

Template Based Hire (TBH) – Page 2 Labor Accounting – Job Aid

Visit the HR website for additional training information.

Purpose:

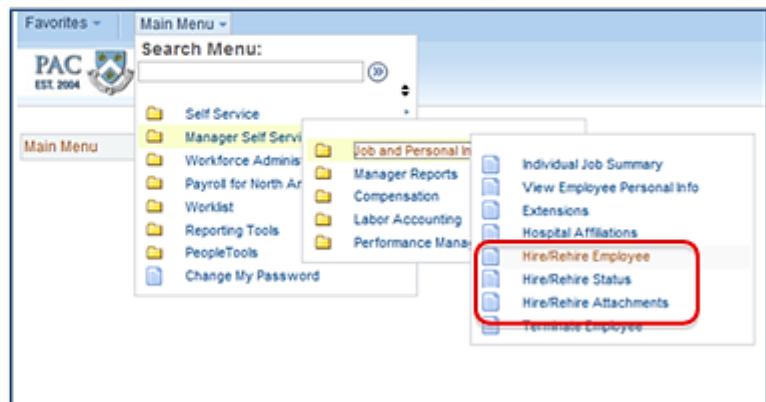
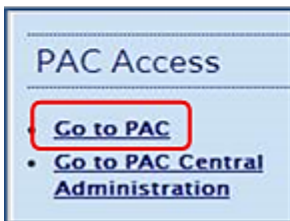
This job aid provides you with an overview of the steps to charge earnings for faculty and staff and to create additional compensation payments (add comps) known at the time of hire or rehire (page 2 of the new hire/rehire templates).

Access PAC Hire Rehire Templates

1. Navigate to myColumbia portal @ <https://my.columbia.edu>
2. Log in with your UNI and Password
3. Click on the “HR Manager Resources” tab
4. Under the PAC Access section:
 - a. Click the ‘Go to PAC’ link
5. The "Hire/Rehire Employee" page is located within the “Job and Personal Information” folder within the “Manager Self Service” folder.

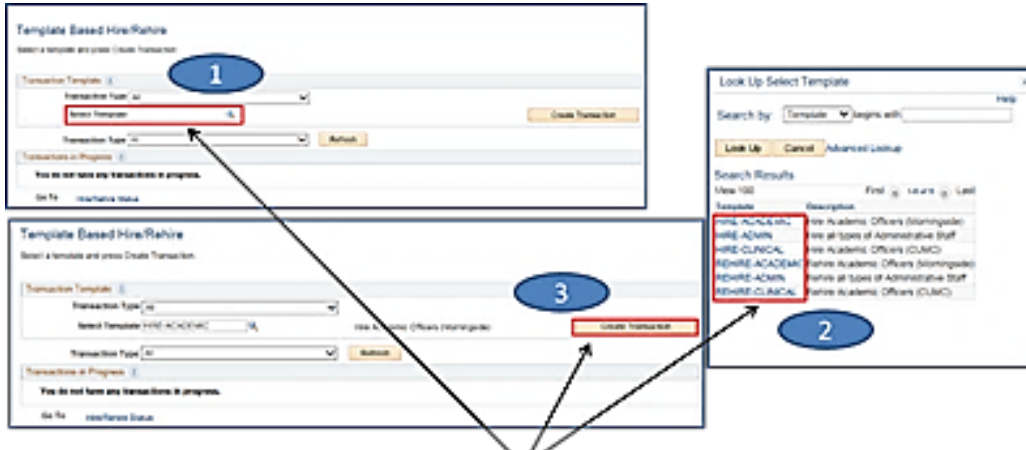
myColumbia Portal PAC Access Link

TBH Pages within PAC



Navigate to the Applicable Hire/Rehire Template

1. Click the magnifying glass and select the desired template.



To Access and Select a Hire Template:


1. From within the Transaction Template section, click on the look up button next to the Select Template field
2. Select the needed template from the search results list
3. Click "Create Transaction"

- To access a saved template, initiated but not yet submitted, click on the employee name link that appears in the Transactions in Progress section of the page.

