

# 6.4 - Instructions for Compensation Administration Tool (CAT) Entry

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## Purpose and Overview

The Compensation Administration Tool (CAT) supports the administration of compensation and funding changes at the employee level. Updates to the CAT are made manually in CAT on an employee-by-employee basis. The CAT interfaces to the current budget system and the HRS environment.

The CAT has a feature that allows HRS job changes to flow through to the CAT. The feature is called the HRS Automatic Job Data Feed. The feed will be active until approximately April 1 for each budget cycle. While active, changes made to employee records in HRS will update employee data in the CAT. The CAT page is divided into three sections: Employee Attributes, Recent and Future HR/Compensation Transactions and Compensation and Funding Data.

1. **Employee Attributes:** This topmost section displays basic job related attributes pulled from HRS for the selected employee record. This section is not editable, but will be updated with any changes (except position number changes) made in HRS through a nightly batch process when the Automatic HRS feed is on.
2. **Recent and Future HR/Compensation Transactions:** This section displays recently entered transactions which have occurred in HRS to the selected employee's job record and are relevant to the compensation process. This section is not editable, and will also be automatically updated when the HRS feed is on. Compensation changes appearing in this section will flow through to the CAT record and will update the Comp Rate field of the CAT Page.
3. **Compensation and Funding Data:** This section is where users modify Planned FTE and Planned Title as well as enter Compensation and Funding changes.

CAT Page

Fiscal Year: 2017  
Name: MICHAEL BLUTH  
Empl ID: 01234567  
Position: 01234567

Rcd #: 0

Business Unit: UWMSN  
HRS Home Dept: A348700  
Jobcode: E10LN  
Annual - Min: \$40,861.000  
Max: \$100,000,000.000

VCRGE/WAISMAN/WAISMAN  
ASSISTANT SCIENTIST

Empl Class: AS  
Pay Basis: A  
Expected Job End Dt:  
Other Active Jobs? N

Academic Staff  
Annual

Useful Links: [HRS Job Data Page](#) [HRS Workforce Summary](#) [HRS Multiple Jobs Summary](#)

Recent and Future HR / Compensation Transactions

Effective Date

Position Number

Job Code

Title

Action

Action Reason

FTE

Compensation Rate

Change Amount

Annual Comp Rate Adjusted for FTE

12/14/2015 01234567 E10LN ASSISTANT SCIENTIST Posn Chg Change FTE - Temp - Voluntary 0.875000 86709.000000 75870.375000  
07/01/2015 01234567 E10LN ASSISTANT SCIENTIST Data Chg Encumbrance Date Updates 1.000000 86709.000000 86709.000000

Compensation and Funding Data

Effective Date: 07/01/2016

Planned FTE: 1.000000

Planned Title: ASSISTANT SCIENTIST

Automatic HRS Job Data Feed for this Empl Rcd: Active

Rate Calculation Type: Cumulative (IPS v2)

Comp Rate: 86709.000000

Add Salary to Continuing Staff Base?: ☒

Compensation Change

Action

Action Reason

Change Amount (\$)

Change Percent (%)

New Comp Rate

New Annual Comp Rate Adjusted for FTE

1 Pay Rate Change 0.000000 0.000 \$86,709.000000 \$86,709.000

Final Calculated Compensation as of Effective Date:

Comp Rate = \$86,709.000

Annual Rate Adjusted for FTE = \$86,709.000

Ok to Load to HRS

Last Update:

by

Funding Change

GL Business Unit

Department

Fund

Program

Project

Distribution %

Budgeted FTE

Budgeted Amount

Full Time Rate

Funding Edits Status

UWMSN 534255 144 4 10.000 0.100000 8,671.000 \$86,709.000000 SFS Edits Passed  
UWMSN 348700 144 4 47.000 0.470000 40,753.000 \$86,709.000000 SFS Edits Passed  
UWMSN 348700 233 4 PRJ68AT 35.000 0.350000 30,348.000 \$86,709.000000 SFS Edits Passed

Funding Totals:

100.000

1.000000

\$86,709.000

Ok to Load to HRS

Last Update: 11/17/15 10:03:43PM by UW\_IPS\_LOAD(HREE6212)

Comments:

