

6.17 – CAT Checkout Guide

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Purpose and Overview

This document serves as a guide for the salary planning and funding entry process using the Compensation Administration Tool. The technical instructions for utilizing the tool and running reports are located on the Madison Budget Office [Website](#).

Review Funding and Compensation for Employees Loaded to CAT

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.

Notes:

1. The Position Report provides a snap shot of current compensation and funding data enter in the CAT. This excel report can be used for reviewing data entry.

Enter all Vacant and Budget Adjustments in AAP

Enter all needed vacant positions, graduate assistant entries, LTE, student help and other lump sum values in the Additional Adjustments Page (AAP) within the CAT. Note:

Notes:

1. Graduate Assistants are not budgeted by individual and should be budgeted as a vacant entry in the AAP.

Review Report Outputs and Make Necessary Corrections

The CAT reports provide information to aid users in making updates within the CAT. Please review the reports and take appropriate actions. Not all records appearing on the CAT reports require action.

Required Actions – Anything listed as a required action must be corrected prior to budget checkout

Recommended Actions – Anything listed as recommended is at the discretion of the budget unit. Depending on the timing of the changes it may not be practical or prudent to make certain updates (Example: removing a terminated employee only to replace with an equivalent vacant position).

Record Errors Report

The Record Errors Report displays all records in the budget that have generated any sort of employee level error based on the edits that have been set up in the CAT. This report contains Job Level Errors, Compensation Section Errors, Funding Edit Errors, and Funding Section Errors.

Required Action Items:

1. **Funding errors** must be corrected.
2. **FTE > than 1** - No employee should be budgeted over 1 FTE. This may require coordination of multiple budget officers.
3. **Duplicate Compensation** rows must be corrected.

HRS to CAT Comparison Report

The HRS to CAT Comparison Report identifies employee records where key fields differ between the CAT and HRS, such as: Business Unit/Department change, Position Number change, Compensation Rate change, Empl Class Change, Title Change, Job Code Change and FTE change. This report also captures terminations.

Required Action Items:

1. **Position Number Changes** should be corrected. In many cases, the positions moved to another budgetary unit. The new position cannot be entered until the previously budgeted position is deleted from CAT.

Recommended Action Items:

1. **Remove terminated employees** throughout budget timeframe. During closeout (early April), it may not be practical or prudent to remove a terminated employee only to replace with an equivalent vacant position. This is especially true for units in high turnover areas (custodial).
2. **Update Job title changes** can be updated at the discretion of the budget unit.

Missing From CAT Report

This report allows users to identify new hires and ongoing staff who exist in HRS but were not included in the CAT at the time of data initialization. This report should be run after data initialization and regularly throughout the process until budget lock. *This report includes many staff types we do not budget by person at UW-Madison. Specific instructions for how to exclude all non-relevant staff are included in the report instructions. Contact your Primary Budget Office Contact with any questions.*

Recommended Action Items:

1. **Add new employees to CAT** throughout budget timeframe. During closeout (early April), it may not be practical or prudent to add new employee only to remove an equivalent vacant position. This is especially true for units in high turnover areas (custodial).
 - a. Please make a brief notation next to any records remaining on the report with the reason for exclusion from CAT and provide a copy of that to your MBO analyst at checkout.

Min/Max Report

This report displays employee records where an individual's (or a vacant's) updated budget salary is above maximum or below minimum of the rate for that title in HRS.

Required Action Items:

1. **Correct vacant positions** that appear on the report to ensure they fall within the job salary range

Note: The Madison Budget Office will work directly with Comp and Titling to correct any errors on by person Min/Max issues.

Other Miscellaneous CAT Errors

MBO Primary Analyst assigned to your unit will run the “Misc CAT Entry Errors” report from EPM CAT data views and provide an Excel output of changes to be made.

1. Ensure all “Okay to Load to HRS” checkboxes from the compensation change section are unchecked (box automatically checks when a placeholder rate change amount is entered).
2. Check that no dollars with decimal amounts were entered in the AAP.
3. Check that records do not contain a budget FTE of 0. The planned FTE may equal zero to reflect those on leave.
4. Ensure no hourly academic staff, LTEs, student help or graduate assistants have been entered into the budget by person.

Reconcile CAT Entries with Planning Allocation

Certain funds have allocated dollar amounts and FTE set for divisions in the Planning Allocation System. Divisions must balance their budget to the allocated dollars by major class (salaries and non-salaries). Divisions also must balance their budget to the allocation by program code, or complete a Reconciliation of Program Code Changes (Form 20) [as described in Chapter 5 of the MBO Budget Instructions].

Contact your Primary Budget Office Contact with any questions.

Funds that do not have specific FTE or dollar amounts set in the planning allocation system should be budgeted in accordance with divisional plans.

Program Revenue FTE Requests

Units requiring modification to authorized fund 128, 131 or 136 FTE levels should request changes through the Budget Office by submitting a completed request form, accompanied by a brief but descriptive narrative that provides an overview of the changes and how it will impact FTE levels. Approved requests will lead to an adjustment to your allocated FTE totals in the Planning Allocation System.

Instructions are located on the MBO [website](#).