Template Based Hire/Rehire
Select a template and press Create Transaction.

Transaction Template (?)

Transaction Type: All

Select Template 

Create Transaction

Transaction Type: All Refresh

Transactions in Progress

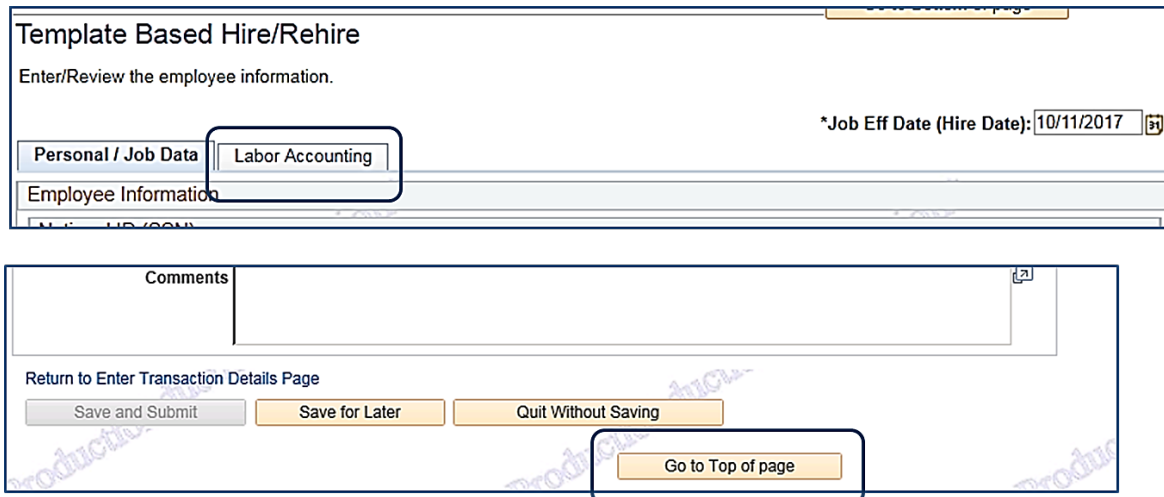
Select	Transaction Type	Effective Date	Name	Person ID	Action	Country
<input type="checkbox"/>	HIRE	01/12/2015	Peyton Willow	NEW	Hire	United States
<input type="checkbox"/>	HIRE	12/29/2014	Adam Smith	NEW	Hire	United States
<input type="checkbox"/>	HIRE	02/02/2015	Melissa Parker	NEW	Hire	United States
<input type="checkbox"/>	HIRE	02/03/2015	Susie Jones	NEW	Hire	United States
<input type="checkbox"/>	HIRE	02/03/2015	Stephen Milos	NEW	Hire	United States
<input type="checkbox"/>	HIRE	02/09/2015	Lena Grande	NEW	Hire	United States
<input type="checkbox"/>	HIRE	02/08/2015	Lena Leonard	NEW	Hire	United States
<input type="checkbox"/>	HIRE	02/13/2015	A BC	NEW	Hire	United States
<input type="checkbox"/>	HIRE	03/16/2015	Joanna Johnson	NEW	Hire	United States

