.

First Screen: Projection Scattergram Report

Complete the required fields, and press <ENTER>. The lower portion of this screen will display additional fields if the Selection field is B (see Figure 10-44) or S (see Figure 10-45).
Projection for year (R)  Type the two-digit number for the ‘Target’ or ‘Project FOR’ year. For example, 04 for 2004.

You must create at least one Work Calendar for the year to which you want to project. See Chapter 6 in this manual for instructions.

Use schedules for year (R)  Type the two-digit number for the ‘Source’ or ‘Project FROM’ year. The projection will use the Salary Schedules from this year.

Use employee records year (R)  Type the two-digit year that tells the program which year's employee data is to be used to calculate the projection.

If a position is unfilled, the position data rather than the employee data will be used.

Do step advancement (R)  This effects all selected employees.

\[ Y = \text{Project all scheduled advances for the selected employees.} \]
\[ N = \text{Do not project step advances.} \]

Selection (R)  This is the first field that determines who will be included in the projection.

\[ A = \text{All Schedules - Include all employees and open positions.} \]
\[ B = \text{Bargaining Units - Select specific bargaining units.} \]

Additional fields will display when you press <ENTER> (see page 10-46 for instructions).

When selecting by Bargaining Unit, be aware that the system will report all employees on the Salary Schedules to which the selected Bargaining Units are attached, not the Employees to which the Bargaining Units are attached on their MA screen.

\[ S = \text{Salary Schedules - Select specific salary schedules.} \]

Additional fields will display when you press <ENTER> (see page 10-48 for instructions).
**Percentage (O)**

If you entered a in the Selection field, you can type a percentage (in 999.9999 format) to apply an across-the-board annual increase to all salary schedules. Use a minus sign ‘-’ to project a decrease. For example, to project a decrease of five percent, enter -5.0000.

**Additional Selection (R)**

This field determines whether you will use the Additional Selection Screen (Figure 10-32) to narrow your selection criteria.

\[
\begin{array}{ll}
Y &= \text{Yes - Use the Additional Selection Screen.} \\
N &= \text{No - Do not use the Additional Selection Screen.}
\end{array}
\]

Specifically, you will be able to select employees and open positions based on:

- Job Codes
- Work Locations
- Pay Schedules
- Report Codes
- Job Category
- Work Calendars
- Bargaining Units
- Employee Types

<Start Over> No effect on this screen.

<Retrieve Presets> Retrieve a previously-defined report setting. See the appendix *Preset Maintenance* for details about <Retrieve Preset> and <Save Preset>.

<Previous Screen> No effect on this screen.

<Next Screen> Takes you to the Additional Selection Screen or Report Launch Screen.

<Return to Menu> Returns to your Menu System.
First Screen with Bargaining Units

Use this screen to limit the number of selected employees to specific Bargaining Units. Only employees on the Salary Schedules to which these Bargaining Units are attached will be selected. You also have the option to specify the percentage amount of annual increase or decrease for each unit.

When you use this screen, the program changes from ‘give them everything’ to ‘give them only what they ask for’ mode. This is to say, when you do not use this screen, all Bargaining Units attached to Salary Schedules are selected.

When you do use this screen, only those Salary Schedules attached to the Bargaining Units you specify are selected. Therefore, you must enter at least one Bargaining Unit. If you leave all Bargaining Unit fields blank on this screen, no records will be selected.

The Barg Unit and %Proj fields display after you enter B in the Select field on the first screen, and press <ENTER>.

![Figure 10-44: First Screen with Bargaining Units](image-url)
**Barg Unit (O)** Type the two-digit code for each Bargaining Unit you want to select. Only the employees on the Salary Schedules to which these Bargaining Units are attached will be selected. You must enter at least one code.

Bargaining Unit codes are defined in PER/PAY Master Files (PP0010). See Chapter 5 in this manual for details.

**% Proj (O)** Type a percentage (in 999.9999 format) to apply an annual increase for the Bargaining Unit. Use a minus sign '-' to project a decrease. For example, enter \(-5.0000\) to project a decrease of five percent.

