

6.15 - Data Load from CAT to Commitment Accounting and WISDM

- Updates Job and Compensation data loaded into HRS
- Runs annually, once an institution has completed all calculations and budget planning within the CAT

The image displays two screenshots of software interfaces and a process flow diagram. The top-left screenshot shows the 'Compensation and Funding Data' screen in HRS, with fields for Effective Date (06/28/2015), Planned FTE (1.000000), and Planned Title (IS DATA SERV SENIOR). It includes a table for 'Compensation Change' with columns for Action, Action Reason, Change Amount (\$), Change Percent (%), New Comp Rate, and New Annual Comp Rate Adjusted for FTE. The bottom-right screenshot shows the 'Compensation' screen in CAT, displaying details for an employee with Effective Date 06/28/2015, Action Pay Rt Chg, and Reason Merit. The bottom-left diagram illustrates the process flow: 'Departmental Planning Spreadsheet' feeds into 'LWCAT Compensation Administration Tool', which then feeds into 'HRS Human Resource System', which finally outputs an 'Initialization Report'.

Each year there is a fiscal year initialization process that pulls the funding entered into the budget for each individual and attempts to use that funding to create payroll coding for each person in the budget on 7/1 or start of the academic year. There is an established hierarchy for this process:

- If future dated funding (manually entered) exists in HRS for a given employee ID and employee record number, then the manually entered funding will remain in commitment accounting and the load from budget will be ignored
- If no future dated funding is manually entered in HRS for a given employee ID and employee record number, and all budget funding strings for the individual pass SFS edits, then the budget funding will load to commitment accounting
- If no future dated funding is manually entered in HRS for a given employee ID and employee record number, and any of the budget funding strings for the individual fails SFS edits, the load from budget will be ignored and prior year funding rolls over

This funding hierarchy will continue to apply to the load to commitment accounting from CAT, but with one important change. Users can now select or unselect a box below the funding section on each CAT record labeled "Okay to Load to HRS."

CAT Data Load to WISDM

Similar to past practice, after the budget development process is complete and the budget is locked, funding data is loaded from the budget summary to WISDM for all non-grant funding.