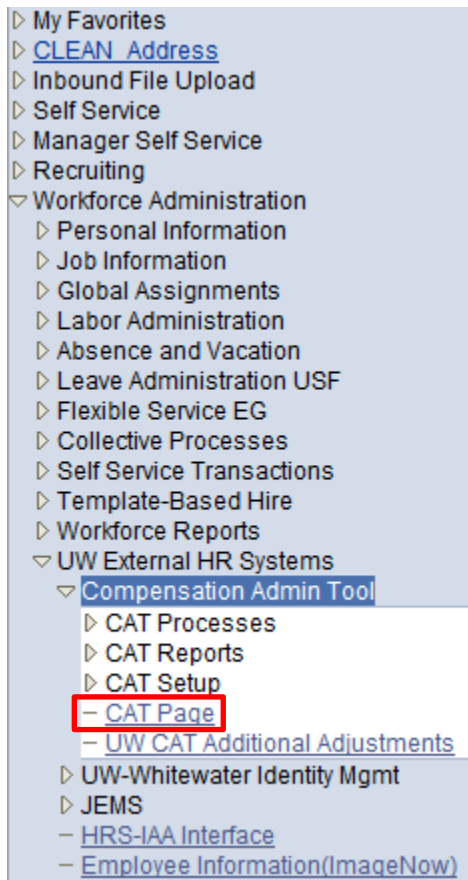
Delete CAT Record

CAT Errors

2

## Search Page/Add a Value

1. Navigate to the CAT Page.
  - a. Log in to HRS and navigate to **Workforce Administration > UW External HR Systems > Compensation Admin Tool > CAT Page** (Shown in the image below).



2. Search for records already present in the CAT or Add a New Value.
  - a. To search for records already present in the CAT make sure Find an Existing Value tab is selected.
    - i. Enter desired search criteria, such as Fiscal Year and Empl ID, Last Name, etc.

## CAT Page

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

Find an Existing Value

Add a New Value

▼ Search Criteria

Use Saved Search: ▼

Fiscal Year:

= ▼

2017

Business Unit:

begins with ▼

UWMSN

HR Department:

begins with ▼

Funding Dept:

begins with ▼

Fund Code:

begins with ▼

Empl ID:

begins with ▼

Empl Rcd Nbr:

= ▼

Last Name:

begins with ▼

Name:

begins with ▼

Position Number:

begins with ▼

Employee Class:

begins with ▼

Job Code:

begins with ▼

Pay Basis:

= ▼


▼

☐ Case Sensitive

Search


Clear

Basic Search

 Save Search Criteria

Delete Saved Search

- ii. Leaving a field blank in the Search Criteria will return all possible values for that field in the search.
- iii. A search using only one data field will show all records from the CAT that match the selected criteria. A search using a combination of these fields will return a more focused results page.
- iv. Select the magnifying glass located at the end of each field selection tab to display all possible input values for the corresponding field.
  1. For example, the magnifying glass next to Business Unit will return a clickable list of all 16 Business Units.

**Business Unit:** begins with ▼  

- v. Select "Search" to return results.

## CAT Page

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

[Find an Existing Value](#)

[Add a New Value](#)

### Search Criteria

Use Saved Search:

Fiscal Year:	=	2017
Business Unit:	begins with	UWMSN
HR Department:	begins with	
Funding Dept:	begins with	
Fund Code:	begins with	
Empl ID:	begins with	
Empl Rcd Nbr:	=	
Last Name:	begins with	BLUTH
Name:	begins with	
Position Number:	begins with	
Employee Class:	begins with	
Job Code:	begins with	
Pay Basis:	=	

☐ Case Sensitive

[Search](#)

[Clear](#)

[Basic Search](#)



[Save Search Criteria](#)

[Delete Saved Search](#)

vi. Search results will return one row for every funding string entered in the CAT.

1. It will return a search results box if the criteria identifies multiple employee rows.
2. It will direct the user to the CAT page if the search criteria identifies one employee row.

Example: The search results below show four rows for Michael Bluth because he has four unique funding splits assigned to his employee record.

### Search Results

[View All](#)

First [1](#) 1-4 of 4 [Last](#)

Fiscal Year	Business Unit	HR Department	Funding Dept	Fund Code	Last Name	Name	Empl ID	Empl Rcd Nbr	Position Number	Employee Class
2017	UWMSN	A348700	348700	144	BLUTH	MICHAEL BLUTH	01234567	0	01234567	AS
2017	UWMSN	A348700	348700	233	BLUTH	MICHAEL BLUTH	01234567	0	01234567	AS
2017	UWMSN	A348700	531250	233	BLUTH	MICHAEL BLUTH	01234567	0	01234567	AS
2017	UWMSN	A348700	534255	144	BLUTH	MICHAEL BLUTH	01234567	0	01234567	AS

- b. To add a record to the CAT, select the Add a New Value tab found at the top of the CAT page. (This is how you will add new hires or update employees with positions changes)

### CAT Page

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

Find an Existing Value Add a New Value

▼ Search Criteria

Use Saved Search: ▼

Fiscal Year: = ▼ 2017 🔍

Business Unit: begins with ▼ 🔍

HR Department: begins with ▼ 🔍

Funding Dept: begins with ▼ 🔍

Fund Code: begins with ▼ 🔍

Empl ID: begins with ▼ 🔍

Empl Rcd Nbr: = ▼

Last Name: begins with ▼

Name: begins with ▼


Position Number: begins with ▼

Employee Class: begins with ▼ 🔍

Job Code: begins with ▼ 🔍

Pay Basis: = ▼ ▼

☐ Case Sensitive

Search Clear [Basic Search](#)  [Save Search Criteria](#) [Delete Saved Search](#)

- i. In order to add a record, you must enter Fiscal Year, Empl ID and Empl Rcd Nbr to create a new CAT record.

