

**Template-Based Hires and Labor Accounting
Training Guide
January 2018**



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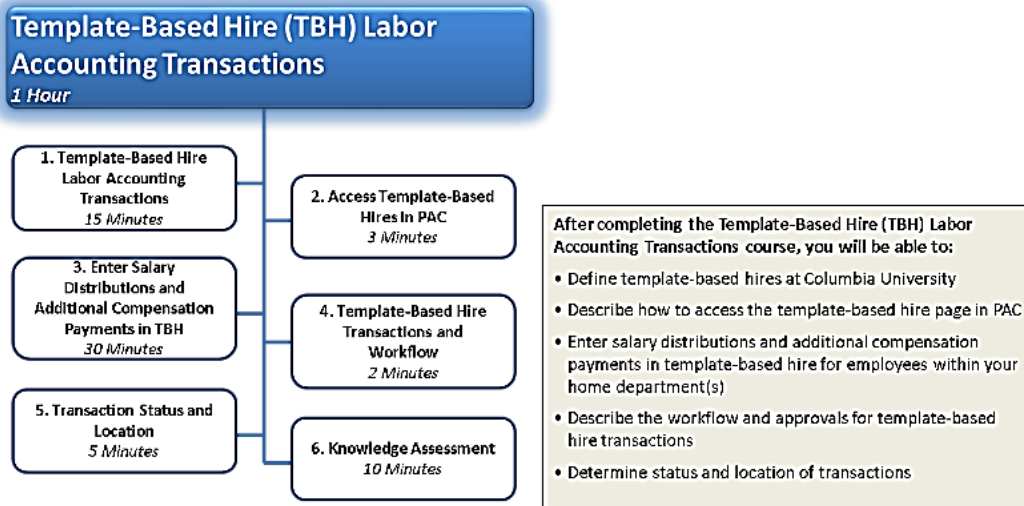
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Template-Based Hires and Labor Accounting

Template-Based Hires and Labor Accounting

This is the *Template-Based Hires and Labor Accounting Transactions* course within the PAC curriculum. Please note that this course is required for all new users of PAC Labor Accounting to gain access to the Template-Based Hire functionality in PAC.

Estimated Time to Complete Lesson: 1 hour



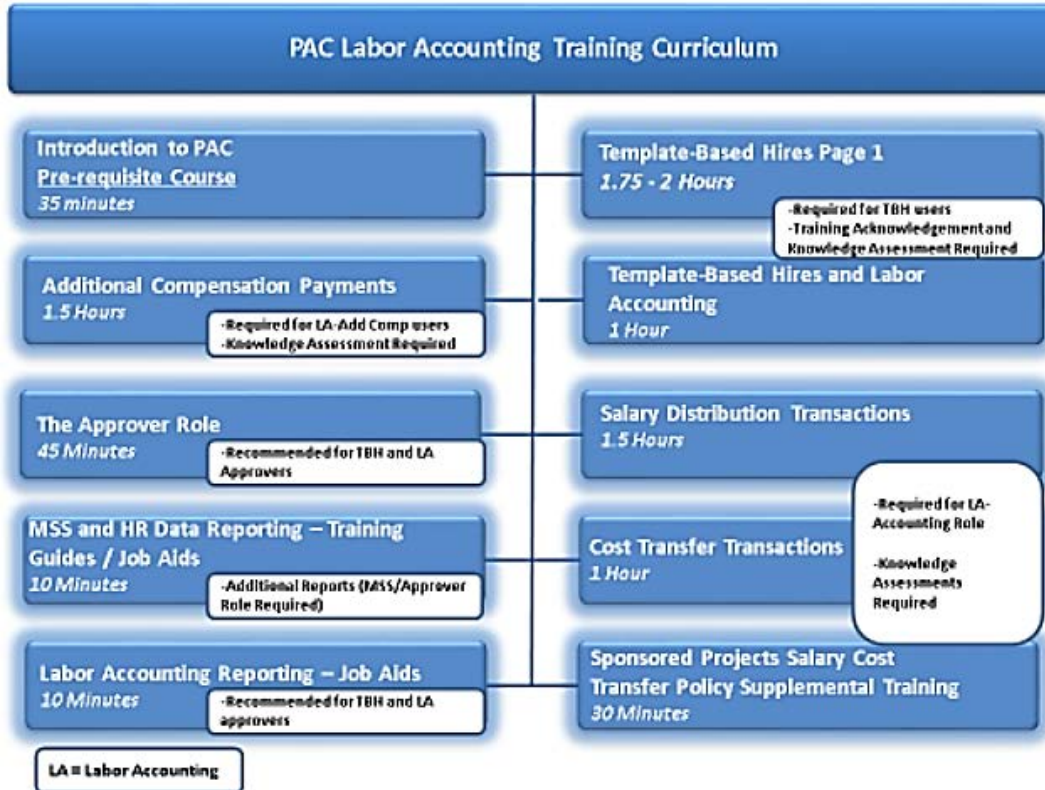
As a new user, there are several steps required to obtain access to TBH and the Labor Accounting system.

