Compensation Administration Tool (CAT) and Additional Adjustments (AAP) Pages

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CAT Page

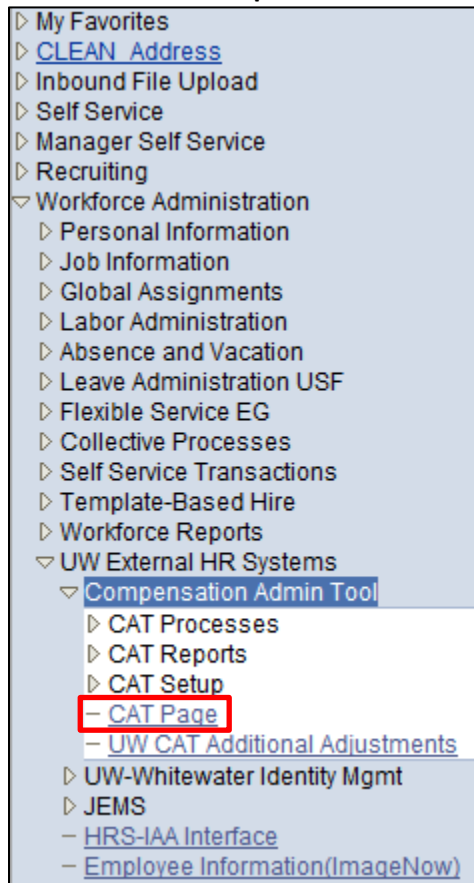# CAT Page

Purpose and Overview

The CAT Page supports the administration of rate and funding changes at the employee level for the upcoming fiscal year and allows the user to view and edit compensation and funding data on an employee basis. Mass updates to the CAT can be made through the Institutional Planning Spreadsheet Upload or manually on an employee-by-employee basis. The CAT interfaces to the current budget system and will transfer data to HRS HR and Commitment Accounting. The CAT page is divided into four sections, all of which will be covered in this KB Document:

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 update any changes (with the exception of position number) 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 automatically update when the HRS feed is on.

3. Compensation and Funding Data
    a. Compensation Change: This section allows the user of CAT to administer compensation increases either manually or through the mass IPS upload process.
    b. Funding Change: This section allows the user of CAT to administer funding changes either manually or through the mass IPS upload process.

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 record.
    a. To search for records already present in the CAT make sure "Find an Existing Value" is selected.
        i. Enter desired search criteria, such as Fiscal Year and Empl ID.

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

Fiscal Year:	=	▼	2016 🔍
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

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 should show all records from the CAT that match the selected criterion. A search using a combination of these fields should return the relevant records from the CAT for those criteria.
iv. Select the Hourglass located at the end of each field selection tab to display all possible input values for the corresponding field.
   1. For example, the hourglass 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

Field	Operator	Value
Fiscal Year:	=	2016 🔍
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

    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 records.
         2.   It will direct the user to the CAT page if the search criteria identifies one employee.

Search Results

View All   First ◄ 1-77 of 77 ► Last

Fiscal Year	Business Unit	HR Department	Funding Dept	Fund Code	Last Name	Name	Empl ID	Empl Rcd Nbr	Position Number	Employee Class
2016	UWEAU	C066800	(blank)	(blank)				0	00690311	FA
2016	UWEAU	C059000	(blank)	(blank)				1	01413793	AS
2016	UWEAU	C060200	(blank)	(blank)				0	00443417	CP
2016	UWEAU	C027600	(blank)	(blank)				0	02036509	CP
2016	UWEAU	C060200	(blank)	(blank)				1	00574044	LI
2016	UWEAU	C061100	(blank)	(blank)				0	00442405	FA
2016	UWEAU	C035000	(blank)	(blank)				0	00442073	AS
2016	UWEAU	C080500	(blank)	(blank)				0	00441725	FA

    b.   To add a new record select "Add a New Value" found at the top of the page.
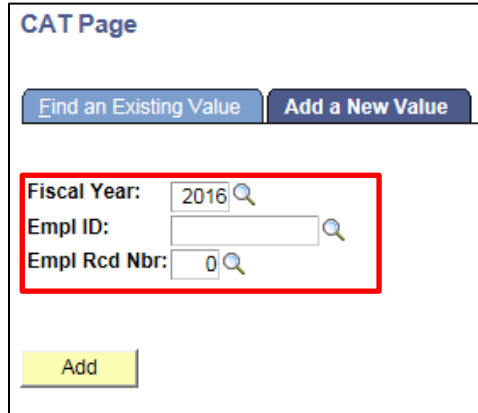
CAT Page

Find an Existing Value | **Add a New Value**

Field	Value
Fiscal Year:	2016 🔍
Empl ID:	🔍
Empl Rcd Nbr:	0 🔍
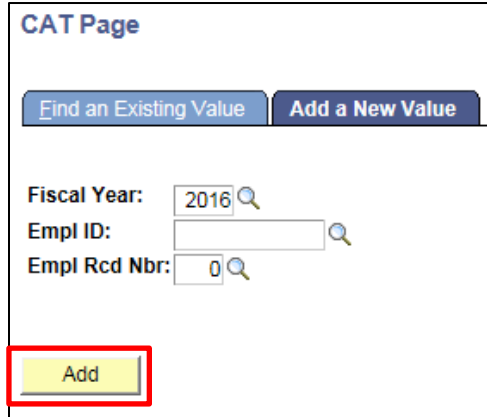
[Add]

i. 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: 2016
Empl ID:
Empl Rcd Nbr: 0

Add

ii. Select "Add" to create a new record.

CAT Page

Find an Existing Value | Add a New Value

Fiscal Year: 2016
Empl ID:
Empl Rcd Nbr: 0

Add

3. Select the desired record from the Search Results section

Compensation Administration Tool Page- Employee Attributes

4. The topmost section on the Employee Data Page is the Employee Attributes section.
   a. Displays basic job related attributes about the selected Employee Record/Job.
      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 Other Active Jobs?
   b. Contains links to the HRS Job Data Page (KB 18648), HRS Workforce Summary, and HRS Multiple Jobs Summary (KB 29424).
5. The HRS Live Feed syncs the values for the fields in this section nightly, to ensure that they are constantly updated to reflect the most recent values from Job Data.
      i. The exception to this is the Position Number, which cannot be changed for an employee record.

