



January 17, 2017

(Via E-Mail Only)

MEMORANDUM

TO: Budget Officers

FROM: Tim Norris

SUBJ: 2017-18 Compensation Administration Tool (CAT) and Non-Salary Budget Transaction Availability

Access to the 2017-18 annual salary budget data is now available in the Compensation Administration Tool (CAT). Non-salary budget data will be available in 3270, using the BDNS teleprocessing transaction, within the next week. At that time, budget summary data compiled from both systems will also be available in 3270 using the BSUM teleprocessing transaction.

All active appointments for the employee classes below that had commitment accounting funding entered in HRS 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).

The non-salary amounts will be initialized from the 2016-17 budget file.

News and Updates for the 2017-18 Budget Cycle

We are now entering our second year using the Compensation Administration Tool. This year's process will remain largely the same as last year. We planned on incorporating some enhancements identified while using the system last year but resources were unavailable due to the work needed to implement the upcoming HRS upgrade. In late February, the HRS 9.2 upgrade will be implemented. This will not change any functionality to the CAT or budget process but there will be some slight changes to the look of the CAT pages.

Updated Madison Budget Office Primary Contact List

Helen Schouten retired at the end of December after 44 years of service in the Madison Budget Office. The MBO is in the process of finding a replacement to fill her role. As a result, we reorganized the MBO Primary Contact List.

Ann Bourque - *[Primary Contact for A53, A63, A77, A93]*

Andrew Johnson - *[Primary Contact for A0220, A0225, A03, A04, A05, A06, A10, A17, A18, A27, A34, A40, A52, A56, A71, A85, A96]*

Jennifer Klippel - *[Primary Contact for A0110, A0205, A0224, A0267, A07, A12, A19, A37, A42, A45, A48, A49, A54, A57, A80, A87, A88]*

Training for New and Existing Budget Officers

At this time, we do not plan to offer any large-scale 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.

For Departmental Planning Spreadsheet (DPS) Users

There are a few minor changes to the 2017-18 DPS template. We added conditional formatting to all editable fields in the DPS. Now, all changes will be highlighted in light green to help identify updates made to employee funding or compensation fields. This will allow divisional admin to quickly view changes and make corresponding updates in the CAT. In implementing this change, we made some minor changes to the instructions for populating the DPS. **(Divisional CAT Admin: Please review CAT Technical Instructions Chapter 6.7 "Generation of the Departmental Planning Spreadsheet (DPS)")**

A new "CAT Pay Basis" field was added to the DPS. This field will not impact DPS users. The field only effects the underlying formulas built into the DPS. This field was added to address the FLSA changes that are now on hold.

Please contact Andrew Johnson (Andrew.Johnson@wisc.edu) with any questions on the DPS.

Informational Reports

The Planning Allocation Reports, Allocated Compared to Budgeted Reports, and Budget Summary Reports are available on the Madison Budget Office website. The Record Errors Report, HRS to CAT Compare Report, Missing from CAT Report, Under Min/ Over Max Report and CAT Position Report are available in the CAT.

CC: Laurent Heller

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