- 1) If you haven't already done so, complete the PAC Security Application to request your PAC role(s). Once the application has been approved, you will be notified and receive more information on how to access and complete the training requirements from the PAC Training Administrator. Click here (<http://hr.columbia.edu/course-catalog/search>) to access the PAC Security Handbook located in the Course Catalog in the HR Website for guidance on PAC Security and Access Requests
- 2) Complete the "Template-Based Hires Page 1" training course to learn how to complete page 1 of the template and then complete and submit the Training Acknowledgement at the end of the course
- 3) Complete the "Template-Based Hires and Labor Accounting Transactions" course to learn how to complete page 2 of the template and then complete the "Template-Based Hires and Labor Accounting Knowledge Assessment" and submit your knowledge assessment score (submission is asked for at the end of the knowledge assessment). *A score of 90% or better is required for passing*
- 4) Notify the PAC Training Administrator once the training requirements are completed. You will receive an e-mail from PAC Security once your access is established

PAC Curriculum

PAC Curriculum

This is the *PAC* curriculum. Template-Based Hire courses are included here.



Template-Based Hires and Labor Accounting Defined

This is the *Template-Based Hires and Labor Accounting Defined* lesson of the *Template-Based Hires and Labor Accounting* course. Upon completion of this lesson, you will be able to:

- Define salary distributions and additional compensation payments at Columbia University
- Recall the relationship between ChartFields, ChartStrings and Combination Codes
- Locate and access combination codes

Estimated Time to Complete Lesson: 15 minutes

Key terms display throughout a course as hyperlinks. Clicking on the hyperlink will open a separate window that displays the definition. A comprehensive list of key terms and definitions that appear throughout the course appear in the Glossary at the end of the Training Guide.

Template-Based Hires at Columbia University

Template-Based Hires

Template-Based Hires is a function within People@Columbia (PAC) where new hire and rehire transactions are initiated electronically in the departments and schools through PAC Templates. This function also integrates Salary Distributions and Additional Compensation payments known at the time of hire into the templates.

This course teaches you how to complete the 2nd page of the templates, the labor accounting portion, where you will enter the distribution of regular earnings and additional compensation payments across one or more combination codes.

Page 1 of the templates contains the hire details. For training on completing page 1 of the templates, reference the "Template Based-Hire Page 1" course located in the Course Catalog (<http://hr.columbia.edu/course-catalog/search>) in the HR Website.

Prepare to Enter a TBH Transaction

Prepare to Enter a Template-Based Hire Transaction

Salary distribution and additional compensation payments (known at the time of hire) are entered on page 2 of the hire/rehire template in PAC. The initiator, the person in the home department who completes the entry into the template, gathers the accounting information as well as HR information.

