This *Quick Guide* provides you with the steps to create, modify, and approve salary distributions for active employees in the PAC system. Salary distribution tells the payroll system where to charge regular earnings. You can only enter these transactions for active employees within your home department. Salary profiles can be modified to reflect changes going forward and retroactively.

If a transaction receives final approval after the payroll close date for the effective date entered, the new profile will still be effective as of the profile effective date and the payroll that was indicated as the current pay period in the transaction will be considered retroactive and the cost transfer processed.

To access, go to [my.columbia.edu](http://my.columbia.edu), click the **HR Manager** tab, click the PAC icon, select the Manager Self-Service tile from the PAC Homepage, then select LA Transactions, then select **Salary Distribution** from the left menu.

**Select the Employee Record**

Salary Distribution profiles are created for **active employees in your home department** on a specific employee record. As employees can have multiple records, be sure to select the correct record on which to create or modify the profile.

**Review the Current Information**

Verify the employee’s information is the correct and review any historical salary distribution profiles and allocations as needed.
Create/Modify a Salary Distribution Profile
Enter the new profile information into the New Salary Distribution Info Section

Comment: Comments are required where any portion is allocated to a sponsored project (i.e., one beginning with PG, GG, or IN) regardless if it is a current, future, or retro allocation and it must be at least 30 characters in length, or when creating a retroactive salary distribution because it contains the cost transfer component and comments are required for cost transfers.

Profile Effective Date: Indicates when to begin charging the combo codes listed in the allocations. The most recent effective dated distribution completely replaces a prior profile.

- This date can be earlier than the start of the current pay period but must be within the current fiscal year. If prior to the current pay period, a retroactive salary distribution occurs. The RSD indicator reads ‘yes’.

- This date does not have to begin on a pay period start date as funding arrangements can start in the middle of a pay period

Funding End Date: indicates the last day the employee’s regular earnings should be charged to the combo code(s) in the salary distribution profile and is required for all Salary Distribution transactions.

- For salaried employees not on a grant and without a specific funding end date, enter 6/30 FY and the distribution will roll over to the next FY at the end of each fiscal year

- For salaried employees not on a grant with a specific funding end date, enter the actual funding end date. The funding allocation will end on that date and a new profile must be entered

- For employees on a grant, enter the actual funding end date. The allocations indicated in that profile will end on that date and a new profile must be entered

Combination Code: Enter the combination code(s) to which you want to charge part or all the distribution. Combo codes are restricted based on the REG earnings code (REG is the earnings code for salary distributions). The system will not let you charge a combo code that is invalid for that earnings code. Ensure the combo code is active for the transaction dates. Select the “+” button (in the Allocation section) to open another section to distribute salary to more than one Combination Code. Make sure the total allocation = 100%.

If charging one or more foreign department combo codes, the transaction will route to all foreign funding department approvers after home (admin) department approval.
**Combination Code Amount/% Distribution:** Enter either the Combo Code Amount (dollar amount) or Percent of Distribution (not both). When you enter a value into either of these fields, the other field is “grayed out”.

- Combo Code amount is the dollar amount of the salary to be charged to the combo code
- Percent of Distribution is the percentage amount of the salary to be charged to the combo code

**Period Amount:** This is user calculated and only entered when entering a Combination Code Amount

- The Period Amount equals the amount of the employee’s salary for the timeframe between the Profile Effective Date and the Funding End Date
- The system performs the calculation to arrive at the percentage to charge for the employee’s regular earning

**Create multiple profiles in the same transaction:** This is a way to ensure an employee’s salary funding charges continue when a distribution profile that does not automatically roll over ends.

To do this, click on the “+” button to the right of the Period Amount field to open a new blank section.

You may enter as many profiles as you need as well as multiple allocation lines within each new profile, ensuring the total percentage amount equals 100% for each profile.

**Important!** When multiple profiles and combo code charges are submitted in the same transaction, they are approved/denied/recycled together. An approver cannot take separate actions on different portions of the transaction.

**Documentation Requirements**

When allocating charges to a sponsored project, the Sponsored Project Details section must be completed, and the supporting documentation attached to the transaction. **Important!** Attaching a document triggers a requirement to complete the remaining Sponsored Project Details fields.

Select **Upload.** Then select **choose file** to locate the document. The “+” opens another row to add another document and the “-” deletes a row and the document within. Select **“View”** to view the uploaded document.
Submit into Workflow for Approval
1. Select Save and Submit to send the transaction into the workflow and to the 1st level approver in the home department
2. Select Save for Later and the transaction will remain in initiator status where you, or another initiator can access it and update it with new information
3. Select Quit Without Saving to return to the Search page without saving any entered information

Note: If charging foreign combo codes for employees within your home dept., the transaction will route to the foreign departments for approval after home dept. approval.

Pending Transactions Page
You can view the status of all Labor Accounting transactions on this page, accessible from the left menu of the LA Transactions page. This is view only page. Approvers access transactions to approve from the Worklist.

Statuses include
- Pending - submitted (in workflow), approved (does not specify level), requested (final approval and enroute to PAC processing)
- Cancelled - denied and removed from system
- Processed - approved and processed in PAC

View Salary Distribution Approval History
Click on the Salary Distribution Approval History link. The Transaction Approval History window appears where you can view the chain of approvals and comments for all prior approved salary distribution transactions for this employee. Attached documents are viewable from this section the day after it receives final approval.
**Approver Steps**

**Access and Review**

Navigate to the Worklist and select Salary Distribution from the left menu. Click the link for the Employee’s Name to review the transaction.

![Worklist Menu]

**Select the Approver Action**

Select the appropriate button on the bottom of the screen

- **Approve** – approve and send to the next level for approval. If this is the final level approval, the transaction is submitted into PAC
- **Deny** – deny the transaction
- **Recycle** – sends the transaction back for correction. Be sure to add a comment as to why it is being recycled
- **Save** – saves updated information if made by the 1st level admin department approver. Subsequent level approvers can only add a comment to the transaction
- **Quit Without Saving** – return to the Worklist without saving entered data

![Workflow Status]

For steps on how to process multiple transactions at once, access the PAC Mass Review Salary Distribution Quick Guide.

**Workflow Status**

Workflow Status provides the location of transactions currently in workflow. This page is in the Worklist menu and is viewable by approvers. Select the Details link next to the transaction. The top of the page displays the overall transaction status. The Workflow Routing section workflow routing including the approvers queues the transaction is currently in.

![Workflow Status Details]

For complete instructions on how to submit Salary Distribution Transactions, access the PAC Accounting Transactions course. For more information on approving PAC transactions, access the PAC Approver Training course.

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**Columbia University Human Resources**

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