Delete Selected Transactions

Go To Hire/Rehire Status

Access Page 2 of the Templates

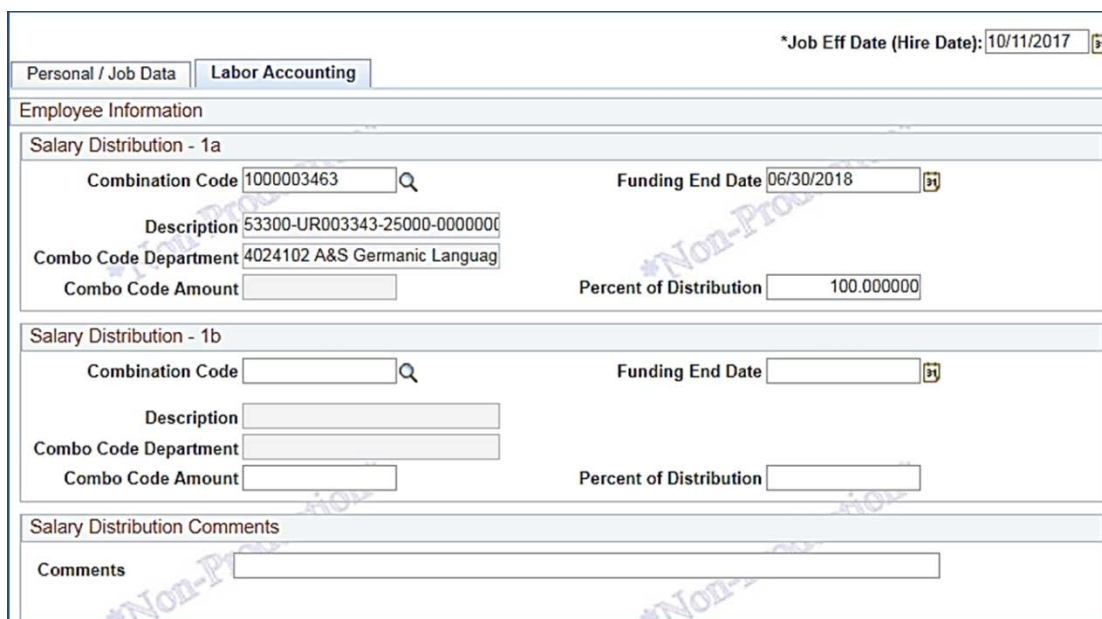
After completing page 1 of the template, click the “Go to Top of Page” button at the bottom of the template and then the “Labor Accounting” tab to move to page 2.



The screenshot shows the 'Template Based Hire/Rehire' form. At the top, it says 'Enter/Review the employee information.' Below this, there are two tabs: 'Personal / Job Data' and 'Labor Accounting'. The 'Labor Accounting' tab is selected and highlighted with a red box. To the right of the tabs, there is a field for '*Job Eff Date (Hire Date):' with the value '10/11/2017'. Below the tabs, there is a section for 'Employee Information'. At the bottom of the form, there is a 'Comments' section and a 'Return to Enter Transaction Details Page' button. Below this, there are three buttons: 'Save and Submit', 'Save for Later', and 'Quit Without Saving'. A red box highlights the 'Go to Top of page' button at the bottom right of the form.

Enter the Salary Distribution Information

You can enter up to 2 (two) different funding allocations (in the Academic and Clinical templates currently). This will be applied to the Administrative templates and you will see additional sections in the Administrative templates until the update is made. At least one salary distribution entry is required for a transaction. If the salary is to be allocated to more than two funding sources, submit the template using the department default account and then update the employee's profile on the Salary Distribution page once they are hired in the system.



The screenshot shows the 'Salary Distribution' section of the form. It has two tabs: 'Personal / Job Data' and 'Labor Accounting'. The 'Labor Accounting' tab is selected. Below the tabs, there is a section for 'Employee Information'. Below this, there are two sections for 'Salary Distribution': 'Salary Distribution - 1a' and 'Salary Distribution - 1b'. Each section has fields for 'Combination Code', 'Funding End Date', 'Description', 'Combo Code Department', 'Combo Code Amount', and 'Percent of Distribution'. In the 'Salary Distribution - 1a' section, the 'Combination Code' is '1000003463', the 'Funding End Date' is '06/30/2018', the 'Description' is '53300-UR003343-25000-000000', the 'Combo Code Department' is '4024102 A&S Germanic Languag', and the 'Percent of Distribution' is '100.000000'. The 'Salary Distribution - 1b' section has empty fields. Below the salary distribution sections, there is a 'Salary Distribution Comments' section with a 'Comments' field.