Types of information to include:

- Personal data for the hire
- Position and salary information
- Accounting information and
- Additional compensation information (when applicable)

Salary Distribution in TBH Transactions at Columbia University

What are Salary Distribution Transactions?

A salary distribution is the process by which departments communicate the allocation of regular earnings for faculty and staff to the Accounting and Reporting at Columbia (ARC) system. Departments create salary distribution profiles in PAC which detail the Combo Codes / ChartStrings to which the employee's earnings should be charged. Salary profiles can be modified to reflect the changes both *going forward* and *retroactively*.

For whom do you enter a Salary Distribution transaction?

Salary distribution transactions (both retroactive and go-forward) are created for active employees in your home department. At the time of hire/rehire, a salary profile is created for all faculty and staff via Template-Based Hire (TBH), or by Payroll for employees who could not be hired using TBH. Once an employee is hired into PAC, the employee's salary profile can be modified, by those in the home department with security access to do so, on the Salary Distribution Page in PAC.

Why are Salary Distribution transactions made?

If an employee's salary distribution profile changes, the distribution can be modified to reflect the changes (on the Salary Distribution page in PAC). Training on modifying salary distributions is covered in a separate course.

What happens when a Salary Distribution transaction is entered in PAC?

When you enter the salary distribution into the new hire/rehire template (and also when entered on the Salary Distribution page) in PAC, it communicates to the University's Accounting System (ARC) and "tells" it the specified Combo Code(s)/ChartString(s) to charge an employee's earnings.

Additional Compensation Payments in TBH at Columbia University

What are Additional Compensation Payments?

Additional Compensation Payments are one-time or ongoing payments that are made in addition to regular earnings for active officer level employees only. This includes officers of instruction, research, libraries and administration, plus student officers. Also known as add comp or additional pay.

When you enter an add comp into PAC, you also specify which ChartString(s) should be charged.

Why are Additional Compensation Payments made?

Add comps are made for many reasons, including extra pay for additional duties performed, special one-time payments and ongoing clinical payments of varying types.

With what Frequency are Additional Compensation Payments paid?

An add comp can be paid all in one pay period or be spread out over multiple pay periods.

For whom do you enter an Additional Compensation Payment in TBH?

If known at the time of hire/rehire, an add comp payment may be entered for officers of instruction, research, libraries and administration, plus student officers via Template-Based Hire (TBH). Add comps are optional and thus, not required to complete entry of the template. Once an employee is hired into PAC, add comp payments can be created on the Additional Pay Page in PAC. Training on the additional compensation payments page is covered in a separate course.

Can Additional Compensation Payments be made to employees outside of the home department(s)?

Yes, but not via Template-Based Hire. On the hire/rehire templates, you can only initiate transactions, and thus add comp payments, for employees in your own home (administrative) department(s). If you are charging one or more foreign combination codes, the transaction will move through the workflow and will be routed to the foreign funding departments for approval prior to the employee being hired into PAC and thus the release of the payment(s). Creating add comp payments for employees outside of the home department(s) is covered in the Additional Compensation Transactions course.

What are Non-Officer Additional Payments and how are they paid?

All additional payments for Union and Non Union Support Staff and Casuals, for example OT or shift differential, are handled in the Time Collection Module in FFE.

What happens when an Add Comp payment is entered in TBH?

When you enter an add comp payment in TBH, it is released to the employee (per the payment details entered) and PAC communicates to the University's Accounting System (ARC) and "tells" it the specified Combo Code(s)/ChartString(s) to charge the employee's add comp(s).

Earnings Codes Defined

Earnings Codes - Template-Based Hires

All payroll transactions have an associated Earnings Code (or earn code). An earnings code identifies the type of payment with related tax withholding, benefits information and fringe rate the employee is to receive. This code distinguishes the transaction from other payments by:

- linking the payment to an accounting distribution record
- coding retirement benefits eligibility and fringe rate
- coding tax withholding procedure (whether flat tax or annualized tax rates are used)

Salary Distributions in Template-Based Hire

As Salary Distribution profiles are established for faculty and staff *regular earnings*, the earnings code used for these transactions is **REG** and it is automatically applied to salary distribution transactions.

