

APPROVER ELECTRONIC SALARY DISTRIBUTIONS

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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 0000026166 for Doe, John James Needs Approval

The following Salary Distribution Change Request **needs your approval**.

Request ID: 0000026166

Name: Doe, John James

Empl ID: 00000000

Empl Rcd #: 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://catalyst-test.uvm.edu/psp/HRSTM/EMPLOYEE/HRMS/c/UV_MODIFICATIONS.UV_HRM00050_CMP.GBL?Page=UV_HRM00050_APR2&Action=U&FISCAL_YEAR=0&EMPL_RCD=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**

- On the **Find an Existing Value** tab, click on the **Clear** button. Then select **Pending** from the **Status** dropdown list.

Salary Distribution Chng Rqsts

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

Request Date =

Request ID begins with

Fiscal Year =

Department begins with

Empl ID begins with

Empl Record =

Status =

Name begins with

User ID begins with

☒ Correct History ☐ Case

Status dropdown list:

- DBT Updated
- Denied
- New Request In Progress
- Pending**
- Request Approved
- Request Cancelled
- Request Completed

- 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.

[Basic Search](#)

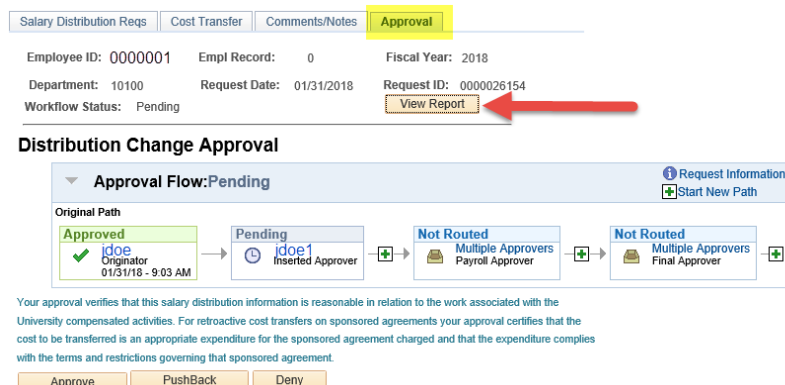
Search Results

View All

Request Date	Request ID	Fiscal Year	Department	Empl ID	Empl Record	Status	Name	User ID	Approval Inbox
01/31/2018	0000026154	2018	10100	0000001	0	Pending	Doe, John	mmouse	Needs your approval
01/31/2018	0000026155	2018	10100	0000002	0	Pending	Doe, Jane	mmouse	Needs your approval
01/31/2018	0000026156	2018	10100	0000003	0	Pending	Doe, Julie	mmouse1	Other Approvals Pending
01/05/2018	0000026097	2018	10050	0000004	0	Pending	Doe, Justin	mmouse1	Needs originator approval
01/02/2018	0000026074	2018	11340	0000005	0	Pending	Doe, Janice	mmouse1	Needs originator approval

- To review the change request, click on the name of the employee.

- 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.



Salary Distribution Reqs | Cost Transfer | Comments/Notes | **Approval**

Employee ID: 0000001 Empl Record: 0 Fiscal Year: 2018
 Department: 10100 Request Date: 01/31/2018 Request ID: 0000026154
 Workflow Status: Pending **View Report**