Complete the screen and press <ENTER>. Then press <Next Screen> to continue.
First Screen with Salary Schedules

Use this screen to limit the projection to specific Salary Schedules. Only employees that use the specified Salary Schedules will be selected. You also have the option to specify the percentage amount of annual increase or decrease for each schedule.

When you use this screen, the program changes from ‘give them everything’ to ‘give them only what they ask for’ mode. This is to say, when you do not use this screen, all Salary Schedules are selected. When you use this screen, only the Salary Schedules you specify are selected. Therefore, you must enter at least one Salary Schedule. If you leave all Salary Schedule fields blank on this screen, no records will be selected.

The **Schedule** and **%Proj** fields display after you enter $ in the **Select** field on the first screen, and press <ENTER>.

![Figure 10-45: First Screen with Salary Schedules](image)

**Schedule (O)**

Type the two-digit Schedule Number in the first box of the Schedule field, to the left of the ‘-’. Enter at least one Schedule Number.

Type the two-digit Model Number in the second box of the Schedule field, to the right of the ‘-’.

Models are variations of a Salary Schedule. Model ‘00’ is always the ‘live’ production version, while Models ‘01’ through ‘99’ can be used for projecting proposed changes to the ‘00’ Model. (See Chapter 7 in this manual for more about Salary Schedules.)
Type a percentage (in 99.9999 format) to apply an annual increase for the Salary Schedule. Use a minus sign '-' to project a decrease. For example, enter \(-5.0000\) to project a decrease of five percent.

Complete the screen and press <ENTER>. Then press <Next Screen> to continue.
Additional Selection Screen

Use this screen to limit the number of employees and open positions selected on the basis of Master File codes. Specifically, you can select records based on:

- Job Codes
- Work Locations
- Pay Schedules
- Report Codes
- Job Category
- Work Calendars
- Bargaining Units
- Employee Types

You may want to print Master File Reports to see a listing of the valid Master File codes. See Chapter 5 of this manual for instructions.

The Additional Selection Screen (Figure 10-46) appears when you enter Y in the Additional Selection field on the first screen and press < ENTER>.

If you also entered B (Bargaining Unit) or S (Salary Schedule) in the Selection field on the first screen, more fields will display in the upper portion of the Additional Selection Screen (Figure 10-47 and Figure 10-48).

The Bargaining Unit fields in the upper portion of this screen are display-only. If you want to edit them, return to the previous screen. See page 10-46 for details about Bargaining Unit fields.

The Salary Schedule fields in the upper portion of this screen are display-only. If you want to edit them, return to the previous screen. See page 10-48 for details about Salary Schedule fields.
Once you enter a code, the program changes from ‘give them everything’ to ‘give them only what they ask for’ mode. For example, if you enter only one Job Code, then only employees with that code will be selected. If you leave all Job Code fields blank, then employees with any Job Code will be selected.

**Figure 10-49: Additional Selection Screen**

**Job Codes (O)**
Type the six-digit number for the Job Codes you want to select. Select up to 10 different Job Codes. Only employees with positions containing these codes will be selected.

Leave all Job Code fields blank to select ALL Job Codes.

Job Codes are defined with PER/PAY Master Files (PP0010). See Chapter 5 in this manual for details.

**Job Categories (O)**
Type the four-digit number for the Job Categories you want to select. Select up to 10 different Job Categories. Only employees with positions containing these categories will be selected.

Leave all Job Category fields blank to select ALL Job Categories.

Job Categories are defined in PER/PAY Master Files (PP0010). See Chapter 5 in this manual for details.
Work Locations (O)  Type the four-digit number for the Work Locations you want to select. Select up to 10 different Work Locations. Only employees with positions assigned to these locations will be selected.

Leave all Work Location fields blank to select ALL Work Locations.

Work Locations are defined in the Location Master File (LOUPDT). See Chapter 5 in this manual for details.

Work Calendars (O)  Type the four-digit number for the Work Calendars you want to select. Select up to 10 different Work Calendars. Only employees with positions attached to these calendars will be selected.

Leave all Work Calendar fields blank to select ALL Work Calendars.

Work Calendars are defined in Work Calendar Maintenance (PP0035). See Chapter 6 in this manual for details.