CAT Page						
Fiscal Year: 2016		**Business Unit:** UWEAU			**Empl Class:** FA Faculty	
Name:		**HRS Home Dept:** C050400 LIBRARY			**Pay Basis:** A Annual	
Empl ID:	**Rcd #:** 0	**Jobcode:** C20NN PROFESSOR			**Expected Job End Dt:**	
Position: 00550428		**Annual - Min:** $67,500.000 **Max:** $100,000,000.000			**Other Active Jobs?** N	

Useful Links: HRS Job Data Page   HRS Workforce Summary   HRS Multiple Jobs Summary

Recent and Future HR/Compensation Transactions

6. 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.
    a. Changes to FTE, Job Code, Title, Pay Rate, Pay Basis, EJED and Position Number will result in the job row with the corresponding change(s) to it appearing in this section as well as the job row immediately prior to the change(s) that occurred so that the change can be identified.
    b. Hires, Transfers, Terminations, Leave of Absence, Return from Leave and Short Work Break will appear as a single row in this section.
    c. 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   Personalize | Find | View All | 🔲 | 🎴   First ◀ 1 of 1 ▶ Last

Effective Date	Position Number	Job Code	Title	Action	Action Reason	FTE	Compensation Rate	Change Amount	Annual Comp Rate Adjusted for FTE
07/01/2014	00550428	C20NN	PROFESSOR	Pay Rt Chg	Merit	1.000000	77755.000000	770.000000	77755.000000

    d. The default for this section is to display the three most future dated transactions with the most future dated transaction at the top.
        i. Selecting "View All" will display all transactions meeting the criteria for this section within the last 18 months.

Recent and Future HR / Compensation Transactions   Personalize | Fin | View All | 🔲 | 🎴   First ◀ 1 of 1 ▶ Last

Effective Date	Position Number	Job Code	Title	Action	Action Reason	FTE	Compensation Rate	Change Amount	Annual Comp Rate Adjusted for FTE
07/01/2014	00550428	C20NN	PROFESSOR	Pay Rt Chg	Merit	1.000000	77755.000000	770.000000	77755.000000

▼ **Compensation Change**   Personalize | Find | View 3 | 🔲 | 🎴   First ◀ 1-4 of 4 ▶ Last

Action	Action Reason	Change Amount ($)	Change Percent (%)	New Comp Rate	New Annual Comp Rate Adjusted for FTE		
1 Pay Rate Change	002 - Reallocation ▾	100.000000	0.098	$102,062.000000	$102,062.000	➕	➖
2 Pay Rate Change	005 - Group Equity ▾	1,000.000000	0.980	$103,062.000000	$103,062.000	➕	➖
3 Pay Rate Change	050 - Anniversary adjustment ▾	155.000000	0.150	$103,217.000000	$103,217.000	➕	➖
4 Pay Rate Change	018 - Mandatory ▾	206.000000	0.200	$103,423.000000	$103,423.000	➕	➖

Compensation and Funding Data

7. Confirm/select values for "Planned FTE", "Planned Title" and "Add to Continuing Staff Basis" fields.
    a. "Planned FTE" is defaulted on each spreadsheet and in the CAT to the HRS FTE. It can be updated manually in the IPS or edited manually on the CAT Page.
        i. "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. The sum of the individual budgeted FTEs on each funding string in the Funding Section but equal the Total Planned FTE.

iii. Total Planned FTE cannot be greater than 1.

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

i. Can be edited manually on the CAT Page.

ii. The hourglass can be used to display all available HRS values for title.

c. "Add to Continuing Staff Basis" determines 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.

i. Any employee that is eligible for merit should have this box checked to be included in the CSB.

Compensation Change Section

8. Review the Compensation Change section to determine if all desired compensation changes are included and accurate.

a. The Compensation Change section by default displays three rows.

i. To view all previously entered increases select "View All".

	Action	Action Reason	Change Amount ($)	Change Percent (%)	New Comp Rate	New Annual Comp Rate Adjusted for FTE		
1	Pay Rate Change	019 - Merit	359.155000	0.500	$72,190.155000	$72,190.000	+	−
2	Pay Rate Change	067 - Chancellors Disc Incr.	50.000000	0.070	$72,240.155000	$72,240.000	+	−
3	Pay Rate Change	003 - Promotion/Progression	1,000.000000	1.392	$73,240.155000	$73,240.000	+	−
	Final Calculated Compensation as of Effective Date:		Comp Rate = $73,240.155		Annual Rate Adjusted for FTE = $73,240.000	Ok to Load to HRS		

	Action	Action Reason	Change Amount ($)	Change Percent (%)	New Comp Rate	New Annual Comp Rate Adjusted for FTE		
1	Pay Rate Change	002 - Reallocation	100.000000	0.098	$102,062.000000	$102,062.000	+	−
2	Pay Rate Change	005 - Group Equity	1,000.000000	0.980	$103,062.000000	$103,062.000	+	−
3	Pay Rate Change	050 - Anniversary adjustment	155.000000	0.150	$103,217.000000	$103,217.000	+	−
4	Pay Rate Change	018 - Mandatory	206.000000	0.200	$103,423.000000	$103,423.000	+	−

9. If all desired compensation changes are not included or accurate, edit/add a row.

a. To add a new row select the "+" located at the far right of the table.

i. When a new row is added the "Action Reason", "Change Amount" and "Change Percent" fields all default to blank. These fields can be edited.

ii.   When a new row is added the "Action" field will be populated automatically with PayRate Change as the value. This field is not editable.

	Action	Action Reason	Change Amount ($)	Change Percent (%)	New Comp Rate	New Annual Comp Rate Adjusted for FTE		
1	Pay Rate Change	019 - Merit	777.550000	0.120	$78,532.550000	$78,533.000	+	−
		Final Calculated Compensation as of Effective Date:	Comp Rate = $78,532.550		Annual Rate Adjusted for FTE = $78,533.000	☐ Ok to Load to HRS		

Compensation Change   Personalize | Find | View All | 🔲 | 🏢   First ◄ 1 of 1 ► Last
Last Update: 07/02/15 11:15:13AM by UW_IPS_LOAD

10. Enter the desired value 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. The Comprate Change Amount ($) field will ultimately be sent to HRS if OK to Load to HRS has been checked, and will affect an employee's comprate.