**CAT Page**

Find an Existing Value Add a New Value

Fiscal Year: 2017 🔍

Empl ID:

Empl Rcd Nbr: 0

- ii. Select Add to create a new record.

**CAT Page**

Find an Existing Value Add a New Value

Fiscal Year: 2017 🔍

Empl ID: 01234567

Empl Rcd Nbr: 0

Add

## Compensation Administration Tool Page- Employee Attributes

1. The topmost section on the CAT Page is the Employee Attributes section.
  - a. This section displays basic job related attributes about the selected Employee Record and Position.
    - i. Fields included in this section are Fiscal Year, Business Unit, Empl Class, Name, HRS Home Dept, Pay Basis, Empl ID, Rcd #, Job Code, Expected Job End Dt, Position, Annual-Min, Max and the Other Active Jobs? indicator.
  - b. Additional information on the employee can be accessed quickly by clicking the links to the HRS Job Data Page, HRS Workforce Summary, and HRS Multiple Jobs Summary.
2. Changes made in HRS flow through to this section while the HRS Job Data Feed is active. The HRS Job Data Feed updates this section on a nightly basis.
  - i. Note: Position Number changes will not update CAT records through the HRS Job Data Feed. (If an employee's position number changes, they will appear on the Compare Report. The old employee record, with the outdated position number, will need to be deleted from CAT. The employee will need to be added back to CAT in order to update the employee to their new position.)

CAT Page		
<b>Fiscal Year:</b> 2017	<b>Business Unit:</b> UWMSN	<b>Empl Class:</b> AS Academic Staff
<b>Name:</b> MICHAEL BLUTH	<b>HRS Home Dept:</b> A348700 VCRGE/WAISMAN/WAISMAN	<b>Pay Basis:</b> A Annual
<b>Empl ID:</b> 01234567	<b>Jobcode:</b> E10LN ASSISTANT SCIENTIST	<b>Expected Job End Dt:</b>
<b>Position:</b> 01234567	<b>Annual - Min:</b> \$40,861.000	<b>Max:</b> \$100,000,000.000
<b>Rcd #:</b> 0	<b>Other Active Jobs?</b> N	
Useful Links: <a href="#">HRS Job Data Page</a> <a href="#">HRS Workforce Summary</a> <a href="#">HRS Multiple Jobs Summary</a>		

## Recent and Future HR/Compensation Transactions

1. This section displays transactions recently entered in HRS that apply to the selected employee's job record and are relevant to the compensation process. Changes in HRS will appear in this section while the HRS Job Data Feed is active.
  - a. Changes to FTE, Job Code, Title, Pay Rate, Pay Basis, Expected Job End Date (EJED) Position Number, etc. will appear in this section.
  - b. The fields that are displayed for each transaction are Effective Date, Position Number, Job Code, Title, Action, Action Reason, FTE, Compensation Rate, Change Amount and Annual Comp Rate Adjusted for FTE.

Recent and Future HR / Compensation Transactions									
Effective Date	Position Number	Job Code	Title	Action	Action Reason	FTE	Compensation Rate	Change Amount	Annual Comp Rate Adjusted for FTE
12/14/2015	01234567	E10LN	ASSISTANT SCIENTIST	Posn Chg	Change FTE - Temp - Voluntary	0.875000	86709.000000		75870.375000
07/01/2015	01234567	E10LN	ASSISTANT SCIENTIST	Data Chg	Encumbrance Date Updates	1.000000	86709.000000		86709.000000

- c. By default, this section displays the three most future dated transactions with the most future dated transaction at the top. If no future dated transactions exist, the three most recent transactions, within the last 18 months, will display.
  - i. Selecting View All will display all transactions meeting the criteria for this section entered within the last 18 months.

Recent and Future HR / Compensation Transactions									
Effective Date	Position Number	Job Code	Title	Action	Action Reason	FTE	Compensation Rate	Change Amount	Annual Comp Rate Adjusted for FTE
12/14/2015	01234567	E10LN	ASSISTANT SCIENTIST	Posn Chg	Change FTE - Temp - Voluntary	0.875000	86709.000000		75870.375000
07/01/2015	01234567	E10LN	ASSISTANT SCIENTIST	Data Chg	Encumbrance Date Updates	1.000000	86709.000000		86709.000000

## Compensation and Funding Data

1. In this section, users can update Planned FTE, Planned Title, Add to Continuing Staff Base, Compensation Changes and Funding.