Additional Compensation Payments in Template-Based Hire

Additional compensation payments can be paid under many earnings codes and every add comp transaction has an Earnings Code. The code is selected when the add comp transaction is created.

Earning codes can be campus, department or employee-type specific (i.e. for summer session instructional payments only). Exercise caution when choosing earnings codes. The earnings codes available for employees may be campus or position specific.

Clinical Earnings Codes

Clinical Earnings Codes/Clinical Faculty Codes

There are a few earnings codes specific to the CUMC campus that are used to pay clinical add comps (both one-time and annual) related to private practice activities. In general, you will use the annual clinical earn codes 005 Tier 1 private practice with benefits and 004 Tier 2 private practice no benefits. These earn codes will automatically require the use of certain combo codes that are associated with clinical attributes in the financial system.

One-time add comp practice payments - Special CUMC only earnings codes have been created for add comp payments being paid under Tier 3 private practice situations.

Benefits Eligible Earnings Codes

Benefits Eligible Earnings Codes

In order for an add comp to be eligible for benefits, an employee must:

- be working continuously on a project plus performing additional responsibilities for at least 8 months or more and the total payment must be \$1,000 or more

Using this criteria, bonuses for exceptional performance are NOT benefits eligible. However, certain add comps such as summer session instructional payments are benefits eligible even though the work is performed for less than 8 months.

Fringe Benefit Rate

What is the Fringe Benefit Rate?

Fringe Benefit Rate is the percentage charged to departments applied to salaries as they are paid out and charged in ARC. Fringe is used to fund the Columbia University paid benefits (pension, medical, etc.) and tax-related expenses (FICA, Medicare, etc.).



How is Fringe Calculated in PAC Labor Accounting?

The fringe benefit rate is determined by the PAC system based on multiple criteria

- earnings type (earn code)
- employee attributes (e.g. student status, job code, etc)
- project attributes (e.g. grants)

Click here (<http://finance.columbia.edu/content/fringe-benefit-rates>) for more information on Fringe Benefit Charges.

ChartFields ChartStrings and Combination Codes

ChartFields ChartStrings and Combination Codes

ChartFields, ChartStrings and Combination Codes are used to indicate the allocation of charges. The following topics describe these terms and how they are used in PAC.

ChartFields

ChartFields

ChartFields store the Chart of Accounts (COA) and provide the system with the basic structure to segregate and categorize transactional and budget data.

Following is a recap of the ChartFields and their definitions learned in the *Introduction to ARC* lesson. For information on the ChartField values used in your department/school, see your Finance/Business Manager.

The selection of *ChartFields* ultimately creates the *ChartString* and the *Combination Code* used in financial transactions.

- The **ChartString** is what is being charged in ARC
- In PAC, a combination, or **combo code**, is entered in a transaction to indicate what ChartString to charge. The combo code is the "label" for the ChartString
- When requesting a combination code in PAC, "Fund" and "Function" are not selected as these fields are derived in ARC based on the other ChartFields selected. "Site" is only required for a capital project

ChartField	Characters (length)	Definition	Required on transaction
Business Unit	5 (e.g. COLUM - Columbia University)	Legal entity for which financial statements are produced.	Required on all transactions
Account	5 (e.g. 40000 -TUITION)	Used to capture the natural classification of the transaction. Accounts begin with numbers 1-7: 1 = Assets 2 = Liabilities 3 = Fund Balances 4 = Revenue 5 = Salaries and Fringe 6 = OTPS 7 = Internal Transfers	Required on all transactions
Department	7 (e.g. 0102102 - PRE Office of the President)	Hierarchical breakdown to track financial activity within the organizational structure.	Required on all transactions
PC Business Unit	5 (e.g. CAPTL – Capital Projects)	High level project type. There are three PC Business Units to select from: • Capital • Sponsored Project • General	Required on all transactions
Project	8 (e.g. CP001005 - AR AUDITORIUM)	Associates expenses with a specific funding source. Projects are set up for the following reasons: • Funding is externally restricted in purpose or time • Funding is unrestricted or internally restricted and is of a significant nature (e.g., used to fund several uses) and for which fund balance is carried forward • Project to date reporting is required and is different from fiscal year reporting • Project has a defined beginning and end	Required on all transactions

ChartFields cont.

