



January 23, 2019

MEMORANDUM

TO: Budget Officers
FROM: Jennifer Klippel
SUBJ: 2019-20 Compensation Administration Tool (CAT) and Planning and Budget Cloud Solution (PBCS) Availability

Access to the 2019-20 annual salary budget data is now available in the Compensation Administration Tool (CAT).

All active appointments for the employee classes below that were in HRS as of January 21, 2019 loaded to the CAT. These include:

- faculty,
- limited,
- academic staff with 9 or 12 month pay basis (excluding terminal continuity status lecturers and faculty assistants),
- permanent and project university staff, and
- employees-in-training (excluding post-doctoral and post-graduate trainees).

Please note: The allowable employee class types on the Additional Adjustment Page in CAT has been expanded from five categories to ten. This will align our budget categories with the way actual entries are posted in SFS and PBCS. Click here for more info: [AAP Changes for PlanUW](#).

News and Updates for the 2019-20 Budget Cycle

Beginning with 2019-20 budget development, we will enter non-salary budget data in the new Planning and Budgeting Cloud Solution Tool (PBCS) instead of the 3270 system. PBCS training sessions for Budget Officers and their staff have been occurring since mid-January and will continue through early February to help users get acclimated to the new system. Upon completion of the training session, users may begin their non-salary entry in the new tool.

Updated Madison Budget Office Primary Contact List

Ashley Folcik – *[Primary Contact for A07, A17, A18, A47, A54, A85, A88, A93]*

Andrew Johnson - [Primary Contact for A0208, A0220, A03, A05, A10, A19, A34, A53, A71]
Jennifer Klippel - [Primary Contact for A01, A0204, A0205, A0224, A0225, A0235, A0267, A63]

Ravi Rajani - [Primary Contact for A04, A12, A40, A80/A0280, A87]

Andy Taylor - [Primary Contact for A06, A37, A42, A45, A48, A52, A57, A77]

Susan Yun - [Primary Contact for A27, A46, A49, A56, A96]

Training for New and Existing Budget Officers

Training for PBCS has been scheduled with all divisions. If you believe you need training for the tool please contact your divisional budget officer. In addition, the MBO web site is in the process of being updated with training material and job aides that can be used to support data entry in the tool. There will also be open computer lab sessions on the following dates for you to attend to get assistance with entry and/or go over topics from training. Please contact Andy Taylor (andy.taylor@wisc.edu) if you would like to attend one of the time slots:

- February 14th from 9 – 12 p.m.
- February 20th from 9 – 12 p.m.
- February 27th from 9 – 4 p.m.
- February 28th from 9 - 4 p.m.

Questions about PBCS can also be directed to PlanUW-MSN-MBO@vc.wisc.edu or run through your MBO or AOA contact.

At this time, we do not plan to offer any large-scale CAT training sessions. We will provide training on an as needed basis. New budget officers should contact their primary Madison Budget Office contact to obtain necessary authorizations and schedule training. If needed, existing budget officers should contact their primary Budget Office contact to schedule refresher training.

Informational Reports

All CAT Reports are available at this time, including the Record Errors Report, HRS to CAT Compare Report, Missing from CAT Report, Under Min/ Over Max Report and CAT Position Report.

The Planning Allocation Reports and Allocated Compared to Budgeted Reports are available on the Madison Budget Office website. Please note that planning allocation updates are still in process. We will notify users when the initial planning allocation levels have been set and are ready for review.

The Allocated Compared to Budgeted Report is also available inside of PBCS however since CAT data is loaded to the system overnight (and not real time) tie out inside of PBCS would need to occur in the day following any changes to CAT.

Additionally, a report is being built inside of Planning Allocation to meet Divisional needs of having a real time view of CAT and AAP changes by replicating BSUM functionality. This report will allow divisions to run on demand salary information by Division, Department, DeptID (Sub department), Program Code, Fund and Project.

MADISON BUDGET OFFICE

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PBCS also delivers a number of reports to assist with your budget process. As you begin to use the tool please let us know if there is additional information that would be beneficial to support your business needs.

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