Pay Schedules (O)  Type up to six characters for the Pay Schedules you want to select. Select up to 10 different Pay Schedules. Only employees with positions assigned to these Pay Schedules will be selected.

Leave all Pay Schedule fields blank to select ALL schedules.

Pay Schedules are defined in PER/PAY Master Files (PP0010). See the QSS/OASIS Enhanced Payroll Manual for details.

Bargaining Units (O)  Type the two-digit number for the Bargaining Units you want to select. Select up to 10 different Bargaining Units. Only employees assigned to these units on their MA screen will be selected.

Leave all Bargaining Unit fields blank to select ALL Bargaining Units.

Bargaining Units are defined in the PER/PAY Master Files (PP0010). See Chapter 5 in this manual for details.

Report Codes (O)  Type the two-digit number for the Report Codes you want to select. Select up to 10 different Report Codes. Only employees assigned to these codes on their MA screen will be selected.

Leave all Report Code fields blank to select ALL Report Codes.

Report Codes are defined in the PER/PAY Master Files (PP0010). See the QSS/OASIS Personnel Manual for details.
**Employee Type (O)**  Type the two-character code for the Employee Types you want to select. Select up to 10 different Employee Types. Only employees assigned to these types on their MA screens will be selected.

Leave all Employee Type fields blank to select ALL Employee Types.

Employee Types are defined in the PER/PAY Master Files (PP0010). See the *QSS/OASIS Personnel Manual* for details.

<Start Over> Takes you back to the first screen.

<Previous Screen> Takes you back to the first screen.

<Next Screen> Takes you to the Report Launch Screen.

<Return to Menu> Returns you to your site Menu System.

Complete the screen and press <ENTER>. Then press <Next Screen> to continue to the Report Launch Screen.
Report Launch Screen

Use this screen to complete your selection criteria.

You can also go to the Accounts Subset Screen from here by entering Y in the 'Select a subset of your accounts?' field. The Accounts Subset Screen allows you to further limit your projection on the basis of financial accounts, and is described in the next section (see page 10-57).

Figure 10-50: Projection Scattergram Report Launch Screen

Report Title (O) Type up to 30 characters for the title you want to appear in the report heading.

You may want to include your name and extension number to facilitate routing after printing.

Select a subset of your accounts? (R) This field determines whether you will use the Accounts Subset Screen.

- Y = Yes. Select specific financial accounts.
- N = No. Do not limit the projection by accounts.

If you type Y, the Accounts Subset Screen will display when you press <ENTER>. 
Total FTE for positions active on (R) - Include the total FTE for all Authorized Positions that will be active on this date.

The date must be within the fiscal year you entered in the Projection for year field on the first screen.

Select this date carefully. If you select 07/01/yy, for example, there may be no teachers included on the report since their positions do not become effective until late August.

Include open? (R) - This field determines whether or not open, unfilled positions will be included in the projection.

\[ \begin{align*} 
Y &= \text{Yes - Include open, unfilled positions in the projection.} \\
N &= \text{No - Do not include open, unfilled positions.} 
\end{align*} \]

Hire date range (O) - To limit the report to individuals hired during a particular period of time, enter the beginning date of the period in the first field and the ending date in the second field.

Use the MMDDYY or MMDDYYYY format. The program will format the date when you press <ENTER>. For example, 063005 will be formatted 06/30/2005.

Print FTE (R) - This field determines whether or not the FTE will be printed on the report.

\[ \begin{align*} 
Y &= \text{Yes - Print the FTE.} \\
N &= \text{No - Do not print the FTE.} 
\end{align*} \]

Print salary (R) - This field determines whether or not salaries will be printed on the report.

\[ \begin{align*} 
Y &= \text{Yes - Print the salary amounts.} \\
N &= \text{No - Do not print the salary amounts.} 
\end{align*} \]

Base pay only (R) - This field allows you to limit the salary shown to base pay only.

\[ \begin{align*} 
Y &= \text{Yes - Print the base pay amounts only.} \\
N &= \text{No - Do not limit to base pay amounts only.} 
\end{align*} \]

Print Benefits (R) - This field determines whether or not benefits will be printed on the report.

\[ \begin{align*} 
Y &= \text{Yes - Print the benefit amounts.} \\
N &= \text{No - Do not print the benefit amounts.} 
\end{align*} \]
**Select Restriction**

Enter the appropriate code from the following list to set the account restriction to be used in the report.