ChartFields, cont.

Below is the continuation of ChartField Definitions. To see this information in a job aid, access the "ChartFields, ChartStrings and Combination Codes in PAC Job Aid (<http://hr.columbia.edu/course-catalog/search>)" located in the Course Catalog in the HR Website.

ChartField	Characters (length)	Definition	Required on transaction
Activity	2 (e.g. 01 – AR AUDITORIUM)	Work break down structure for the associated Project.	Required on all transactions Note: For fiscal year projects the activity will always be 01.
Initiative	5 (e.g. 41116 - BUS Master of Business Admin)	Used track financial activity related to Academic Programs or Business Activities.	Only required for revenue, expense, and internal transfer transactions *If the transaction does not call for a specific initiative, use the undefined initiative value: 00000
Segment	Max 8* *UNIs can be fewer than 8 characters (e.g. atj510 - Dr. Albert Jones; 51000105 - BUS London Intl Seminar)	Used to track components of Academic Programs or Business Activities, usually a person or thing.	Only required for revenue, expense, and internal transfer transactions *If the transaction does not call for a specific segment, use the undefined segment value: 00000000
Site	4 (e.g. 1002 - BROADWAY RESIDENCE HALL)	Building Number or Country Code	Only required for Capital projects but should be used when applicable
Fund	2 (e.g. 01 – General Unrestricted Fund)	Fund Type	This ChartField will default from other ChartFields
Function	3 (e.g. 010 – TUITION)	Categorization of revenues, expenses, and internal transfers for all Profit and Loss (P&L) transactions. This is the COB line and the categorization of functional expense on the Financial Statements.	This ChartField will default from other ChartFields