	Action	Action Reason	Change Amount ($)	Change Percent (%)	New Comp Rate	New Annual Comp Rate Adjusted for FTE		
1	Pay Rate Change	019 - Merit	777.550000	0.120	$78,532.550000	$78,533.000	+	−
		Final Calculated Compensation as of Effective Date:	Comp Rate = $78,532.550		Annual Rate Adjusted for FTE = $78,533.000	☐ Ok to Load to HRS		

Compensation Change   Personalize | Find | View All | 🔲 | 🏢   First ◄ 1 of 1 ► Last
Last Update: 07/02/15 11:15:13AM by UW_IPS_LOAD

11. Verify the rate increases have been applied in the correct order.
    a. The order that rate increases occur is determined by the Rate Calculation Type used or the preferences of each institution. Note that the CAT will continue to function correctly regardless of action reason order, and
       i. When using the "Off of Original Base" method, if included, merit should be applied first.

Compensation and Funding Data

Effective Date: 07/01/2015 — Planned FTE: 1.000000 — Redbook Title: RESEARCH PROG MGR III 🔍 — Automatic HRS Job Data Feed for this Empl Rcd: Active
Rate Calculation Type: Off of Original Base (IPS v1) — Comp Rate: 71831.000000 — 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	019 - Merit	359.155000	0.080	$72,190.155000	$72,190.000	+	−
2	Pay Rate Change	067 - Chancellors Disc Incr.	50.000000	0.011	$72,240.155000	$72,240.000	+	−
3	Pay Rate Change	018 - Mandatory	25.000000	0.035	$72,265.155000	$72,265.000	+	−
		Final Calculated Compensation as of Effective Date:	Comp Rate = $72,265.155		Annual Rate Adjusted for FTE = $72,265.000	☐ Ok to Load to HRS		

Compensation Change   Personalize | Find | View All | 🔲 | 🏢   First ◄ 1-3 of 3 ► Last
Last Update: 07/02/15 11:15:12AM by UW_IPS_LOAD

ii.   When using "Cumulative" method, merit should be applied last.

Compensation and Funding Data

| Effective Date: | 08/24/2015 | Planned FTE: | 1.000000 | Redbook Title: | PROFESSOR | | Automatic HRS Job Data Feed |
| Rate Calculation Type: | Cumulative (IPS v2) | Comp Rate: | 101962.000000 | Add Salary to Continuing Staff Base?: ☐ | | | for this Empl Rcd: Active |

▼ Compensation Change   Personalize | Find | View All | 🗗 | 🏭   First ◄ 2-4 of 4 ► Last

	Action	Action Reason	Change Amount ($)	Change Percent (%)	New Comp Rate	New Annual Comp Rate Adjusted for FTE		
2	Pay Rate Change	005 - Group Equity ▼	1,000.000000	0.980	$103,062.000000	$103,062.000	➕	➖
3	Pay Rate Change	067 - Chancellors Disc Incr. ▼	258.000000	0.250	$103,320.000000	$103,320.000	➕	➖
4	Pay Rate Change	019 - Merit ▼	1,031.000000	1.000	$104,351.000000	$104,351.000	➕	➖
	Final Calculated Compensation as of Effective Date:		Comp Rate = $104,351.000		Annual Rate Adjusted for FTE = $104,351.000		☐ Ok to Load to HRS	

Last Update: 07/02/15 4:16:50PM   by   00173821

b. The order of compensation changes will not adjust automatically, and the "+" button only inserts rows below existing entries. As a result existing entries might need to be deleted and re-added to ensure the correct order.

   a. For example, if a merit increase is needed for this 'Off of Original Base' employee:

      i. Delete Pay Rate Change 1 by pressing the "-" button

| Rate Calculation Type: Off of Original Base (IPS v1) | Comp Rate: 122236.000000 | Add Salary to Continuing Staff Base?: ☑ | for this Empl Rcd: Active |

▼ Compensation Change   Personalize | Find | View All | 🗗 | 🏭   First ◄ 1 of 1 ► Last

	Action	Action Reason	Change Amount ($)	Change Percent (%)	New Comp Rate	New Annual Comp Rate Adjusted for FTE		
1	Pay Rate Change	067 - Chancellors Disc Incr. ▼	1,223.000000	1.001	$123,459.000000	$123,459.000	➕	➖

      ii. Add the Merit increase by pressing the "+" button

| Rate Calculation Type: Off of Original Base (IPS v1) | Comp Rate: 122236.000000 | Add Salary to Continuing Staff Base?: ☑ | for this Empl Rcd: Active |

▼ Compensation Change   Personalize | Find | View All | 🗗 | 🏭   First ◄ 1 of 1 ► Last

	Action	Action Reason	Change Amount ($)	Change Percent (%)	New Comp Rate	New Annual Comp Rate Adjusted for FTE		
1	Pay Rate Change	019 - Merit ▼	1.000000	0.001	$122,237.000000	$122,237.000	➕	➖

      iii. Re-add the original Pay Rate Change by pressing the "+" button

| Rate Calculation Type: Off of Original Base (IPS v1) | Comp Rate: 122236.000000 | Add Salary to Continuing Staff Base?: ☑ | for this Empl Rcd: Active |

▼ Compensation Change   Personalize | Find | View All | 🗗 | 🏭   First ◄ 1-2 of 2 ► Last

	Action	Action Reason	Change Amount ($)	Change Percent (%)	New Comp Rate	New Annual Comp Rate Adjusted for FTE		
1	Pay Rate Change	019 - Merit ▼	1.000000	0.001	$122,237.000000	$122,237.000	➕	➖
2	Pay Rate Change	067 - Chancellors Disc Incr. ▼	1,223.000000	1.001	$123,460.000000	$123,460.000	➕	➖

   b. A similar process will be used for 'Cumulative' employees to ensure that Merit is listed last.

12. At the bottom of the Compensation Change section the Comprate (Annual Rate for A, C basis and Hourly Rate for H basis) and Annual Rate Adjusted for FTE (Budgeted Amount, or what the employee will actually get paid over the next fiscal year) will be automatically calculated.