Salary Distribution Entry Steps:

1. **Combination Code:** Enter the combination code(s) to which you want to charge part or all of 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.

- The combo code description and the combo code department number and name display

Key Combo Code Points:

- Combo code numbers once assigned to a ChartString will not change
- Ensure the combo code is active for the transaction dates
- If the combo code to charge is not yet established, you can charge the department default combo code

2. **Funding End Date:** Enter the Funding End Date for the salary distribution.
 - 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 (e.g. 12/14/YYYY). The funding allocation will end on that date and a new profile must be entered

3. **Combination Code Amount/% Distribution:** Enter either the Combo Code Amount (dollar amount) or Percent of Distribution.

Key Combination Code Amount/% Distribution Points:

- 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
- Enter either one or the other but not both
- When you enter a value into either of these fields, the other field is “grayed out”
- The system converts entered Combo Code Amounts into percentages (combo code amount/annual rate) and stores that percentage
- For \$0 salary appointments with no regular earnings, enter a combo code and percent distribution. This acts as a “placeholder” as the employee does not have regular earnings and nothing will be charged to the combo code
- For casual employees, enter a combo code and percent distribution

Note: The Combo Code Amount field is available for entry when the NAANNL or CNTRCT rate code is selected on page 1. It is not available if the NAHRLY rate code is selected (use the % Distribution field when selecting NAHRLY).

4. **Comment:** Enter a comment for the distribution(s) at the bottom of the salary distribution section (optional).
5. **Allocate the Salary Distribution to more than one funding arrangement, if applicable:** Follow the steps above to enter the 2nd section.

Submit the Template

If there are no additional compensation payments to be entered, you are ready to submit the template.

1. Click "Save and Submit" to send the template into the workflow and to the 1st level approver in the home department. 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.

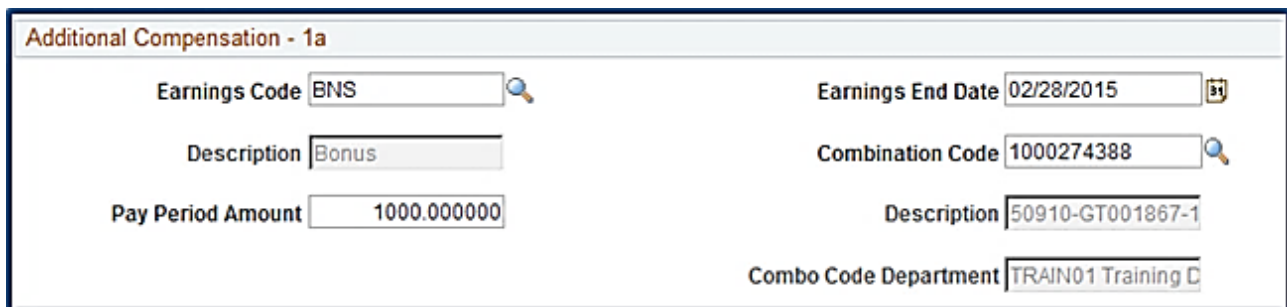
Other options

- Click "Save for Later" and the template will remain in the Initiator's Transactions in Progress Queue where it can be accessed by the initiator to update it with new information
- Click "Quit Without Saving" to return to the Home page without saving any entered information
- Click "Return to Enter Transaction Details Page" link to go to page 1 of the template



Enter Additional Compensation Payments

Add comps are one-time or ongoing payments made in addition to regular earnings and are created for many reasons including extra pay for additional duties performed, special one-time payments and ongoing clinical payments of varying types. You can enter up to three (3) additional compensation payments and each payment can be distributed across two (2) different combo codes - in the Academic and Clinical templates currently. This will be applied to the Administrative templates and you will see additional sections in the Administrative templates until the update is made.



