# ELECTRONIC SALARY DISTRIBUTIONS USER GUIDE

If you have questions about information in this user guide, please e-mail Payroll Services.

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Background

The distribution form is used for processing changes to an existing distribution. There are certain situations when distributions must be processed using the paper form. The paper process must be used when:

- Processing new hires
- The employee changes departments in the middle of the fiscal year
- Updating the employee’s distribution

Enter a Distribution Change

Below are the basic instructions for changing an existing distribution using the new electronic distribution form.

**Note:** Only one request for a person on a particular Empl Rcd per fiscal year can be open at one time. If a distribution has not fully processed and needs to be changed, follow the instructions to cancel the request and then process a new one.

1. Log in to PeopleSoft using the Human Resources Login [www.uvm.edu/~erp/portal](http://www.uvm.edu/~erp/portal)
2. Navigation: Manager Self Service > UVM Online Forms > UVM Distribution Changes > Salary Distribution Change Req
3. Select the Add a New Value tab.
4. After confirming the Fiscal Year is correct, enter the appropriate search criteria.

**Note:** Both the department and the Empl ID must be entered. Use the magnifying glass to look up and select the employee to be modified or enter the information directly.
5. Click **Add**.

6. The Distribution page screen will open, displaying the job data fields at the top of the page.

   **Note:** Employee information has been omitted below to ensure privacy.

![Employee Information](image)

7. The distribution is displayed and shows the highest sequence for each effective dated row.

![Distributions](image)

8. Review the current distribution using one of two methods:
   - Horizontal: Use the left and right arrows in the upper right corner to view each effective dated row.
   - Vertical: Click **select all** to view all rows one page.

9. Click on the plus sign located in the top left corner of the distribution window, to insert a new effective dated row.

10. If it is not currently the 1\textsuperscript{st} or 16\textsuperscript{th} of the month, the system will produce a warning message.

    **Note:** It is possible to enter a date other than the 1\textsuperscript{st} or 16\textsuperscript{th} in the next step.

![Message](image)
11. Enter the correct effective date, ensuring the date sequence is followed.

12. A new line will appear and is identified as **New**

   **Note:** When adjusting distributions with multiple distribution dates, each date needs to have the new change added, beginning with the initial change.

13. The existing distribution will be copied to the new line. Enter or change the necessary values.

   **Note:** Chartstring data will automatically populate according to the combo code entered. Combo code data will automatically populate according to the chartstring entered.

14. After entering data, click **Validate**.

15. The program will confirm the distribution total equals 100% and that the combocode is valid for the time period entered. For each combocode in the distribution that has a GCA01 project, the PeopleSoft also checks that the project is open for the length of the distribution date given and that it is not closed before the next distribution date (or before the end of the fiscal year if it is the last distribution section).

   **Note:** All 'new' distribution sections need to be validated individually. If all new lines are validated, the Distribution Edits Status changes.

16. The Distribution Request ID is automatically assigned.

17. If changes are needed after validation, use the select to edit box.
18. Click on the **Cost Transfer tab** and complete the fields with the appropriate information.

   **Note:** If the late cost transfer tab is completed, it will print without additional steps with the form when the form is validated and sent to the process monitor or the reprint button is used.

19. Click on the **Comments/Notes tab** and fill in any relevant information.

20. When finished, return to the Salary Distribution tab, select **Submit for Approval** from the **Action** dropdown menu.

   **Note:** It is not necessary to complete the distribution change all in one sitting. Selecting the action **Save for Later** allows a request to be saved before it is complete. This action assigns the Request Id. Use the Request ID to find the distribution at a later date. To edit any new distribution, click on **Select to Edit**.
21. Click **Process**.

22. A pop-up will appear notifying that a distribution report will now be created.

![Message]

**Print and Process a Distribution Change**

After completing the steps above and submitting a request for approval, additional steps are necessary to ensure the distribution change is processed completely.

**Note:** Development of a process for obtaining electronic approvals for both the distribution change request and the cost transfer memo (if required) is currently underway. This process will eliminate the step of printing and manually routing for signatures. Until this process is complete, all electronic distributions and cost transfer forms need to be printed and signed.

These additional steps are:

- **Print the distribution form**
- **Obtain the appropriate signatures**
- **Mail**

**Print the Distribution Form**

1. After the form has been submitted for processing, a link to the process monitor is available.

2. Click the **Process Monitor** to access the Crystal report. For help using the process monitor, consult the guide: [General information on Running Reports and Queries](#).

3. The pdf will produce a form suitable for printing and to allow for appropriate signatures.
Content of the Distribution Form Document

The following sections describe the content of the printable document.

**Distribution Form**

**Report Header**

This section details employee information including Name, Empl ID, Empl Rcd, Department, Total Salary, Term and FTE. It also contains the request id number and relevant dates.

**Distribution Rows**

This section will show the old distribution with the new distribution displayed underneath (shaded gray).

**Signature and Verification**

This section allows for verification of the changes by relevant University officials.

I verify that the salary distribution information is reasonable in relation to the work associated with the University compensated activities included in this distribution form.

Faculty/Staff Signature

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Project Manager: ___________________________ Date: ____________

Department Chairperson: ___________________________ Date: ____________

Dean's Office: ___________________________ Date: ____________

GCA Award Setup Date: ____________
Cost Transfer Justification Form

Header

This section details employee information including Name, Empl ID, Empl Rcd, Department, Fiscal Year, Request ID and Request Date. Additionally, this section contains information specific to the expenditures being transferred.