Distribution Change Approval


Approval Flow: Pending

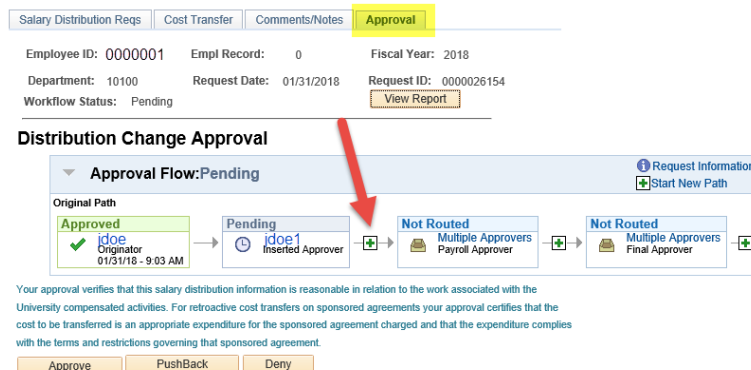
Original Path

Approved (Originator: idoe, 01/31/18 - 9:03 AM) → Pending (Inserted Approver: idoe1) → Not Routed (Multiple Approvers: Payroll Approver) → Not Routed (Multiple Approvers: Final Approver)

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

- Review the report for accuracy.
- 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.
- 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.



Salary Distribution Reqs | Cost Transfer | Comments/Notes | **Approval**

Employee ID: 0000001 Empl Record: 0 Fiscal Year: 2018
 Department: 10100 Request Date: 01/31/2018 Request ID: 0000026154
 Workflow Status: Pending **View Report**

Distribution Change Approval

Approval Flow: Pending

Original Path

Approved (Originator: idoe, 01/31/18 - 9:03 AM) → Pending (Inserted Approver: idoe1) → Not Routed (Multiple Approvers: Payroll Approver) → Not Routed (Multiple Approvers: Final Approver)


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

11. Enter the netID or search for name by clicking on the magnifying glass.

Insert additional approver or reviewer

Choose an approver or reviewer to insert

User ID: 

Insert as: ☒ Approver ☐ Reviewer

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.

Salary Distribution Reqs | Cost Transfer | Comments/Notes | **Approval**

Employee ID: 0000001 Empl Record: 0 Fiscal Year: 2018
 Department: 10100 Request Date: 01/31/2018 Request ID: 0000026156
 Workflow Status: Pending

Distribution Change Approval

Approval Flow: Pending View/Hide Comments + Start New Path

Original Path

```

graph LR
  A[jdoe  
Originator  
01/31/18 - 9:08 AM] --> B[jdoe1  
Inserted Approver  
01/31/18 - 9:09 AM]
  B --> C[Multiple Approvers  
Payroll Approver]
  C --> D[Multiple Approvers  
Final Approver]
  
```

Comment History

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.

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.

APPROVALS

Name	Title	Date/time
John Doe	Business Manager	12/20/2017 10:13:27 AM
Jane Doe	Dean's Office Admin	1/10/2018 2:54:40 PM

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 Reqs | Cost Transfer | **Comments/Notes** | Approval

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

Comments Find | View All First 1 of 1 Last

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.

Salary Distribution Reqs | Cost Transfer | Comments/Notes | **Approval**

Employee ID: 0000001 Empl Record: 0 Fiscal Year: 2018
 Department: 10100 Request Date: 01/31/2018 Request ID: 0000026154
 Workflow Status: Pending [View Report](#)

Distribution Change Approval

Approval Flow: Pending [Request Information](#) [Start New Path](#)

Original Path

```

graph LR
    A["Approved  
jdoo  
Originator  
01/31/18 - 9:03 AM"] --> B["Pending  
jdoo1  
Inserted Approver"]
    B --> C["Not Routed  
Multiple Approvers  
Payroll Approver"]
    C --> D["Not Routed  
Multiple Approvers  
Final Approver"]
  
```

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.