▼ Compensation Change   Personalize | Find | View All | 🗗 | 🏭   First ◄ 2-4 of 4 ► Last

	Action	Action Reason	Change Amount ($)	Change Percent (%)	New Comp Rate	New Annual Comp Rate Adjusted for FTE		
2	Pay Rate Change	005 - Group Equity ▼	1,000.000000	0.980	$103,062.000000	$103,062.000	➕	➖
3	Pay Rate Change	067 - Chancellors Disc Incr. ▼	258.000000	0.250	$103,320.000000	$103,320.000	➕	➖
4	Pay Rate Change	019 - Merit ▼	1,031.000000	1.000	$104,351.000000	$104,351.000	➕	➖
	Final Calculated Compensation as of Effective Date:		Comp Rate = $104,351.000		Annual Rate Adjusted for FTE = $104,351.000		☐ Ok to Load to HRS	

Last Update: 07/02/15 4:16:50PM   by   00173821

13. Check or Uncheck "Ok to Load to HRS".

a. If the "Ok to Load to HRS" box is selected for the Compensation section, all entered rate increases will be loaded to HRS at the end of the Comp Admin cycle, and be effective as the first of the upcoming fiscal year.

	Action	Action Reason	Change Amount ($)	Change Percent (%)	New Comp Rate	New Annual Comp Rate Adjusted for FTE		
2	Pay Rate Change	005 - Group Equity	1,000.000000	0.980	$103,062.000000	$103,062.000	+	−
3	Pay Rate Change	067 - Chancellors Disc Incr.	258.000000	0.250	$103,320.000000	$103,320.000	+	−
4	Pay Rate Change	019 - Merit	1,031.000000	1.000	$104,351.000000	$104,351.000	+	−

Final Calculated Compensation as of Effective Date: Comp Rate = $104,351.000 Annual Rate Adjusted for FTE = $104,351.000 ☑ Ok to Load to HRS

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14. An audit stamp will appear underneath 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.

	Action	Action Reason	Change Amount ($)	Change Percent (%)	New Comp Rate	New Annual Comp Rate Adjusted for FTE		
2	Pay Rate Change	005 - Group Equity	1,000.000000	0.980	$103,062.000000	$103,062.000	+	−
3	Pay Rate Change	067 - Chancellors Disc Incr.	258.000000	0.250	$103,320.000000	$103,320.000	+	−
4	Pay Rate Change	019 - Merit	1,031.000000	1.000	$104,351.000000	$104,351.000	+	−

Final Calculated Compensation as of Effective Date: Comp Rate = $104,351.000 Annual Rate Adjusted for FTE = $104,351.000 ☐ Ok to Load to HRS

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Funding Change Section

15. The rows in the Funding Change section can either be populated from the IPS Upload process or entered manually.
    a. To enter rows manually select "+" to add a new row.

GL Business Unit	Fund	Department	Program	Project	Distribution %	Budgeted FTE	Budgeted Amount	Full Time Rate	Funding Edits Status		
UWMSN	101	062000	2		20.000	0.200000	20,870.000	$104,351.000000	SFS Edits Failed	+	−
UWMSN	101	062000	1		0.000	0.000000	0.000	$104,351.000000	SFS Edits Failed	+	−

Funding Totals: 20.000 0.200000 $20,870.000 ☐ Ok to Load to HRS

b. When a new row is added in the Funding Change Table all fields populate as blank.

16. Select the desired "GL Business Unit", "Fund", "Department", "Program", "Project" and "Distribution %" for the funding row in the Funding Change table.
    a. Total Distribution % must equal 100%.
    b. Budgeted FTE = distribution % on that split * Total Planned FTE
    c. Budgeted Amount is calculated by Budgeted FTE * Full Time Rate
    d. Distribution % = Budgeted FTE * Total Planned FTE
        a. If OK to Load to HRS is checked, each funding string and its Distribution % field will be passed from the CAT to HRS.
    e. Tabbing out of Budgeted FTE, Budgeted Amount or Distribution % should result in the other two fields populating.
    f. A funding string can be saved even if it does not pass standard SFS edits or SFS Budget edits.

Funding Change											
GL Business Unit	Fund	Department	Program	Project	Distribution %	Budgeted FTE	Budgeted Amount	Full Time Rate	Funding Edits Status		
UWMSN	101	062000	2		20.000	0.200000	20,870.000	$104,351.000000	SFS Edits Failed	+	−
UWMSN	101	062000	1		0.000	0.000000	0.000	$104,351.000000	SFS Edits Failed	+	−
				Funding Totals:	20.000	0.200000	$20,870.000			Ok to Load to HRS	

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

Funding Change											
GL Business Unit	Fund	Department	Program	Project	Distribution %	Budgeted FTE	Budgeted Amount	Full Time Rate	Funding Edits Status		
UWMSN	101	062000	2		20.000	0.200000	20,870.000	$104,351.000000	SFS Edits Failed	+	−
UWMSN	101	062000	1		0.000	0.000000	0.000	$104,351.000000	SFS Edits Failed	+	−
				Funding Totals:	20.000	0.200000	$20,870.000			Ok to Load to HRS	

18. The Funding Change section defaults to display 3 funding splits.
    a. To display all previously entered funding splits select "View All".

Funding Change											
GL Business Unit	Fund	Department	Program	Project	Distribution %	Budgeted FTE	Budgeted Amount	Full Time Rate	Funding Edits Status		
UWEAU	101	481000	2		25.000	0.250000	18,310.000	$73,240.000000	SFS Edits Unverified	+	−
				Funding Totals:	25.000	0.250000	$18,310.000			Ok to Load to HRS	

Funding Change											
GL Business Unit	Fund	Department	Program	Project	Distribution %	Budgeted FTE	Budgeted Amount	Full Time Rate	Funding Edits Status		
UWEAU	101	481000	2		25.000	0.250000	18,310.000	$73,240.000000	SFS Edits Unverified	+	−
					25.000	0.250000	18,310.000	$73,240.000000	SFS Edits Unverified	+	−
					25.000	0.250000	18,310.000	$73,240.000000	SFS Edits Unverified	+	−
					25.000	0.250000	18,310.000	$73,240.000000	SFS Edits Unverified	+	−

19. Select "Save" to apply changes made to CAT Page.
    a. A time stamp should 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											
GL Business Unit	Fund	Department	Program	Project	Distribution %	Budgeted FTE	Budgeted Amount	Full Time Rate	Funding Edits Status		
UWMSN	101	062000	2		20.000	0.200000	20,870.000	$104,351.000000	SFS Edits Failed	+	−
UWMSN	101	062000	1		0.000	0.000000	0.000	$104,351.000000	SFS Edits Failed	+	−
				Funding Totals:	20.000	0.200000	$20,870.000			Ok to Load to HRS	

Last Update: 07/07/15 12:33:45PM   by 00173821   (TONY   )

    b. The Box labeled "CAT Errors" will be populated if errors are found on the page.
        i. Depending on the type of error found either Compensation Change Section Error 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'** at the end of this KB.

