**CODE TABLE QUESTIONS ADDRESSED**

March 9, 2012

**Internal Program**

The Program Related Investment code is used to designate an unpaid PRI; PNIC is an example. A PRI that has been paid will need expenditure accounting and the search is run on the Exp Resp – PRI code, as in the case of Free Congress (1995).

**Population Served (A code is *required* in this field when grant is awarded)**

These three codes indicate if the grant should be included in the Wisconsin Report, the Annual Report, or neither. Since the grants listed in the Wisconsin Report are also used in the Annual Report, when running the report of grants needed for the Annual Report, both the WR and AR are selected.

**Gifted Education code on page 8, in the Program Area field**

The Gifted Education code was deactivated when the original Program Area codes were discontinued. It was then included in the new set of Program Area codes. I few years back when the current 4-Sector Program Area started, none of the program areas included gifted education. The Gifted code was moved to a sub-category of the “None” program area, which are grants not part of the 4-sector program budget. But this wasn’t feasible because all board-awarded sector grants need to be accounted for in one of the Program Area sectors. At that time, a GIFTED Education code was added to the Type of Support field, which allowed the grant to be included as usual in the total of its Program Area (sector) report (IRA, Imp, Ideas, Leg), yet available in another field to search, and therefore continue to track, Gifted Education. The previously used Program Area (Sector) codes are available as search criteria so a complete picture of Gifted Education grants since the beginning of the Foundation can be retrieved by using the older and current Gifted Ed codes in the search.

**Grant Requirement in Activity Type**

Tax Return code is available to record that the grantee has submitted a copy of their tax return (we note the year of the return submitted in the notes field). In the event anyone wants to review it, it can be easily retrieved from the proposal’s file.

The W-9 code refers to Bradley Prize winners and Selectors. It is noted “complete” when this required item has been received so payment can be released.

**Payment Status in Activity Type**

The system automatically records “refund” as an activity that occurred for the grant, but the “refund” code is also used in the payment type field when funds are returned to the Foundation so it becomes part of the financial statistics as well.

The “voided payment” is an activity (something that occurred for the grant) as in the above example, but the “reissue” is the same as the new payment that is automatically recorded when the replacement check is cut. To find any payments that are actually replacement payments, the word “reissue” needs to be typed into the notes field of the payment being reissued so it can be searched on; the new payment status will be “paid.” Currently I’m considering adding “Reissue” as a new payment type, but need further research. I suspect it would not automatically pull into reports using Paid amounts, like monthly and YTD totals.

**Contact Role**

When we first started using the system in 1992, there was a system code (unchangeable) but for some reason we thought we needed a different Employee code for a person who had no other “reason” or position description other than the fact they were affiliated with the organization. We discovered the system used “Employee” with every contact associated with an organization, in addition to other codes of Primary Contact, Office of Research administration, etc. Same with the Payee and Primary Contact codes; hence our added codes were deactivated.

**Discipline Field in Contact Record**

Originally, the broad field of study was used here to be merged with the Bradley Fellow letters. These fields have recently been expanded. When merging the Bradley Fellow renewal or invitation letters, we need to specifically designate where the funds are allocated to be spent, rather than the field of discipline. To do this, we added the specific name of the school, department, or institute for which the Professor is allowed to use Fellowship funds. The specific name is then pulled into the letter. Hence, many are very similar in name.

**Codes Used in the Giving Program / Type / Status Fields**

Some codes can be used for all of the three potential dispositions of a request: Approved, Declined, Pending. Many are specific to a disposition. For example an Active Grant cannot be Declined, so the Approved code is shown in the center column of the report. “Other” is a status code that can be applied to Pending, Declined, and even Approved, so no disposition is indicated.

An easier example is Bradley Prize. From the time the nomination is entered into the database it is coded as “Bradley Prize 2012.” When the winners are chosen, all of these pending requests are declined, but are still “Bradley Prize 2012” as opposed to any other year.

**Inactive Mailing List Codes**

At one time many years ago, someone wanted Regions designated so a report could be run for any of these particular areas of the country staff may be traveling to and want to include meetings with additional grantees. These were never actually used and were discontinued when e-Tapestry was installed. The term Wisconsin Foundations was selected over the term Local Foundations.