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Overview

The distribution form is used for processing chartstring changes or effort percentages to an existing salary distribution for an employee.

Approve a Distribution Change

Below are the basic instructions for approving a distribution using the electronic distribution workflow.

1. An email will be sent to an approver’s UVM email account notifying them that their approval is needed.

   Subject: Distribution Change Request ID 000000000 for Doe John James Needs Approval

   The following Salary Distribution Change Request needs your approval.

   Request ID: 000000000

   Name: Doe John James

   Empl ID: 0000000

   Empl Rd #: 1

   Department: 55700 - Pediatrics

   Fiscal Year: 2018

   Comments:

   Please log into PeopleSoft HCM by clicking on the link below. On the Find an Existing Value tab, hit Clear and select Pending in the Status dropdown. Under the Approval Inbox column, look for Needs Your Approval.

   https://catalog-test.uvm.edu/psp/hr/hcm/EMPLOYEE/HRMG2/UV_MODIFICATIONS/HRMG2DDB_CMP-001?Page=/V_HRMG2DDB_APPR&Action=CF&FISCAL_YEAR=08&EMPL_REQ=0

2. Log in to PeopleSoft via the link from the notification email. This will bring you to the Human Resources Login www.uvm.edu/~erp/portal.

3. Log in using your UVM netID and password. You will be asked to verify your identity via Multi-Factor Authentication for security purposes.

   Note: If you don’t use the link in the email, login and navigate to Manager Self Service > UVM Online Forms > UVM Distribution Changes > Salary Distribution Change Req
4. On the **Find an Existing Value** tab, click on the **Clear** button. Then select **Pending** from the **Status** dropdown list.

5. If there are multiple distributions in your list, sort the **Approval Inbox** column by clicking on the header. Those with **Needs your approval** status are pending your approval.

6. To review the change request, click on the name of the employee.
7. Click on the **Approval** tab. To view the request in an easier format, click on the **View Report**. This will open a PDF version of the report as tabs in your web browser. If there is a Cost Transfer form, two tabs will open; one for the distribution and the other for the Cost Transfer.

8. Review the report for accuracy.

9. If you approve of the changes, go back to the **Approval** tab. If you have to insert any more approvers or reviewers, continue to step 10, if not skip to step 12.

10. Insert the necessary approvers or reviewers by clicking on the green plus sign between yourself and Payroll Approver. The order of how you enter additional approvers or reviewers is the order that they will approve.
11. Enter the netID or search for name by clicking on the magnifying glass.

Note: Approver is the default. If you want to include a Reviewer, select the Reviewer radio button. A Reviewer is someone who you would like to review the request, but his or her approval is not needed. They will receive an email to review the request.

12. Once the approval workflow is set, click on the yellow Approve button.

13. An email will be sent to the person with whom the distribution change request is now Pending.

14. As the request moves through the workflow, electronic approvals will show on the bottom of the report version of the change request and if applicable, the cost transfer.

<table>
<thead>
<tr>
<th>Name</th>
<th>Title</th>
<th>Date/Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>John Doe</td>
<td>Business Manager</td>
<td>12/20/2017 10:13:27 AM</td>
</tr>
<tr>
<td>Jane Doe</td>
<td>Dean’s Office Admin</td>
<td>1/10/2018 2:54:40 PM</td>
</tr>
</tbody>
</table>
Deny a Distribution Change

1. If you do not approve of the changes, click on the Comments/Notes tab and type in your initials and date followed by the reason why you are denying the request.

   ![Salary Distribution Request Screen](image)

   - Employee ID: 0000001
   - EmpId Record: 0
   - Fiscal Year: 2018
   - Department: 10100
   - Request Date: 01/31/2018
   - Request ID: 0000026156

   **Comments**

   - Date/Time: Last Updated
   - Comments:
     
     JD 1/11/18: The effort percentage on project 00001 should be 10% and not 15%.

2. Return to the Approval tab and click on the yellow Deny button. This will return the request back to the originator.

   ![Approval Tab](image)

   - Employee ID: 0000001
   - EmpId Record: 0
   - Fiscal Year: 2018
   - Department: 10100
   - Request Date: 01/31/2018
   - Request ID: 0000026156

   **Approval Change Approval**

   - Original Path
     - Approved
     - Pending
     - Not Routed

   Your approval verifies that this salary distribution information is reasonable in relation to the work associated with the University compensated activities. For retroactive cost transfers on sponsored agreements your approval certifies that the cost to be transferred is an appropriate expenditure for the sponsored agreement charged and that the expenditure complies with the terms and restrictions governing that sponsored agreement.

   - Approve
   - PushBack
   - Deny

   **Note:** Deny always routes the request back to the originator. PushBack routes the request to the approver before you. Do not PushBack when the approver before you is the originator. This will cause the request to be in Error. You need to Deny the request.

3. The originator will receive an email that the request has been denied. It will include the comments that were entered for the reason why.
Content of the Distribution Form Document

The following sections describe the content of the change request 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.