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. Comments made in the IPS will also be loaded into this box.

        a. It is best practice for users to enter their name, initials, or emplid after their comment followed by "///". This will be useful for separating and organizing comments.

        b. Two examples can be seen below:

Comments: Shared employee. (ES) ///

Comments: 08/05/15 Employee on Leave - not budgeted (ES) ///

CAT Page

Fiscal Year:	2016		Business Unit:	UWMSN		Empl Class:	FA	Faculty
Name:			HRS Home Dept:	A486700	L&S/PHYSICS/PHYSICS	Pay Basis:	C	Academic
Empl ID:		Rcd #: 0	Jobcode:	C20NN	PROFESSOR	Expected Job End Dt:		
Position:	00000016		Annual - Min:	$59,684.000	Max: $100,000,000.000	Other Active Jobs?:	N	

Useful Links: HRS Job Data Page   HRS Workforce Summary   HRS Multiple Jobs Summary

Recent and Future HR / Compensation Transactions   Personalize | Find | View All | | First 1-3 of 3 Last

Effective Date	Position Number	Job Code	Title	Action	Action Reason	FTE	Compensation Rate	Change Amount	Annual Comp Rate Adjusted for FTE
08/25/2014	00000016	C20NN	PROFESSOR	Pay Rt Chg	Merit	1.000000	101962.000000	1010.000000	101962.000000
08/25/2014	00000016	C20NN	PROFESSOR	Return from RBK	Start Academic Year	1.000000	100952.000000		100952.000000
08/25/2014	00000016	C20NN	PROFESSOR	Pay Rt Chg	MSN Compression-Equity Fund	1.000000	100952.000000	8614.000000	100952.000000

Compensation and Funding Data

| Effective Date: | 08/24/2015 | Planned FTE: | 1.000000 | Redbook Title: | PROFESSOR | | Automatic HRS Job Data Feed |
| Rate Calculation Type: | Cumulative (IPS v2) | Comp Rate: | 101962.000000 | Add Salary to Continuing Staff Base?: ☐ | | | for this Empl Rcd: **Active** |

▼ Compensation Change   Personalize | Find | View All | | First 1-2 of 2 Last

	Action	Action Reason	Change Amount ($)	Change Percent (%)	New Comp Rate	New Annual Comp Rate Adjusted for FTE		
1	Pay Rate Change	002 - Reallocation	100.000000	0.098	$102,062.000000	$102,062.000	+	−
2	Pay Rate Change	005 - Group Equity	1,000.000000	0.980	$103,062.000000	$103,062.000	+	−

| | Final Calculated Compensation as of Effective Date: | Comp Rate = $103,062.000 | Annual Rate Adjusted for FTE = $103,062.000 | ☐ Ok to Load to HRS |

Last Update: 07/02/15 4:16:50PM by 00173821

▼ Funding Change   Personalize | Find | View All | | First 1-2 of 2 Last

GL Business Unit	Fund	Department	Program	Project	Distribution %	Budgeted FTE	Budgeted Amount	Full Time Rate	Funding Edits Status		
UWMSN	101	062000	2		20.000	0.200000	20,612.000	$103,062.000000	SFS Edits Failed	+	−
UWMSN	101	062000	1		0.000	0.000000	0.000	$103,062.000000	SFS Edits Failed	+	−

| | Funding Totals: | 20.000 | 0.200000 | $20,612.000 | | ☐ Ok to Load to HRS |

Last Update: 07/07/15 12:33:45PM by 00173821

Comments: ☐

Delete CAT Record

CAT Errors

CAT Job Error(s) Found

CAT Funding Error(s) Found

Save | Return to Search | Previous in List | Next in List | Refresh   Add | Update/Display

Funding Edits

1. The "Funding Edits Status" indicates whether a funding row has passed SFS edits. On a nightly basis a process will run that checks all funding rows with a status of "U" for validity against SFS chartfield and combination edits. The three Funding Edits Statuses are:
    a. U=Unverified
        i. All funding rows added during the IPS Upload process will be set to status of "U".
        ii. Funding rows with status of "U" will be tested nightly against SFS chartfield and combination edits.
    b. E=Error-Failed Edits
        i. Rows with status of "U" that fail the test against SFS chartfield and combination edits will be set to Funding Edits Status of "E".
    c. P=Passed Edits
        i. Rows with status of "U" that pass the test against SFS chartfield and combination edits will be set to Funding Edits Status of "P".
2. When "save" is selected on the CAT Page funding rows that have been added will be tested against SFS chartfield and combination edits. In addition rows that already exist on the page with a status of "U" or "E" will be tested as well in case the error has been corrected.
        i. The Funding Edits Status, for all funding rows tested when the page is saved, will be updated to reflect any changes that have occurred.
    b. The CAT Page should be able to save with funding row errors, but the following fields should be highlighted in red for the funding row in error:
        i. GL Business Unit
        ii. Fund
        iii. DeptID
        iv. Program
        v. Project

Complex Scenarios

1. Budgeted Leave of Absence in the CAT
    a. It is necessary for budgeting purposes to indicate if an employee is on leave. The salary of an employee on leave should not be charged to their department's budget.
    b. To budget for an employee on leave enter 0.0 for the budgeted FTE field.
        i. This will result in $0 transferring back to the budget system.
    c. Use the comments field to indicate that the employee is on leave.

CAT Page

Fiscal Year: 2016
Name:
Empl ID: Rcd #:   0
Position: 02079855

Business Unit: UWMSN
HRS Home Dept: A011020   GEA/UNIVERSITY ADMIN/PROVOST
Jobcode: A44NN   ASST VICE CHANCELLOR

Empl Class: LI   Limited
Pay Basis: A   Annual
Expected Job End Dt:
Other Active Jobs?   Y

Enter 0 for Planned FTE so $0.0 transfers to the Budget System.