Effective Date: 07/01/2016		Planned FTE: 0.875000	Planned Title: ASSISTANT SCIENTIST	Automatic HRS Job Data Feed for this Empl Rcd: Active
Rate Calculation Type: Cumulative (IPS v2)		Comp Rate: 86709.000000	Add Salary to Continuing Staff Base?: <input checked="" type="checkbox"/>	

Compensation Change					
Action	Action Reason	Change Amount (\$)	Change Percent (%)	New Comp Rate	New Annual Comp Rate Adjusted for FTE
1 Pay Rate Change		0.000000	0.000	\$86,709.000000	\$75,870.000
Final Calculated Compensation as of Effective Date:		Comp Rate = \$86,709.000	Annual Rate Adjusted for FTE = \$75,870.000		
Last Update: by					

Funding Change									
GL Business Unit	Department	Fund	Program	Project	Distribution %	Budgeted FTE	Budgeted Amount	Full Time Rate	Funding Edits Status
UWMSN	534255	144	4		10.000	0.087500	7,586.000	\$75,870.000000	SFS Edits Passed
UWMSN	348700	144	4		47.000	0.411250	35,659.000	\$75,870.000000	SFS Edits Passed
UWMSN	348700	233	4	PRJ88AT	35.000	0.306250	26,555.000	\$75,870.000000	SFS Edits Passed
UWMSN	531200	144	4		8.000	0.070000	6,070.000	\$75,870.000000	SFS Edits Passed
Funding Totals:					100.000	0.875000	\$75,870.000	Ok to Load to HRS	

- a. When the CAT is populated, the Planned FTE defaults to the HRS FTE. For budget purposes, the Planned FTE can be updated on the CAT Page.
  - i. Changing the Planned FTE will alter the FTE and budgeted amount that is sent back to the Budget Summary. It will not alter the true HRS FTE.
  - ii. Total Planned FTE cannot be greater than 1.
  - iii. You may only enter a planned FTE change on employee records for whom you are their HRS home department. Even if your division represents 100% of the employee's funding but is not the HRS home department, you must communicate with staff in their home division budget office to have that planned FTE change entered on the employee's CAT record.

Effective Date: 07/01/2016		Planned FTE: 0.875000	Planned Title: ASSISTANT SCIENTIST	Automatic HRS Job Data Feed for this Empl Rcd: Active
Rate Calculation Type: Cumulative (IPS v2)		Comp Rate: 86709.000000	Add Salary to Continuing Staff Base?: <input checked="" type="checkbox"/>	

- b. Planned Title defaults to the Job Code Description (otherwise known as HRS Title) attached to that position in HRS.



- i. Users can change the Planned Title on the CAT Page. It **will not** alter the true HRS FTE.
- ii. Clicking on the magnifying glass will display all available HRS values for title.

Compensation and Funding Data			
Effective Date: 07/01/2016	Planned FTE: 0.875000	Planned Title: ASSISTANT SCIENTIST	Automatic HRS Job Data Feed for this Empl Rcd: Active
Rate Calculation Type: Cumulative (IPS v2)	Comp Rate: 86709.000000	Add Salary to Continuing Staff Base?: <input checked="" type="checkbox"/>	

- c. The Add to Continuing Staff Base (CSB) box identifies whether an employee's salary is included in the Continuing Staff Base calculation and loads to the CAT Summary Page as part of the CSB. In a pay plan year, supplemental information on CSB will be provided in the appendix section of the CAT Technical Instructions.

- i. Any employee that is eligible for merit should have this box checked to be included in the CSB.
- ii. **This box is not relevant for the 2017-18 budget process.**

Compensation and Funding Data			
Effective Date: 07/01/2016	Planned FTE: 0.875000	Planned Title: ASSISTANT SCIENTIST	Automatic HRS Job Data Feed for this Empl Rcd: Active
Rate Calculation Type: Cumulative (IPS v2)	Comp Rate: 86709.000000	Add Salary to Continuing Staff Base?: <input checked="" type="checkbox"/>	

## Compensation Change Section

1. While the Automatic HRS Job Data Feed is Active, all approved compensation changes entered in HRS will automatically update the CAT record (this process occurs nightly). You can enter compensation change adjustments to this section of the CAT page if compensation changes are still pending (not yet approved by OHR and not yet reflected in HRS) or if the Automatic Feed is Inactive. The manual entry of compensation change adjustments may help divisions to accurately tie-out to their budget allocations while compensation changes are still in the review/approval process (i.e., not yet approved at all levels, so not yet reflected in HRS).
  - a. The Compensation Change section by default displays three rows.
    - i. If more than three adjustments are entered select "View All" to see the complete list.
  - b. **Note:** (if you enter a compensation adjustment and the compensation change subsequently flows through HRS, you will be able to identify this duplicate action reason on the HRS to CAT Compare Report. You will then need to go into CAT and delete the adjustment.)
  - c. You may only enter a compensation change adjustment on employee records for whom you are their HRS home department. Even if your division represents 100% of the employee's funding but is not the HRS home department, you must communicate with staff in their home division budget office to have the adjustment entered on the employee's CAT record.