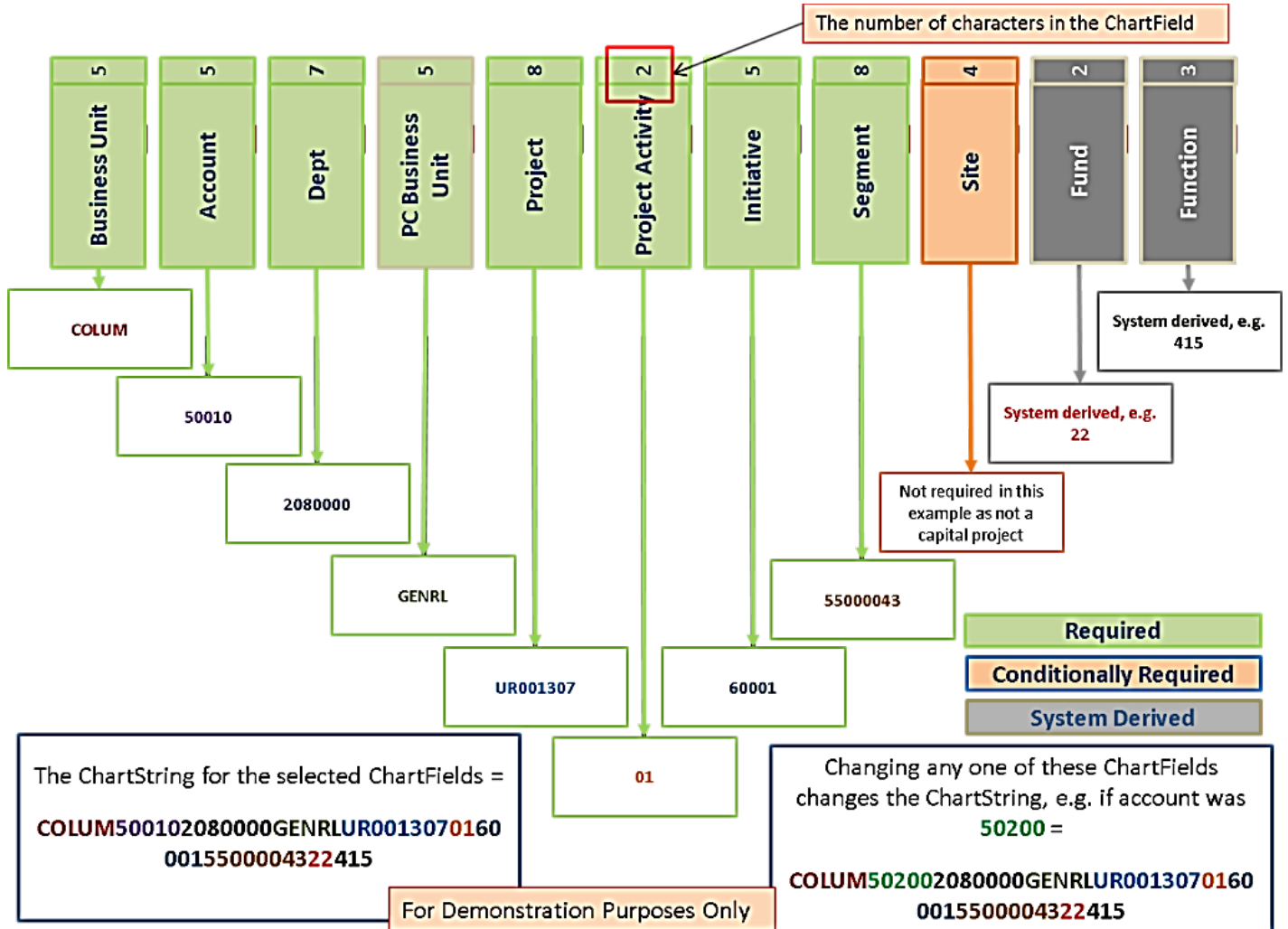
ChartString

ChartString

The combination of ChartFields that identify where accounting charges and credits are applied. ChartStrings are created and housed in ARC when the 11 ChartField components are identified for expense allocation.

When each ChartField is selected, the associated numbers/characters for that field are joined together with other ChartFields to make the ChartString. Each ChartField component has its own number of characters. Joining all the required ChartFields together creates a unique ChartString.

How ChartField Values become a ChartString



Combination Codes

Combination Code or Combo Code

A combo code is a 10-digit system-generated number representing a unique ChartString and is required by the PAC system to assign labor charges. It is not a characteristic of the ChartString, it is a representation of it. This is similar to how an Employee ID is generated. Each employee is assigned a system-generated 8-digit ID that represents them in the system. The number is not a characteristic of the employee, but represents their identity in the system.

Combo codes are used in all TBH and Labor Accounting transactions to indicate how a charge is to be allocated. Think of the combo code as a “label” for the ChartString.

Combo Code Description

A combo code description is a numeric descriptor to help identify the ChartString represented. It is displayed in transactions next to the combo code and will show in this order: Natural Account, Project, Initiative, Segment and Activity.

Combination Code Table

Set ID CUSET

GL Combination Code 1000274478 ← System generated 10 digit combo code

Combination Code Detail Find | View All First 1 of 1 Last

Effective Date 12/18/2014 Status Active

Description 50010-UR005349-60001-55000043 ← Combo code description

Short Desc Short Valid Value

ChartField Detail		
ARC Business Unit :	COLUM	Columbia University
Account :	50010	PROF (TENURED)
Department :	TRAIN02	Training Dept 2
PC BU :	GENRL	General
Project/Grant :	UR005349	TRAIN02 Project
Activity ID :	01	TRAIN02 Project
Initiative :	60001	LAW Research
Segment :	55000043	LAW Parker Professor
Site :		

Components and order of the Combo Code Description

Putting it Together - ChartFields ChartStrings and Combo Codes

Putting it All Together - ChartFields, ChartStrings, and Combination (Combo) Codes

ChartFields are the fields that store the Chart of Accounts (COA) and provide the system with the basic structure to segregate and categorize financial activity.