Recent and Future HR / Compensation Transactions — Personalize | Find | View All | First 1 of 1 Last

Effective Date	Position Number	Job Code	Title	FTE	Compensation Rate	Change Amount	Annual Comp Rate Adjusted for FTE
07/01/2014	02079855	A44NN	ASST VICE CHANCELLOR	1.000000	101000.000000	1000.000000	101000.000000

Compensation and Funding Data

Effective Date: 07/01/2015   Planned FTE: 0.000000   Planned Title: ASST VICE CHANCELLOR
Rate Calculation Type: Cumulative (IPS v2)   Comp Rate: 101000.000000   Add Salary to Continuing Staff Base?: ☑

Automatic HRS Job Data Feed for this Empl Rcd: Active

Compensation Change — Personalize | Find | View All | First 1 of 1 Last

	Action	Action Reason	Change Amount ($)	Change Percent (%)	New Comp Rate	New Annual Comp Rate Adjusted for FTE		
1	Pay Rate Change	019 - Merit	1,010.000000	1.000	$102,010.000000	$0.000	+	−

Final Calculated Compensation as of Effective Date: Comp Rate = $102,010.000   Annual Rate Adjusted for FTE = $0.000   ☑ Ok to Load to HRS

Last Update: 09/21/15 4:22:32PM by 00833917

Funding Change — Personalize | Find | View All | First 1 of 1 Last

GL Business Unit	Fund	Department	Progr				Budgeted Amount	Full Time Rate	Funding Edits Status		
UWMSN	101	011020	1			.000	0.000	$0.000000	SFS Edits Passed	+	−

Use the Comments field to indicate the employee is on leave

.000 $0.000   ☑ Ok to Load to HRS

Last Update: 09/21/15 4:22:32PM by 00833917

Comments: 08/05/15 Employee on Leave - not budgeted (ES)///

CAT Errors

Delete CAT Record

Save   Return to Search   Previous In List   Next In List   Refresh   Add   Update/Display

CAT Page Field Descriptions

The chart below outlines the fields on the CAT Page.

Employee Attributes		
Field	**Stored In (If Applicable)**	**Description/Notes**
FISCAL YEAR	CAT	Set on IPS upload run control, or entered manually when adding a value. Does not load anywhere from this table
NAME	HRS	First and Last name from HRS for a given emplrcd
EMPL ID	CAT	Loaded from IPS. Loads to HRS
RCD #	CAT	Loaded from IPS. Loads to HRS
POSITION	CAT	Loaded from IPS. Loads to HRS
BUSINESS UNIT	CAT	Loaded from IPS. Loads to HRS for funding info
HRS HOME DEPT	CAT	Pulled from HRS based on position
JOBCODE	HRS	JobCode from HRS for a given emplrcd.
ANNUAL MIN	HRS	Annual Min from HRS
ANNUAL MAX	HRS	Annual Max from HRS

EMPL CLASS	HRS	Empl Class from HRS for a given emplrcd
PAY BASIS	HRS	Pay Basis from HRS for a given emplrcd.
EXPECTED JOB END DATE	HRS	EJED from HRS for a given emplrcd.
OTHER ACTIVE JOBS?	HRS	Other Active jobs from HRS.

Recent and Future HR / Compensation Transactions		
Field	**Stored In (If Applicable)**	**Description/Notes**
EFFECTIVE DATE	CAT	Set automatically on the table based on the Fiscal Year entered, and Business Unit and Session Code from Job. Loads to HRS
POSITION NUMBER	CAT	Loaded from IPS. Loads to HRS
JOBCODE	HRS	JobCode from HRS for a given emplrcd.
TITLE	CAT	Pulled from HRS based on position number.
ACTION	CAT	Set by IPS load program (should always be PAY), will load to PS_JOB
ACTION REASON	CAT	User defined selected from active Reason Codes, will load to PS_JOB
FTE		
COMPENSATION RATE	CAT	Employee's comprate in HRS as of the specified effective date on the CAT record will be stored here.
CHANGE AMOUNT	CAT	Loaded from IPS. User defined, will load to PS_COMPENSATION
ANNUAL COMP RATE ADJUSTED FOR FTE		

Compensation and Funding Data		
Field	**Stored In (If Applicable)**	**Description/Notes**
EFFECTIVE DATE	CAT	Set automatically on the table based on the Fiscal Year entered, and Business Unit and Session Code from Job. Loads to HRS
PLANNED FTE	New Field	Loaded from IPS. Does not load anywhere from this table. Annual Comp Adj. for FTE calculates off of this
PLANNED TITLE	CAT	Defaults to the value of the Job Code/Title in the header, but is editable. Does not load anywhere.
RATE CALCULATION TYPE	New Field	Controlled by configuration and drives behavior of the Comp calculations. Does not load anywhere.

COMP RATE	CAT	Employee's comprate in HRS as of the specified effective date on the CAT record will be stored here.
CONTINUING BASE?	New Field	Loaded from IPS or set manually. Determines whether salary totals will load to summaries elsewhere in CAT
Automatic HRS feed		Displays whether the automatic feed between HRS and the CAT is Active or not.

Compensation Change/Notes		
Field	**Stored In (If Applicable)**	**Description/Notes**
ACTION	CAT	Set by IPS load program (should always be PAY), will load to PS_JOB
ACTION REASON	CAT	User defined selected from active Reason Codes, will load to PS_JOB
CHANGE AMOUNT	CAT	Loaded from IPS. User defined, will load to PS_COMPENSATION
CHANGE PERCENTAGE	CAT	Manually entered or loaded from IPS. Does not load to HRS but may be used in calculating change amount.
NEW COMP RATE	HRS	Not loaded from IPS, but calculated by the load process. Equals Comp Rate from HRS + Change Amount. The Max Ordered/Sequenced row for an employee record will be the Total Comp Rate as off the effective date on the CAT record
NEW ANNUAL COMP RATE ADJUSTED FOR FTE	HRS	Not loaded from IPS, but calculated by the load process.
LOAD TO HRS?	New Field	Indicates whether these changes will load to HRS
Timestamp (LASTUPDDTTM)		Marks date and time most recent update to this table
OprID (LASTUPDOPRID)		Indicates most recent process or user to update this table