Compensation and Funding Data

Effective Date: 07/01/2016      Planned FTE: 1.000000      Planned Title: ASSISTANT SCIENTIST      Automatic HRS Job Data Feed for this Empl Rcd: Active

Rate Calculation Type: Cumulative (IPS v2)      Comp Rate: 86709.000000      Add Salary to Continuing Staff Base?: ☒

Action	Action Reason	Change Amount (\$)	Change Percent (%)	New Comp Rate	New Annual Comp Rate Adjusted for FTE
1 Pay Rate Change	042 - IS Market Adjustment	2,291.000000	2.642	\$89,000.000000	\$89,000.000

Final Calculated Compensation as of Effective Date:      Comp Rate = \$89,000.000      Annual Rate Adjusted for FTE = \$89,000.000      ☐ Ok to Load to HRS

2. To add a new compensation adjustment select the “+” located at the far right of the table.

- a. When a new row is added the Action Reason, Change Amount and Change Percent fields all default to blank.

Compensation and Funding Data

Effective Date: 07/01/2016      Planned FTE: 1.000000      Planned Title: ASSISTANT SCIENTIST      Automatic HRS Job Data Feed for this Empl Rcd: Active

Rate Calculation Type: Cumulative (IPS v2)      Comp Rate: 86709.000000      Add Salary to Continuing Staff Base?: ☒

Action	Action Reason	Change Amount (\$)	Change Percent (%)	New Comp Rate	New Annual Comp Rate Adjusted for FTE
1 Pay Rate Change	042 - IS Market Adjustment	2,291.000000	2.642	\$89,000.000000	\$89,000.000
2 Pay Rate Change		0.000000	0.000	\$89,000.000000	\$89,000.000

Final Calculated Compensation as of Effective Date:      Comp Rate = \$89,000.000      Annual Rate Adjusted for FTE = \$89,000.000      ☐ Ok to Load to HRS

3. Enter the desired values into the Action Reason, and Change Amount or Change Percent tabs.

- a. Compensation adjustments can be entered into either the Change Amount or Change Percent field. The other field will calculate accordingly.
- b. No compensation changes other than Merit will ever load from CAT to HRS. Other than Merit, all compensation changes will still need to be entered and approved in the Rate and Title system. Supplemental information regarding Merit increases will be provided during a pay plan year.

Compensation and Funding Data

Effective Date: 07/01/2016      Planned FTE: 1.000000      Planned Title: ASSISTANT SCIENTIST      Automatic HRS Job Data Feed for this Empl Rcd: Active

Rate Calculation Type: Cumulative (IPS v2)      Comp Rate: 86709.000000      Add Salary to Continuing Staff Base?: ☒

Action	Action Reason	Change Amount (\$)	Change Percent (%)	New Comp Rate	New Annual Comp Rate Adjusted for FTE
1 Pay Rate Change	042 - IS Market Adjustment	2,291.000000	2.642	\$89,000.000000	\$89,000.000
2 Pay Rate Change	003 - Promotion/Progression	4,000.000000	4.494	\$93,000.000000	\$93,000.000

Final Calculated Compensation as of Effective Date:      Comp Rate = \$93,000.000      Annual Rate Adjusted for FTE = \$93,000.000      ☐ Ok to Load to HRS

4. Verify the rate increases have been applied in the correct order.

- a. UW-Madison uses a cumulative method in calculating pay increases. This means each pay increase builds off the prior increase (see image above as an example).

Therefore, it is important that compensation adjustments that are effective on the same date are entered in the correct order.

- b. In a pay plan year, merit should always be entered last.
  - c. Contact the Office of Human Resources for more information on sequencing of compensation adjustments (or see campus pay adjustment policy, section B.II at <https://kb.wisc.edu/ohr/policies/page.php?id=53379>).
5. At the bottom of the Compensation Change section, the Comp Rate (Annualized Rate for A, C basis and Hourly Rate for H basis) and Annual Rate Adjusted for FTE will be automatically calculated.

Compensation and Funding Data

Effective Date: 07/01/2016      Planned FTE: 1.000000      Planned Title: ASSISTANT SCIENTIST      Automatic HRS Job Data Feed for this Empl Rcd: Active

Rate Calculation Type: Cumulative (IPS v2)      Comp Rate: 86709.000000      Add Salary to Continuing Staff Base?: ☒

Action	Action Reason	Change Amount (\$)	Change Percent (%)	New Comp Rate	New Annual Comp Rate Adjusted for FTE
1 Pay Rate Change	042 - IS Market Adjustment	2,291.000000	2.642	\$89,000.000000	\$89,000.000
2 Pay Rate Change	003 - Promotion/Progression	4,000.000000	4.494	\$93,000.000000	\$93,000.000

Final Calculated Compensation as of Effective Date:      **Comp Rate = \$93,000.000**      **Annual Rate Adjusted for FTE = \$93,000.000**      ☐ Ok to Load to HRS

6. Keep Ok to Load to HRS box **unchecked**.
- a. **Note: If a compensation change is entered, upon saving, the Ok to Load to HRS box is automatically checked. Users will need to manually uncheck the box and save again.**
  - b. Unless it is a pay plan year, the Ok to Load to HRS box should remain unchecked. Supplemental information will be provided during a pay plan year.