<table>
<thead>
<tr>
<th>Employee ID</th>
<th>Empl Rec#</th>
<th>Department</th>
<th>Fiscal Year</th>
<th>Request Date</th>
<th>Request ID</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>0</td>
<td></td>
<td>2011</td>
<td>6/16/2011</td>
<td>0000002066</td>
</tr>
</tbody>
</table>

Cost Transfer Justification Form

Expenditures being transferred: Original Posted Date  Error Discovery Date
Cost Transfer Request Timeliness: Request > 90 Days of Original Occurrence of Transaction: Yes [ ] No [X]

Justification

This section will contain the information entered in the Cost Transfer tab in the original request and explains the necessity of processing the cost transfer.

Please provide a full explanation for the necessity of processing this cost transfer by answering the questions below. All cost transfers must answer questions 1 and 2; all transfers more than 90 days from the original cost posting must answer all 4 questions.

1. Why was the expense originally charged to the chart string which is now being transferred?
   The salary for this faculty member on the instructional function (201) is for teaching/research/service. The distribution change is for cost sharing on the general fund 201 function, just being specified for a specific project.

2. Why should this charge be transferred to the proposed chart string?
   Faculty member has committed effort on this project.

3. Why is this cost transfer being requested more than 90 days after the date of the original allocation and what extenuating circumstances justify this expenditure transfer?

4. What corrective action has been instituted to prevent this type of cost transfer from occurring after the date of the original allocation?
Signatures

This section allows for verification of the changes by relevant University officials.

![Signature Form]

Obtain the Appropriate Signatures

It is necessary to obtain the appropriate signatures on the distribution change in order for the change to be processed.

Mail the Form

The form should take the normal channels the old form would take.

1. Department-level signatures are received and the cost-transfer memo (if appropriate) is completed.
2. Documents are routed to Human Resource Services.

Contract Pay

Special instructions are necessary for processing changes to 9-month faculty choosing to be paid over 12 months.

- Each job’s distribution must have a 7/1 effective date to correctly calculate encumbrances.
- The **Contract Details button** will be displayed only for Empl Ids/Empl Rcds that have a contract. Clicking the button will display the contract start and end dates for that Empl Id/Empl Rcd. If there is a contract, there should be a line that says "Effort Eff Dt" next to the Effective Date/Seqno section in the section.

Look up Status of Requests

It is possible to check on the status of requests.
1. Log in to PeopleSoft using the Human Resources Login www.uvm.edu/~erp/portal

2. Navigation: Manager Self Service > UVM Online Forms > UVM Distribution Changes > Salary Distribution Change Req

3. Click on Find an Existing Value.

   ![Find an Existing Value Form]

4. Select the status of the entries for review. Refer to the chart for explanations of each status.

   ![Status Selection]

   Status: 

   ![Dropdown for Status]
Explanations of Status Indicators

**New**
The request is in progress and has not yet been submitted.

**Pending**
The request has been submitted but has not yet been reviewed.

**Request Approved**
The request has been approved but the data still resides in the temporary table.

**DBT Updated**
The data is has now been updated in PeopleSoft and the retroactive portion (if applicable) is being processed.

**Complete**
The retro process is complete. The retroactive component of a request is considered complete when the most recent payroll has posted. If the change is prospective, the data is marked complete after the department budget table (DBT) has been updated.

**Cancel a Request**

It is possible to cancel a request for distribution changes. Distributions with the status **New**, **Pending** or **Request Approved** may be cancelled. Requests with a status **DBT Updated** or **Complete** cannot be canceled. In this case a new distribution must be entered.

1. Log in to PeopleSoft using the Human Resources Login [www.uvm.edu/~erp/portal](http://www.uvm.edu/~erp/portal)
2. **Navigation:** Manager Self Service > UVM Online Forms > UVM Distribution Changes > Salary Distribution Change Req
3. Click on **Find an Existing Value** and enter the appropriate search criteria to locate the distribution for cancellation.
4. Enter search criteria and click search to find the distribution.

5. Select **Cancel Request** from the **Action** dropdown menu.

6. Click **Process**.

7. The **Action** dropdown menu and the **Process** button will gray out.

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**Reprint a Distribution Form**

A distribution form can be reprinted after it has been processed if an additional copy is needed for paper record.

**Note:** A request can only be reprinted after it has been submitted for approval. This is to prevent a request going out for signatures before all the distribution changes have been validated.

1. Log in to PeopleSoft using the **Human Resources Login** [www.uvm.edu/~erp/portal](http://www.uvm.edu/~erp/portal)

2. **Navigation:** Manager Self Service > UVM Online Forms > UVM Distribution Changes > Salary Distribution Change Req

3. Click on **Find an Existing Value** and enter the appropriate search criteria to locate the distribution form for reprinting.
4. Click the **Reprint Report** button on the **Salary Distribution Reqs Tab** under the Distribution Request ID number.

5. Click the **Process Monitor** to access the Crystal report. For help using the process monitor, consult the guide: [General Information on Running Reports and Queries](#).

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### Frequently Asked Questions

**Why do I have to print and obtain signatures?**

The team is currently working on a process for electronic signatures. This process will eliminate the step of printing and routing for signatures.

**Does this process replace the Effort Certification process?**

No. Effort certification must still occur when required.

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### Resources

#### Helpful Links

- [Late Cost Transfer Rules](#)
- [Payroll Deadline Schedule](#)
- [UFS Roadshow Topics (PDF)](#)
- [Professional Development & Training Classes](#)

#### Relevant UVM Departments

- [Sponsored Project Administration](#)
- [Human Resource Services](#)
- [University Financial Services](#)

#### Related Policies

- [Cost Transfers on Grants and Contracts](#)
- [University Policies and Operating Procedures](#)

This guide is intended for online use, and has a number of embedded links. Printing of these documents is discouraged, as they are updated frequently and consume paper resources when printed.