Funding Change		
Field	**Stored In (If Applicable)**	**Description/Notes**
GL BUSINESS UNIT	CAT	Loaded from IPS or entered manually. Parsed out from the Account Code field on PS_DEPT_BUDGET_ERN and loads back to that table. Loads to Budget
FUND	CAT	Loaded from IPS or entered manually. Parsed out from the Account Code field on PS_DEPT_BUDGET_ERN and loads back to that table. Loads to Budget
DEPARTMENT	CAT	Loaded from IPS or entered manually. Parsed out from the Account Code field on PS_DEPT_BUDGET_ERN and loads back to that table. Loads to Budget

PROGRAM	CAT	Loaded from IPS or entered manually. Parsed out from the Account Code field on PS_DEPT_BUDGET_ERN and loads back to that table. Loads to Budget
PROJECT	CAT	Loaded from IPS or entered manually. Parsed out from the Account Code field on PS_DEPT_BUDGET_ERN and loads back to that table (optional field). Loads to Budget
DISTRIBUTION %	CAT	Loaded from IPS and loads to HRS through the budget system
BUDGETED FTE	New Field	Loaded from IPS or entered manually. Loads to Budget
BUDGETED AMOUNT	New Field	Loaded from IPS. Loads to Budget.
FULL TIME RATE	HRS	Calculated automatically
FUNDING EDITS STATUS	HRS	Indicates whether or not each funding row has passed SFS edits
COMMENTS	New Field	Free form field allowing for entry of HR and Budget staff comments about this record. 300 characters
CAT ERRORS	New Field	Indicates whether the employee's record contains any Compensation Errors, Funding Errors, or both

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				
Error Description	Categorization (Error status)	Error type	When is error applied?	CAT Page Warning Message
Planned FTE > 1 on one empl record		Hard	Upon tab	Planned FTE Cannot be greater or less than 1
Action Reason has already been entered on the page		Hard	Upon tab	Action reason ## occurs more than once. Please fix.
Identical funding split entered on page		Hard	Upon tab	Funding string " " occurs more than once. Please fix.
Negative Budgeted Amount		Hard	Upon tab	Budget Amount cannot be negative. Please fix.
Action Reason without a dollar amount or %		Hard	Upon save	Adjustment amount needed

No Funding Information Entered in the CAT	Funding Section Error	Soft	Upon save	No funding has entered, salary will not add to summary totals
Planned FTE = 0	Job Level Error	Soft	Upon tab	Planned FTE = 0, Budgeted Amount will not count towards summary totals
Planned Fte > 1 on multiple empl records	Job Level Error	Soft	Upon save	Planned FTE greater than one across multiple empl records.
Sum of Individual Budgeted FTEs <> Total Planned FTE	Job Level Error	Soft	Upon save	Total Funding Distribution Percent must equal to 100%
Sum of Individual Budgeted amounts <> Final Comp Amount Adj for FTE	Funding Section Error	Soft	Upon save	Total Funding Distribution Percent must equal to 100%
Funding Distribution <> 100%	Funding Section Error	Soft	Upon save	Total Funding Distribution Percent must equal to 100%
On an individual funding split, Distribution Percentage, Budgeted FTE, or Budgeted Amount = 0	Funding Section Error	Hard	Upon save	Distribution Percentage, Budgeted FTE, or Budgeted Amount = 0 on a funding split
Partially Blank Funding String (Fund, DeptID, or Program are blank)	Funding Section Error	Soft	Upon Save	GLBU, Fund Code, Funding Department or Program Code is blank.
Identical Action Reason exists in the CAT and in HRS (as of the effective date window you assign on the run control).	Compensation Section Error	Soft	Upon save	Identical action reason exists in the CAT and in HRS.
$0 comp change amount entered	Compensation Section Error	Hard	Upon tab	$0 Compensation Change Amount entered
Hourly Jobs change amount < 100 and > -100	Compensation Section Error	Hard	Upon tab	Hourly Change amount must be >100$ and <100$. Please fix.

Additional Adjustments Page

Purpose and Overview

The Additional Adjustment Page (AAP) supports UW institutions and divisions in the planning and budgeting of Group, Lump, Vacant, and Negative positions throughout the compensation administration process. It contains two sections for users to enter positions in: Vacant Positions and Other Budget Adjustments (formerly Group, Lump, and Negative positions). Each Funding Department has a unique page in the AAP. The AAP interfaces to the current budget system, but does not transfer data to HRS.

This page is to be used as a reconciling tool. The data on this page will pass back to the Budget Summary Report, the CAT summary report and BSUM. It will not interface with HRS.

Procedure Steps

The AAP can be used strictly as an online tool or can be used after the Additional Adjustments tab of the IPS has been uploaded to the AAP. For more information on this process, reference KB 07-08.

1. Navigate to the AAP
   a. Log in to HRS and navigate to Workforce Administration > UW External HR Systems > Compensation Admin Tool > UW CAT Additional Adjustments (shown in the images below).
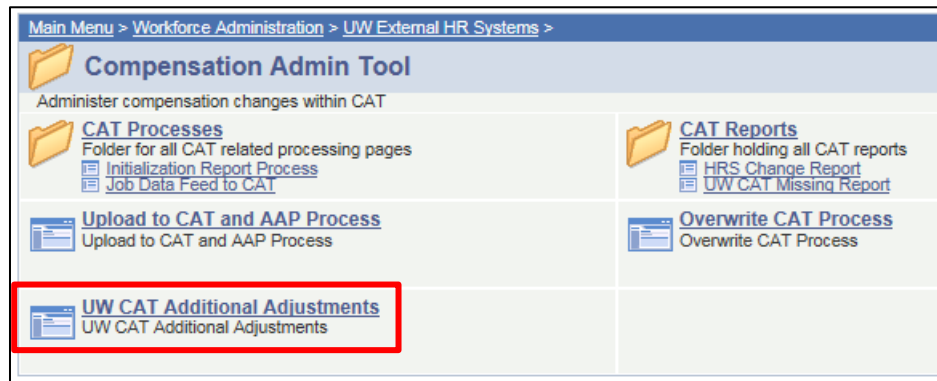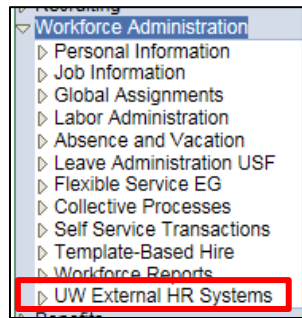
2. Look up a Funding Department already present in the AAP, or add a new Funding Department.
   a. To look up records, make sure the "Find an Existing Value" tab at the top is selected. Enter the desired search criteria.
      i. Leaving a field blank will include all the possible values for that field in the search.
      ii. Click the magnifying glass symbol next to any field to search for possible values.
      iii. Click "Search" to find results.
      iv. If no results appear for the desired search criteria, it is possible to add new Funding Departments by clicking the "Add a New Value" tab at the top. The fields will be pre-populated with the search criteria. Click "Add" to create a new