Additional Compensation Entry Steps:

1. **Earnings Code:** Click the magnifying glass and select the earnings code for the payment. The earnings codes available to choose from are specific to the employee. For example, you cannot select a clinical earn code for an admin employee at Morningside.
 - Earnings Code selection is restricted to the type of hire and only codes the employee is eligible to receive will be accepted when you submit the template
2. **Earnings End Date:** Enter the Earnings End Date for the add comp payment.
 - The Earnings End Date is required and indicates the last pay check the employee is to receive the add comp payment. This date must fall on the end of a pay period, i.e. the 15th or last day of the month and must be the same for each allocation within a particular earnings code
3. **Combination Code:** Enter the combination code(s) to which you want to charge part or all of the add comp. Combo codes are restricted based on the earnings code selected. The system will not let you charge a combo code that is invalid for that earnings code.
4. **Pay Period Amount:** Enter the amount paid to the employee *each pay period* (not the total amount). To calculate the pay period amount, take the total amount of the add comp and divide it by the number of pay periods it is to be paid over.
5. **Comments:** Enter a comment for the add comp payment at the bottom of *each* additional compensation payment section (required). Include the nature and reason for the add comp including specific details required by your department or school. For oversight and auditing reasons, it is required that you make every effort to make this information as specific as possible
6. **Allocate the Add Comp payment to more than one combo code, if applicable:** Follow the steps above to enter the 2nd section. The Comment (step 5) applies to this one entire payment. When an add comp is being charged to more than one combo code, the pay period amount is the amount per pay period per combo code.
7. **Enter another Add Comp Payment:** If the employee is to receive more than one type of add comp payment at the time of hire, you can enter up to three add comp payments on the template. Follow the steps above to enter into the additional sections.
8. **Submit the Template:** Add comps that receive final approval by the final approval date on the payroll calendar will take effect as of that pay period. If final approval occurs after the final approval date on the payroll calendar, the add comp will take effect as of the following pay period

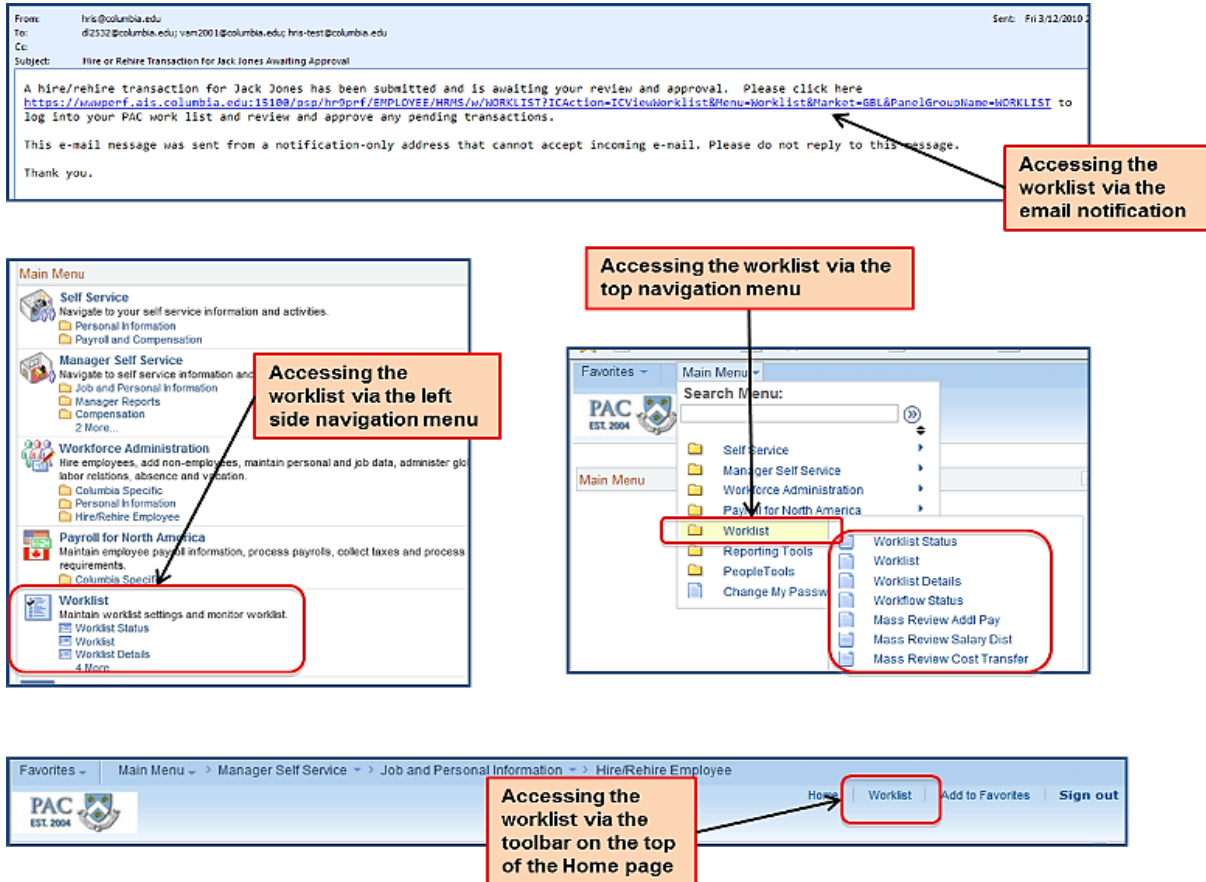
Note: PAC will retroactively calculate past payments due and include them in the paycheck following approval of the transaction.