ChartStrings are the unique combinations of ChartFields to which accounting charges and credits are applied. The ChartString is what is charged in ARC. ChartStrings can be as long as 54 characters.

Combination, or Combo Code is the 10-digit system-generated number representing a unique ChartString. It is not a characteristic of the ChartString, it is a representation of it. Combo codes are used in PAC to assign labor charges. Think of the combo code as a “label” for the ChartString. Combo codes are used in all TBH and Labor Accounting transactions to indicate how a charge is to be allocated.

Using the ChartString example we saw earlier, a combo code generated by PAC could be “1000030781.” This 10-digit number is not a characteristic of the ChartString (COLUM500102080000GENRLUR00130701600015500004322415), but represents it in PAC.

Meaning that, whenever the combo code 1000030781 is used in a PAC transaction, the ChartString it represents, COLUM500102080000GENRLUR00130701600015500004322415, will be charged.

Access the ChartFields, ChartStrings, and Combination (Combo) Codes Job Aid (<http://hr.columbia.edu/course-catalog/search>) for reference located in the Course Catalog on the HR Website.

Combination Codes and Template-Based Hire Transactions

Combo Codes and Template-Based Hire Transactions

The Combination Code field is located on all TBH and LA transactions to indicate the funding for the transaction. If the combo code is known, enter it into the Combination Code field and press enter. If it is a valid code, the Description and Combo Code Department will populate on the screen.

Users have unrestricted access to search for combo codes based on earning code edits. A user can search for and select combo codes in any department. When using the search feature and after selecting the ChartField parameters, only those combo codes valid for the earnings code selected and employee type will appear.

Locate and Select Combo Codes

Locate and Select Combo Codes

To search for a combo code, click on the magnifying glass next to the Combination Code field. Populate three or more ChartField values and click search. Combo codes with those values appear in the results list displayed. Click any link on the needed combo code line and it will populate into the PAC page field.

To search for a combo code:

1. Click on the magnifying glass to bring up the search feature
2. Populate a **minimum of three** or more ChartField values
3. Click "Look Up"
4. Click any link on the needed combo code line and it will populate into the PAC page field

In this example, values are entered in the "ARC Business Unit", "Account" and "Department" fields. Combo codes with those values appear in the results list displayed

Note: the more ChartField values entered in the search, the smaller, or more direct, results list is displayed.

For example, if all 9 ChartField values are entered, one combo code will display in the search results list.

Combination Code	Description
1000291212 53300-UR003343-00000	
1000314504 53300-UR003343-41500	

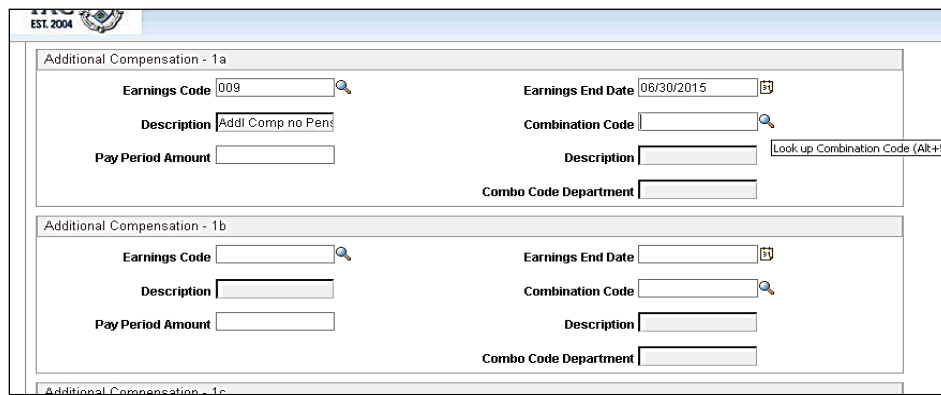
Search for a Combo Code


Let's practice selecting a combo code by entering criteria into the search feature.