- **C** Combine restricted and unrestricted accounts.
- **S** Segregate the restricted and unrestricted accounts.
- **U** Unrestricted accounts only.
- **R** Restricted accounts only.

**Restrict on**

If you have chosen a restriction other than C (combined), indicate the field in your account string that determines restriction.

**Choose from**

Choose the correct two-character code from the list displayed on the screen for the account field that determines restriction.

- **<Start Over>** Takes you to the first screen.
- **<Save Presets>** When you press <ENTER>, if there are no error messages and you have not requested to select a subset of your accounts, the <Save Presets> function key is displayed. Press this key to save your current report settings for later retrieval.
- **<Previous Screen>** Takes you to the previous screen.
- **<Next Screen>** No effect on this screen.
- **<Launch Job>** When you press <ENTER>, if there are no error messages and you have not requested to select a subset of your accounts, the <Launch Job> function key is displayed. Press <Launch Job> to create the Scattergram Report.
- **<Return to Menu>** Returns to your Menu System.

Complete the screen and press <ENTER>. If you entered Y in the ‘Select a subset of your accounts?’ field, the Account Subsets Screen will be displayed. If you are not using the Account Subsets Screen, press the <Launch Job> function key to create the Salary Projection Report.
**Accounts Subset Screen**

Use this screen to limit the number of records to specific Payroll Labor Accounts. Only employees/positions paid from the specified accounts will be selected. You can enter up to 10 different account masks or a series of Field and Range combinations.

Once you enter an account code mask, the program changes from "give them everything" to "give them only what they ask for" mode. For example, if you enter only one valid account number, then only employees paid from that account will be selected. If you leave all account field masks blank, then records from all accounts will be selected.

The Accounts Subset Screen displays when you enter Y in the ‘Select a subset of your accounts?’ field on the Report Launch Screen, and press <ENTER>.

![Accounts Subset Screen Diagram](image)

**Figure 10-51: Accounts Subset Screen**

*title row* (O) The title row lists the name for the fields in the financial account.

This sample is for illustration only. The screen will show the account structure for your district.
There are 10 lines. Leave all lines blank, or type up to 10 account masks.

Leave all 10 lines blank to select all accounts.

If you enter account masks on one or more lines, only those lines will be used. (Other accounts may be still selected based on ranges of field values.)

To select accounts based on account masks, type up to 10 account masks. To make filling in account masks easier, press <ENTER> to fill all 10 rows with question marks. Then fill in the masks you need.

The example above illustrates how account masking works. Each question mark ( ? ) is a wildcard that stands for one digit or letter.

**ACCOUNTS SELECTED**

1. All accounts in Fd (fund) 10.
2. All accounts that contain Goal (Program goal) 5864.
3. All accounts for Fd 10 and Objt (Object) 4??? (4000-4999). (If you state uses letters and numbers in accounts, 4??? matches the numeral 4 followed by any 3 letters or numbers.)
4. All accounts for Fd 20 and Objt 82?? (8200 - 8299).

5 - 10. Not used.

In this example, an account is included in the transfer if it matches any one of the masks in lines [1] through [4].
The **Field** and **Range** fields are for entering field value ranges.

**Field (O)** Leave blank, or type the 2-letter abbreviation for a field value.

**Range (O)** If **Field** contains a value, enter the beginning and ending value for the range.

In the example above, accounts with objects from 8500 to 8549 would be selected.

Complete the screen and press `<ENTER>`. Then press `<Previous Screen>` to return to the launch screen. Then press `<Launch Job>`. 
Sample Projection Scattergram Report (PPS200)

A sample cover page is shown below. See sample text page on the following page.

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ENTRY LISTING

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- Schedule Year : 05
- Employee Year : 05
- Allow Step Changes : NO
- Report Type : ALL SCHEDULES
- Global Projections : 0.0000%
- Job Codes :
- Job Categories :
- Open Positions : NO
- Pay Schedules :
- Matrix Legend : FTE  SALARY  BENEFITS
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