Funding Department.

b. To add new Funding Department, make sure the "Add a New Value" tab at the top is selected. Enter the new information.
    i. Note that all fields must be filled in.
    ii. Click "Add" to create a new Funding Department.

3. If desired, add information to the Vacant Position section.
    a. If a blank row is not yet available, click the "+" button on the right side of the table. This will add a blank row to the Vacant Positions section.

	*JOB CODE	TITLE	PAY BASIS	POSITION NUMBER	*ADJ TYPE	FTE	*FUND	DEPTID	*PROGRAM	PROJECT	FULL TIME BASE	BUDGETED AMOUNT	DESCRIPTION		
1	06301	MARKETING SPEC	C	00000009	LI/FA/AS	2.00	109	487640	5		$250000.000	$500000.000	dddd	+	−

b. Enter the Vacant Position information. The table below outlines the different fields.
    i. Fields with a magnifying glass icon 🔍 indicate that it is possible to search for values. Click the magnifying glass icon to bring up the search window.

ii. Note that if a vacant position is split funded, it will require one row for each funding string.

Table 1: Vacant Position Field Descriptions		
Field Name	Entry Method	Description
JOB CODE	User-entered (search available)	The job code for the vacant position. This is a mandatory field for vacant positions. If you do not know the job code for the vacant position you wish to hold, you may enter the budgeted amount in the Other Budget Adjustments table.
TITLE	Auto-populated	The job title for the vacant position. This field is automatically populated based on the job code selected.
PAY BASIS	User-entered (search available)	The pay basis for the vacant position. *Note:* This field is optional.
POSITION NUMBER	User-entered (search available)	The position number for the vacant position. *Note:* This field is optional.
ADJ TYPE	User-entered (drop down available)	The adjustment type for the vacant position. This is used to categorize the position for budget summary and Redbook reporting purposes.
FTE	User-entered	The FTE for the vacant position. *Note:* LTE and SH adjustment types cannot have an FTE value entered. FTE must be entered for all other types of vacant positions.
FUND	User-entered (search available)	The fund code for the vacant position.
DEPTID	Auto-populated	The department ID for the funding department for the vacant position. All adjustments made on the same page will have the same funding department, so this value will be defaulted.
PROGRAM	User-entered (search available)	The program code for the vacant position.
PROJECT	User-entered	The project ID for the vacant position. *Note*: This field is optional.
FULL TIME BASE	User-entered/ auto-calculated	The annual base salary for the vacant position, as if 1 FTE. If a new budgeted amount is entered, the full time base will recalculate based on the formula (budgeted amount / FTE). *Note:* LTE and SH adjustment types cannot have a full time base value entered.
BUDGETED AMOUNT	User-entered/	The budgeted amount for the vacant position, adjusted for FTE. If a new full time base is entered, the budgeted amount will recalculate

	auto-calculated	based on the formula (full time base * FTE). *Note*: The budgeted amount will not recalculate based on full time base for LTE and SH adjustment types.
DESCRIPTION	User-entered	This field can be used for a variety of notes to describe the position. *Note:* This field is optional.

4. If desired, add information to the Other Budget Adjustments section (formerly Group, Lump, and Negative Positions).
   a. If a blank row is not yet available, click the "+" button on the right side of the table.

   b. Enter the Other Budget Adjustments information. The table below outlines the different fields.
      i. Fields with a magnifying glass icon 🔍 indicate that it is possible to search for values. Click the magnifying glass icon to bring up the search window.
   c. If an existing FTE or Budgeted Amount needs to be changed to a negative value, the row with the old value must be deleted, and a new row with the negative value must be added.
      i. Rows can be deleted by clicking the "-" sign next to the row.
   d. Take note of any SFS Edit Error pop-up message(s), as these records will not be saved until a valid funding string combination is used for the given adjustment row.

Table 2: Budget Adjustment Field Descriptions		
Field Name	Entry Method	Description
ADJ TYPE	User-entered (drop down available)	The adjustment type for any other budget adjustment (could be group positions, lump sum positions, negative FTE or budget entries).
FTE	User-entered	The FTE for the other budget adjustment. This value can be negative if necessary. *Note:* LTE and SH adjustment types cannot have an FTE value entered. This field is optional for the other adjustment types.
FUND	User-entered (search available)	The fund code for the other budget adjustment.
DEPTID	Auto-populated	The department ID for the funding department for the other budget adjustment. All adjustments made on the same page will have the same funding department.
PROGRAM	User-entered (search available)	The program code for the other budget adjustment.
PROJECT	User-entered	The project ID for the other budget adjustment. *Note*: This field is optional.

FULL TIME BASE	User-entered/ auto-calculated	The base salary for the other budget adjustment, as if 1 FTE. If a new budgeted amount is entered, the full time base will recalculate based on the formula (budgeted amount / FTE). *Note:* LTE and SH adjustment types cannot have a full time base value entered.
BUDGETED AMOUNT	User-entered/ auto-calculated	The budgeted amount for the other budget adjustment, adjusted for FTE. If a new full time base is entered, the budgeted amount will recalculate based on the formula (full time base * FTE). This value can be negative if necessary. *Note*: The budgeted amount will not recalculate based on full time base for LTE and SH adjustment types.
DESCRIPTION	User-entered	This field can be used for a variety of notes. It may be helpful to note whether the position is group, lump, or negative in this field. *Note:* This field is optional.