UVM Distribution Form

Created by jdoe Last Modified by jdoe Fiscal Year 20##	Dept ##### - Department Name Position Pos # - Position Title Salary/Term/FTE Salary / ## Mths / #.###	Request ID ##### Request Dt MM/DD/YYYY Run Date: MM/DD/YYYY
Page 1 of 1		

Name: Last Name, First Name **EmplId/Rcd:** ##### / #

Distribution Rows

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

Effective Date: 07/1/2016		Eff Seq: 1				
ComboCode	Dist %	Account-OU-Dept-Fund-Source-Function-Project-Prgm-Ppse-Ppty	Project Description	Project Start/End		
	100	55020-12--300-201102-211--0000-0000-0000	Name of Project	6/6/2016 - 6/5/2017		

Effective Date: 06/1/2017		Eff Seq: 0		***** New Distribution ****		
ComboCode	Dist %	Account-OU-Dept-Fund-Source-Function-Project-Prgm-Ppse-Ppty	Project Description	Project Start/End		
NEW	100	55020-12--100-100001-201-----0000-0000-0000				
DEL	⬇	55020-12--300-201102-211--0000-0000-0000	Name of Project	6/6/2016 - 6/5/2017		

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.

APPROVALS

Name	Title	Date/Time
John Doe	Administrative Professional	1/22/2018 11:05 AM
Jane Doe	Business Support Generalist	1/22/2018 11:15 AM

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.



Cost Transfer Justification Form

1/22/18 10:27 AM

<u>Employee ID</u>	<u>Employee Name</u>	<u>Empl Rec#</u>	<u>Department</u>	<u>Fiscal Year</u>	<u>Request Date</u>	<u>Request ID</u>
#####	Last Name, First	#	####	20##	MM/DD/YYYY	#####

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.

APPROVALS

Name	Title	Date/time
John Doe	Administrative Professional	1/22/2018 11:05:19 AM
Jane Doe	Business Support Generalist	1/22/2018 11:15:48 AM

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**.

Salary Distribution Chng Rqsts

Enter any information you have and click Search. Leave fields blank for a list of all values.

Request Date =
Request ID | begins with
Fiscal Year =
Department | begins with
Empl ID | begins with
Empl Record =
Status =
Name | begins with
User ID | begins with
☒ Correct History ☐ Case Sensitive

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

Status =

Explanations of Status Indicators

<i>New Request in Progress</i>	The request is in progress and has not yet been submitted.
<i>Pending</i>	The request has been submitted and is pending approvals.
<i>Denied</i>	The request has been denied back to the originator.
<i>Request Approved</i>	The request has been approved by Payroll, but the data has not been updated to PeopleSoft.
<i>DBT Updated</i>	The data is has now been updated in PeopleSoft and the retroactive portion (if applicable) is being processed.
<i>Request Completed</i>	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.
<i>Request Cancelled</i>	The request has been cancelled, as it is no longer valid.

Explanations of Approval Inbox Indicators

<i>Needs your approval</i>	The request is in progress and pending your approval.
<i>Other Approvals Pending</i>	The request is in progress and is waiting for approvals of other people.
<i>Needs originator approval</i>	The request has not yet been submitted into the workflow. It needs the originator to approve first.
<i>(blank)</i>	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
2. **Navigation: Manager Self Service > UVM Online Forms > UVM Distribution Changes > Salary Distribution Change Req**


- Click on **Find an Existing Value** and enter the appropriate search criteria to locate the distribution form for viewing.

Salary Distribution Chng Rqsts

Enter any information you have and click Search. Leave fields blank for a list of all values.

▼ Search Criteria

Request Date = 
Request ID begins with 
Fiscal Year =
Department begins with 
Empl ID begins with 
Empl Record =
Status =
Name begins with
User ID begins with
☒ Correct History ☐ Case Sensitive



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

Distribution Request ID 0000025603

Frequently Asked Questions

Questions will be updated as the new process is used.

Resources

Helpful Queries

UV_DIST_PAST_PROJECT_END_DATE	Shows distributions based on prompts that have salary distributions past a project end date by employee.
UV_FY_ENCUMBRANCES	Shows encumbrances as of the most recent payroll posting date based on prompts by employee.
UV_PAY_ERN_DIST	Shows payroll earnings as of the most recent payroll posting based on prompts by employee

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 Involving Sponsored Agreements \(PDF\)](#)
- [University Policies and Operating Procedures](#)