Compensation and Funding Data

Effective Date: 07/01/2016      Planned FTE: 1.000000      Planned Title: ASSISTANT SCIENTIST      Automatic HRS Job Data Feed for this Empl Rcd: Active

Rate Calculation Type: Cumulative (IPS v2)      Comp Rate: 86709.000000      Add Salary to Continuing Staff Base?: ☒

Action	Action Reason	Change Amount (\$)	Change Percent (%)	New Comp Rate	New Annual Comp Rate Adjusted for FTE
1 Pay Rate Change	042 - IS Market Adjustment	2,291.000000	2.642	\$89,000.000000	\$89,000.000
2 Pay Rate Change	003 - Promotion/Progression	4,000.000000	4.494	\$93,000.000000	\$93,000.000

Final Calculated Compensation as of Effective Date:      Comp Rate = \$93,000.000      Annual Rate Adjusted for FTE = \$93,000.000      ☐ Ok to Load to HRS

7. An audit stamp will appear below the Compensation Change Table displaying the Empl ID and Name of the last person to apply changes to it as well as the date and time that the changes occurred.

Compensation and Funding Data

Effective Date: 07/01/2016      Planned FTE: 1.000000      Planned Title: ASSISTANT SCIENTIST      Automatic HRS Job Data Feed for this Empl Rcd: Active

Rate Calculation Type: Cumulative (IPS v2)      Comp Rate: 86709.000000      Add Salary to Continuing Staff Base?: ☒

Action	Action Reason	Change Amount (\$)	Change Percent (%)	New Comp Rate	New Annual Comp Rate Adjusted for FTE
1 Pay Rate Change	042 - IS Market Adjustment	2,291.000000	2.642	\$89,000.000000	\$89,000.000
2 Pay Rate Change	003 - Promotion/Progression	4,000.000000	4.494	\$93,000.000000	\$93,000.000

Final Calculated Compensation as of Effective Date:      Comp Rate = \$93,000.000      Annual Rate Adjusted for FTE = \$93,000.000      ☐ Ok to Load to HRS

**Last Update: 12/14/15 3:04:26PM by: 01234567      Clay Mathews**

## Funding Change Section

8. The rows in the Funding Change section are initially populated with funding data that has been entered into commitment accounting at the date of CAT initialization.
  - a. Funding can be updated manually by typing over existing data.
  - b. New rows can be added to by selecting "+" to add a new row.
    - i. The new row will populate with blank values.
  - c. Existing rows can be deleted by selecting the "-" next to the unwanted row.

Funding Change										Personalize   Find   View 3	First 1 of 4 Last
GL Business Unit	Department	Fund	Program	Project	Distribution %	Budgeted FTE	Budgeted Amount	Full Time Rate	Funding Edits Status		
UWMSN	534255	144	4	1362089	10.000	0.087500	7,967.000	\$79,664.000000	SFS Edits Passed	+	-
UWMSN	534253	144	4		47.000	0.411250	37,442.000	\$79,664.000000	SFS Edits Passed	+	-
UWMSN	348700	233	4	PRJ68AT	35.000	0.306250	27,882.000	\$79,664.000000	SFS Edits Passed	+	-
UWMSN	531200	144	4		8.000	0.070000	6,373.000	\$79,664.000000	SFS Edits Passed	+	-
Funding Totals:					100.000	0.875000	\$79,664.000				

- d. You may only make modifications to the funding strings that belong to your department/ division. For shared employees, this will likely leave the overall distribution percentage under or above 100% in the CAT. The CAT will allow you to save with this error and flag it both on the CAT page and in the record errors report. This will allow budget officers to easily identify discrepancies for shared employees and discuss how to correct the record together in order to clear the error report, as was past practice in the 3270 system.
9. Enter the desired GL Business Unit, Fund, Department, Program, Project and Distribution % for the funding row in the Funding Change table.
  - a. At the end of the budget cycle the sum of all Distribution % must equal 100%.
  - b. The Budgeted FTE = (distribution % on that split \* Total Planned FTE)
  - c. The Budgeted Amount = (Budgeted FTE \* Full Time Rate)
  - d. The Distribution % = (Budgeted FTE / Total Planned FTE)
  - e. Tabbing out of Budgeted FTE, Budgeted Amount or Distribution % should result in the other two fields populating.
  - f. The OK to Load to HRS Box can be check or unchecked.
    - a. If you want the funding to load to Commitment Accounting, check the OK to Load to HRS box.
    - b. If you do not want to load the funding to Commitment Accounting, uncheck the OK to Load to HRS box.
    - c. A funding string can be saved even if it does not pass standard SFS edits or CAT Budget edits but all funding strings will need to pass edits prior to the end of the budget cycle. (see OK to Load To HRS section on page 14 for more details)

