**Compensation Administration Tool (CAT)**

**Management of Funding Edits
October 2015**

**CAT Project Background**

* The Compensation Administration Tool (CAT) is a PeopleSoft tool that will be used to manage proposed compensation and funding changes that will be effective at the beginning of the fiscal year or first semester, beginning in fiscal year 2017 (go-live date for the tool is December 2015)
* The CAT will replace what had previously been managed in the budget system for employee-level rate and funding changes, and become the system of record for such data; the budget system will receive only summary-level data
* The funding load hierarchy within HRS will be maintained; manual entry for the upcoming fiscal year will not be over written, funding information loaded from the CAT will load if edits are passed, if no funding for the new fiscal year is available from the previous two processes, funding will be rolled over from the previous fiscal year if the funding is valid

**Proposed Process Changes**

* A copy of the Standard Budget Ledger will be created annually at the beginning of the Compensation Administration process called the CAT Ledger
* Org and Fund/Major Class Edits will need to be maintained in the CAT Ledger
* Edits can be removed from the CAT ledger that are not wanted for compensation administration
* Scenario Edits will need to be last in the CAT Ledger or removed completely
* Org and Fund/Major Class Edits will need to be entered for the upcoming fiscal year in both the Actuals, Budget, and CAT Ledgers, as well as the 3270 UDDS table as soon as they are known for compensation administration purposes that begin in December for the next fiscal year

**Reasons for Changes**

* Unlike functionality within the current process, those establishing planned funding will be able to chose whether or not they would like the planned funding for the next fiscal year be passed to HRS
* If the planner chooses the option to pass the funding to HRS it will need to pass all SFS Actuals Ledger edits in HRS
* If the planner chooses the option not to pass the funding to HRS it will need to pass all SFS CAT Ledger edits to assure basic combinations are valid which will need to include the Org and Fund/Major Class Edits at a minimum

**Example**

* An individual may have a portion of their salary planned for grant funding that would require a project ID in the Actuals Ledger. However it is possible at the time of planning the project ID may not be known. The planner would chose to not pass the funding to HRS so the funding will be edited against the CAT Ledger which does not require a project ID. Funding would then be entered manually prior to the beginning of the fiscal year or rolled over from current funding if it is valid in HRS