<table>
<thead>
<tr>
<th>Created by</th>
<th>Last Modified by</th>
<th>Dept Position</th>
<th>FTE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name:</td>
<td>Last Name, First Name</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Distribution Rows

This section will show the old distribution with the new distribution displayed underneath.

<table>
<thead>
<tr>
<th>Effective Date: 07/1/2016</th>
<th>Eff Seq: 1</th>
<th>ComboCode</th>
<th>Dist %</th>
<th>Project Description</th>
<th>Project Start/End</th>
</tr>
</thead>
<tbody>
<tr>
<td>100</td>
<td>55020-12--</td>
<td>300-201102-211 -</td>
<td>0000-0000-0000</td>
<td>Name of Project</td>
<td>6/6/2016 - 6/5/2017</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Effective Date: 06/1/2017</th>
<th>Eff Seq: 0</th>
<th>ComboCode</th>
<th>Dist %</th>
<th>Project Description</th>
<th>Project Start/End</th>
</tr>
</thead>
<tbody>
<tr>
<td>100</td>
<td>55020-12--</td>
<td>300-201102-211 -</td>
<td>0000-0000-0000</td>
<td>Name of Project</td>
<td>6/6/2016 - 6/5/2017</td>
</tr>
</tbody>
</table>

Approvals and Verification

This section is generated as people approve the change request.

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.

<table>
<thead>
<tr>
<th>Name</th>
<th>Title</th>
<th>Date/Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>John Doe</td>
<td>Administrative Prof.</td>
<td>2/2/2018 11:05 AM</td>
</tr>
<tr>
<td>Jane Doe</td>
<td>Business Support Specialist</td>
<td>2/2/2018 11:15 AM</td>
</tr>
</tbody>
</table>
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>Employee Name</th>
<th>Empl Rcd</th>
<th>Department</th>
<th>Fiscal Year</th>
<th>Request Date</th>
<th>Request ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>#</td>
<td>Last Name, First</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Cost Transfer Request Timeliness: Request > 90 Days of Original Occurrence of Transaction: Y or N

Expenditures being transferred: Original Accounting Date MM/DD/YYYY

Principal Investigator(s): First Name Last Name (if applicable)

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.

All cost transfer requests must answer questions 1 and 2; all cost transfer requests more than 90 days from the accounting date of the original transaction must answer all 4 questions. Please provide a full explanation for the necessity of processing this cost transfer request by answering the questions below. If warranted, attach additional narrative.

1. Why were the expenses included in this cost transfer request originally charged to the current chart string(s)?

2. Why should these expenses be transferred to the proposed chart string(s)?

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

4. What organizational corrective action has been instituted to prevent this type of cost transfer from occurring in the future?
Approvals and Verification

This section is generated as people approve the change request.

*Note:* By approving, you are certifying that the cost to be transferred is an appropriate expenditure for the sponsored agreement charged and that the expenditure complies with the terms and restrictions governing that sponsored agreement. For central units they are approving available funding (SPA) and compliance with the University Operating Procedure for Cost Transfers.

<table>
<thead>
<tr>
<th>Name</th>
<th>Title</th>
<th>Date/Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>John Doe</td>
<td>Administrative Prof.</td>
<td>1/22/2018 11:05:19 AM</td>
</tr>
</tbody>
</table>

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](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**.

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

   ![Status Selection](image-url)
Explanations of Status Indicators

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

**Pending**
The request has been submitted and is pending approvals.

**Denied**
The request has been denied back to the originator.

**Request Approved**
The request has been approved by Payroll, but the data has not been updated to PeopleSoft.

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

**Request Completed**
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.

**Request Cancelled**
The request has been cancelled, as it is no longer valid.

Explanations of Approval Inbox Indicators

**Needs your approval**
The request is in progress and pending your approval.

**Other Approvals Pending**
The request is in progress and is waiting for approvals of other people.

**Needs originator approval**
The request has not yet been submitted into the workflow. It needs the originator to approve first.

**(blank)**
The request either has a status of DBT Updated, Request Approved, Request Cancelled, or Request Completed. When a request is in any of these statuses, it is no longer in workflow.

View a Distribution Form

A distribution form can be viewed at any point once saved in the system.

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 viewing.

![Salary Distribution Chng Rqsts](image)

4. Click the **View Report** button on the **Salary Distribution Reqs Tab** under the Distribution Request ID number.

![Distribution Request ID](image)

---

**Frequently Asked Questions**

Questions will be updated as the new process is used.

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**Resources**

**Helpful Queries**

<table>
<thead>
<tr>
<th>Query</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>UV_DIST_PAST_PROJECT_END_DATE</td>
<td>Shows distributions based on prompts that have salary distributions past a project end date by employee.</td>
</tr>
<tr>
<td>UV_FY_ENCUMBRANCES</td>
<td>Shows encumbrances as of the most recent payroll posting date based on prompts by employee.</td>
</tr>
<tr>
<td>UV_PAY_ERN_DIST</td>
<td>Shows payroll earnings as of the most recent payroll posting based on prompts by employee</td>
</tr>
</tbody>
</table>
Helpful Links

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

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

Relevant UVM Departments

- Payroll Services
- Sponsored Project Administration
- Cost Accounting 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.