Example of an Add Comp Payment charged to two Combo Codes

Additional Compensation - 1a			
Earnings Code	BNS	Earnings End Date	02/28/2015
Description	Bonus	Combination Code	1000274388
Pay Period Amount	500.000000	Description	50910-GT001867-1
		Combo Code Department	TRAIN01 Training C
Additional Compensation - 1b			
Earnings Code	BNS	Earnings End Date	02/28/2015
Description	Bonus	Combination Code	1000274389
Pay Period Amount	500.000000	Description	50020-UR003343-4
		Combo Code Department	TRAIN01 Training C

Review and Approve New Hire/Rehire Templates – Approver Steps

1. **Access the Worklist:** by clicking on the link sent in the email notification, or, once you are logged in to the PAC application, by clicking on “Worklist” from the main menu (either from the left side menu or the horizontal menu) or by clicking on “Worklist” from the toolbar



The first screenshot shows an email notification from hr@cis.columbia.edu with a subject line 'Hire or Rehire Transaction for Jack Jones Awaiting Approval'. The body contains a link to the worklist and a red box with the text 'Accessing the worklist via the email notification'.

The second screenshot shows the PAC Main Menu with a red box around the 'Worklist' option under 'Workforce Administration'. A red box with the text 'Accessing the worklist via the left side navigation menu' points to this option.

The third screenshot shows the PAC Main Menu with a red box around the 'Worklist' option under 'Main Menu'. A red box with the text 'Accessing the worklist via the top navigation menu' points to this option.

The fourth screenshot shows the PAC Home page with a red box around the 'Worklist' link in the top toolbar. A red box with the text 'Accessing the worklist via the toolbar on the top of the Home page' points to this link.

2. **Select the employee transaction**
 - Click on the link for the Employee’s Name.
 - Click “Continue” to move to Page 1
3. **Review the Information:** Confirm the hire data on page 1 of the template and attached documents
4. **Navigate to Page 2:** Click the “Labor Accounting” tab at the top of the page

5. **Review page 2 of the template information:** Confirm the Salary Distribution and any Add Comp payments
6. **Select an Action:**
 - *Approve* – approve and send to the next level for approval. If this is the final level approval, the transaction moves into the HRPC for review
 - *Deny* – deny the transaction
 - *Recycle* – sends the transaction back to the admin department 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. A subsequent level approver can only add a comment to the transaction
 - *Quit Without Saving* – return to the Worklist without saving entered data