Funding Change										Personalize   Find   View 3		First 1-4 of 4 Last	
GL Business Unit	Department	Fund	Program	Project	Distribution %	Budgeted FTE	Budgeted Amount	Full Time Rate	Funding Edits Status				
UWMSN	534255	144	4		10.000	0.100000	8,671.000	\$86,709.000000	SFS Edits Passed	+	-		
UWMSN	348700	144	4		47.000	0.470000	40,753.000	\$86,709.000000	SFS Edits Passed	+	-		
UWMSN	348700	233	4	PRJ68AT	35.000	0.350000	30,348.000	\$86,709.000000	SFS Edits Passed	+	-		
UWMSN	531250	233	4		8.000	0.080000	6,937.000	\$86,709.000000	SFS Edits Passed	+	-		
Funding Totals:					100.000	1.000000	\$86,709.000	<input type="checkbox"/> Ok to Load to HRS					
Last Update: 12/14/15 2:41:50PM by 01234567 Clay Mathews													

10. The bottom of the Funding Change section will display the totals for Distribution %, Budgeted Amount and Budgeted FTE.

Funding Change										Personalize   Find   View 3		First 1-4 of 4 Last	
GL Business Unit	Department	Fund	Program	Project	Distribution %	Budgeted FTE	Budgeted Amount	Full Time Rate	Funding Edits Status				
UWMSN	534255	144	4		10.000	0.100000	8,671.000	\$86,709.000000	SFS Edits Passed	+	-		
UWMSN	348700	144	4		47.000	0.470000	40,753.000	\$86,709.000000	SFS Edits Passed	+	-		
UWMSN	348700	233	4	PRJ68AT	35.000	0.350000	30,348.000	\$86,709.000000	SFS Edits Passed	+	-		
UWMSN	531250	233	4		8.000	0.080000	6,937.000	\$86,709.000000	SFS Edits Passed	+	-		
Funding Totals:					100.000	1.000000	\$86,709.000	<input type="checkbox"/> Ok to Load to HRS					
Last Update: 12/14/15 2:41:50PM by 01234567 Clay Mathews													

11. The Funding Change section defaults to display 3 funding splits.

a. To display all funding splits select “View All”.

Funding Change								Personalize   Find   <b>View All</b>            First 2-4 of 4   Last			
GL Business Unit	Department	Fund	Program	Project	Distribution %	Budgeted FTE	Budgeted Amount	Full Time Rate	Funding Edits Status		
UWMSN	348700	144	4		47.000	0.470000	40,753.000	\$86,709.000000	SFS Edits Passed		
UWMSN	348700	233	4	PRJ68AT	35.000	0.350000	30,348.000	\$86,709.000000	SFS Edits Passed		
UWMSN	531250	233	4		8.000	0.080000	6,937.000	\$86,709.000000	SFS Edits Passed		
Funding Totals:					100.000	1.000000	\$86,709.000	<input type="checkbox"/> Ok to Load to HRS			
Last Update: 12/14/15 2:41:50PM by 01234567 Clay Mathews											

12. Select Save to apply changes made to CAT record.

a. A time stamp will appear underneath the Funding Change Table displaying the Empl ID and Name of the last person to apply changes to it as well as the date and time that the changes occurred.

Funding Change										Personalize   Find   View All	First 2-4 of 4 Last		
GL Business Unit	Department	Fund	Program	Project	Distribution %	Budgeted FTE	Budgeted Amount	Full Time Rate	Funding Edits Status				
UWMSN	348700	144	4		47.000	0.470000	40,753.000	\$86,709.000000	SFS Edits Passed	+	-		
UWMSN	348700	233	4	PRJ68AT	35.000	0.350000	30,348.000	\$86,709.000000	SFS Edits Passed	+	-		
UWMSN	531250	233	4		8.000	0.080000	6,937.000	\$86,709.000000	SFS Edits Passed	+	-		
Funding Totals:					100.000	1.000000	\$86,709.000						
										<input type="checkbox"/> Ok to Load to HRS			
Last Update: 12/14/15 2:41:50PM by 01234567 Clay Mathews													
Comments:										Delete CAT Record			
										CAT Errors			
<input type="button" value="Save"/> <input type="button" value="Return to Search"/> <input type="button" value="Previous in List"/> <input type="button" value="Next in List"/> <input type="button" value="Refresh"/> <input type="button" value="Add"/> <input type="button" value="Update/Display"/>													

- b. The box labeled CAT Errors will be populated if errors are found on the page.
  - i. Depending on the type of error found a Compensation Change Section Error and/or Funding Change Section Error will populate within the box.
  - ii. Information on the CAT error types can be found in the **'CAT Page Error Descriptions and Messages Table'** on page 16. Errors will also be displayed on Record Errors Report.

CAT Errors
CAT Job Error(s) Found
CAT Funding Error(s) Found

- c. There is a comments box at the bottom of the CAT Page that can be used to keep notes about the particular employee record.
  - a. It is best practice for users to enter their initials and date after their comment followed by "//". This will be useful for separating and organizing comments.

Comments: Pending promotion. (CM) 12-17-15 //

## OK to Load to HRS and Funding Edits

If the OK to Load to HRS box is checked, the CAT tool will update Commitment Accounting funding data for the next fiscal year. The funding string must pass all SFS edits. In order to pass the SFS edits, the funding entered must be a valid combination of Department, Fund, Program, and Project. If a Project is entered, it must be open as of the beginning of the new fiscal year. (See chapter 6.15 for more information on Commitment Accounting)

If the OK to Load to HRS box is unchecked, the CAT funding data will not load to commitment accounting. The funding string will only run against the CAT budget edits. The funding data will only pass through to budget summary tables. CAT budget edits do not require an entry in the Project field even for funds that require projects (e.g. 144, 233, 150, etc.). If a project field is entered, it must be open as of the beginning of the new fiscal year.

Regardless of the box being checked or unchecked, by the end of the budget cycle, all Funding Edit statuses will need to pass funding edits.

1. The “Funding Edits Status” indicates whether a funding row has passed edits.

Funding Change										Personalize   Find   View 3	First 1-4 of 4 Last
GL Business Unit	Department	Fund	Program	Project	Distribution %	Budgeted FTE	Budgeted Amount	Full Time Rate	Funding Edits Status		
UWMSN	534255	144	4		10.000	0.100000	8,671.000	\$86,709.000000	SFS Edits Failed	+	-
UWMSN	348700	144	4		47.000	0.470000	40,753.000	\$86,709.000000	SFS Edits Failed	+	-
UWMSN	348700	233	4	PRJ68AT	35.000	0.350000	30,348.000	\$86,709.000000	SFS Edits Passed	+	-
UWMSN	531250	233	4		8.000	0.080000	6,937.000	\$86,709.000000	SFS Edits Failed	+	-
Funding Totals:					100.000	1.000000	\$86,709.000				
										<input checked="" type="checkbox"/> Ok to Load to HRS	

- a. SFS Edits Passed
    - i. Rows with status of “SFS Edits Passed” are valid funding combinations.
  - b. SFS Edits Failed
    - i. Rows with status of “SFS Edits Failed” will need to be corrected before budget lock. These rows will appear on the Record Errors Report until corrected.
2. After clicking Save on the CAT Page, funding rows that have been added/edited will be tested against the appropriate funding edits.

Comments:

Delete CAT Record

CAT Errors

Save

Return to Search

Previous in List

Next in List

Refresh

Add

Update/Display

## CAT Page Error Descriptions and Messages

The chart below outlines errors that can occur on the CAT Page. 'Hard' errors must be fixed before the page can be saved, while 'soft' errors can be saved on the CAT. An error message will populate the CAT Errors Box for these 'soft' errors.

CAT Page Error Descriptions and Messages				
Categorization (Error status)	CAT Page Warning Message	Error Description	Error type	When is error applied?
	Planned FTE Cannot be greater or less than 1	Planned FTE > 1 on one empl record	Hard	Upon tab
	Action reason ## occurs more than once. Please fix.	Action Reason has already been entered on the page	Hard	Upon tab
	Funding string " " occurs more than once. Please fix.	Identical funding split entered on page	Hard	Upon tab
	Budget Amount cannot be negative. Please fix.	Negative Budgeted Amount	Hard	Upon tab
	Adjustment amount needed	Action Reason without a dollar amount or %	Hard	Upon save
Funding Section Error	No funding has entered, salary will not add to summary totals	No Funding Information Entered in the CAT	Soft	Upon save
Job Level Error	Planned FTE = 0, Budgeted Amount will not count towards summary totals	Planned FTE = 0	Soft	Upon tab
Job Level Error	Planned FTE greater than one across multiple empl records.	Planned FTE > 1 on multiple empl records	Soft	Upon save
Job Level Error	Total Funding Distribution Percent must equal to 100%	Sum of Individual Budgeted FTEs <> Total Planned FTE	Soft	Upon save
Funding Section Error	Total Funding Distribution Percent must equal to 100%	Sum of Individual Budgeted amounts <> Final Comp Amount Adj for FTE	Soft	Upon save
Funding Section Error	Total Funding Distribution Percent must equal to 100%	Funding Distribution <> 100%	Soft	Upon save
Funding Section Error	Distribution Percentage, Budgeted FTE, or Budgeted Amount = 0 on a funding split	On an individual funding split, Distribution Percentage, Budgeted FTE, or Budgeted Amount = 0	Hard	Upon save
Funding Section Error	GLBU, Fund Code, Funding Department or Program Code is blank.	Partially Blank Funding String (Fund, DeptID, or Program are blank)	Soft	Upon Save
Compensation Section Error	Identical action reason exists in the CAT and in HRS.	Identical Action Reason exists in the CAT and in HRS (as of the effective date window you assign on the run control).	Soft	Upon save
Compensation Section Error	\$0 Compensation Change Amount entered	\$0 comp change amount entered	Hard	Upon tab
Compensation Section Error	Hourly Change amount must be >100\$ and <100\$. Please fix.	Hourly Jobs change amount < 100 and > -100	Hard	Upon tab