If you have multiple approver levels, the Worklist Filters dropdown selection allows you to filter transactions by approval level

On this screen print there are 18 transactions. Navigate through the pages by clicking on the arrow icons. You can also select the "View All" link to see a larger list (if applicable)

Worklist
Worklist for ca_d2532: Denise Luciano

Detail View

Worklist Filters

Level 1 Approver

Level 2 Approver

Effective Date

Link

Feed

From	Date From	Work Item	Type of Trans.	Effective Date	Link	Personnel	Name	FLPT	Job Code	Department
Ludiano Denise	12/16/2014	Level 3 Approver	Add Pay Approval	1/1/15	102344, Gerard Lauren, 10183874, 0	Gerard Lauren	Gerard Lauren	FT	314110	TRAIN02
Ludiano Denise	02/17/2015	Level 3 Approver	Add Pay Approval	01/01/2015	102370, Choate Catherine, 10183876, 0, 2014-11-28, 0	Choate Catherine	Choate Catherine	FT	011920	TRAIN01
Ludiano Denise					102354, Gerard Lauren, 10183874, 0, 2014-12-10, 0	Gerard Lauren	Gerard Lauren	FT	314110	TRAIN02
Ludiano Denise					102359, Stevenson Shawna, 10183875, 0, 2014-12-16, 0	Stevenson Shawna	Stevenson Shawna	FT	012100	TRAIN02
PAC Training ID	12/17/2014	Level 1 Approver	Add Pay Home Dept Approval	12/01/2014	102349, Stevenson Shawna, 10183876, 0, 2014-12-17, 0	Stevenson Shawna	Stevenson Shawna	FT	012100	TRAIN02
PAC Training ID	12/18/2014	Level 1 Approver	Add Pay Home Dept Approval	12/01/2014	102351, Stevenson Shawna, 10183875, 0, 2014-12-16, 0	Stevenson Shawna	Stevenson Shawna	FT	012100	TRAIN02
PAC Training ID	12/22/2014	Level 1 Approver	Add Pay Home Dept Approval	12/01/2014	102352, Thomwood Nathaniel, 10183880, 0, 2014-12-22, 0	Thomwood Nathaniel	Thomwood Nathaniel	FT	012100	TRAIN02
PAC Training ID	02/01/2015	Level 1 Approver	Hire/Rehire Home Dept Approval	02/01/2015	102380, Jones Weller, 10183881, 0, 2014-12-22, 0	Jones Weller	Jones Weller	FT	010100	501000X
PAC Training ID	02/02/2015	Level 1 Approver	Hire/Rehire Home Dept Approval	02/02/2015	102380, Jones Weller, 10183881, 0, 2014-12-22, 0	Jones Weller	Jones Weller	FT	010100	501000X
Ludiano Denise	02/16/2015	Level 1 Approver	Hire/Rehire Home Dept Approval	03/16/2015	102377, Grant Gina, 10183877, 0, 2014-12-22, 0	Grant Gina	Grant Gina	FT	317101	752110X
					102345, Grant Gina, 10183877, 0, 2014-12-22, 0	Grant Gina	Grant Gina	FT	012100	TRAIN02
					102347, Mottet Joseph, 10183878, 0, 2014-12-22, 0	Mottet Joseph	Mottet Joseph	FT	012100	TRAIN02

Click on any column header to sort the results list

To access a transaction, click on the "Employee Name" link

Template Based Hire/Rehire

Name: Gina Grant

The following information is required before hiring or rehiring a Person.

Template: Hire all types of Administrative Sta

Organizational Relationship: Employee

Country: United States

Category Code: Administrative Positions

Approve

Deny

Recycle

Save

Quit Without Saving

Workflow Status

Details

Go to Top of page

- Click the "Workflow Status" link to view the location of that transaction in the workflow
- Click the "Details" link to view a summary of the charges in the transaction