Procedure

This is the Search for a Combo Code topic where you will learn how to search for a combination code within a Template-Based Hire transaction.

Step	Action
1.	This is the Additional Compensation Section in a Template-Based Hire transaction.



Step	Action
2.	To search for a combo code, Click the Look Up Combo Code button.
3.	The Search Combination Codes page appears. Populate <i>three</i> or more ChartField values and click search. In this example, we are searching by entering the ARC Business Unit, Account and Department. First, click the Look up ARC Business Unit button. 
4.	A list appears in the Search Results section of the page. For this example - Click the COLUM link. COLUM

Search Combination Codes

Combination Code

ARC Business Unit Columbia University Initiative

Account Segment

Department Site

PC BU

Project/Grant

Activity ID

Step	Action
5.	Now let's search for the account. Click the Look up Account button.
6.	In addition to the items that appear in the Search Results section of the page, you can search for an individual ChartField as well. For this example, let's search for an account that begins with "53". To search for an Account, first click in the Account field.
7.	Enter search information into the Account field. In this example, I am not sure of the exact number but know it begins with "53". Let's enter " 53 ".
8.	Click the Look Up button.
9.	All accounts that begin with "53" appear. Click the OFFICER OF ADMINISTRATION link. OFFICER OF ADMINISTRATION
10.	Now let's narrow down the search by department. Click the Look up Department button next to the Department field.
11.	You can enter the department number into the "Department" field or the department name into the "Description" field. For this example, search for the department by entering the name of the department. Enter " TRAIN " into the Description field. Note: If the "Description" field is not showing, ensure the "Advanced Lookup" is enabled by clicking the link. In this screen print you can tell it's enabled by the display of the "Basic Lookup" link. Clicking "Basic Lookup" returns you to the basic search with only the "Department" field displayed.
12.	Click the Look Up button. <input type="button" value="Look Up"/>

Step	Action
13.	<p>A list of departments beginning with "TRAIN" appear. Select the department from the list.</p> <p>Note: A funding department can only be a level 8 department (does not end in an 'x'). TRAIN01 is for training purposes only.</p> <p>For this example, click the TRAIN01 link.</p> <p>TRAIN01</p>
14.	<p>Now we have three ChartField data fields entered -</p> <p>Click the Search button.</p> <p>Look Up</p>
15.	<p>A list of combo codes that match the search criteria entered appear.</p> <p>Click on any of the underlined links within the needed combo code.</p> <p>For this example click "1000291212."</p> <p>1000291212</p>
16.	<p>The selected combo code appears in the Combination Code field. The Combo Code description also displays as well as the Combination Code Department number and name.</p>
17.	<p>You have successfully completed "Search for a Combo Code" topic. You can now move on to the next lesson, "System Created Combo Codes" where you will learn how PAC creates combo codes.</p> <p>End of Procedure.</p>

Create Combo Codes

Create Combo Codes

Combo codes are added to PAC in two ways.

1. New ChartStrings created in the Payroll module of the Budget Tool will generate a combo code in PAC for that ChartString with various natural account values
2. Specific users who have the "Create Combo Code" role in PAC can create combo codes in real time

Let's explore this process for creating combo codes.

New Combo Code Request Process

New Combo Code Request Process

What happens if a ChartString is not in the system and is needed for a transaction?

If a ChartString is needed for a transaction and the combo code has not been created for that ChartString, it is easy to create a new combo code in PAC. The Create Combo Code role in PAC enables users to create combo codes in real time. If you have this security role, a summary of the steps is below. If you do not have this new role, you can contact the person in your School/Admin unit who has it and have them create the combo code.

1. Save and close the transaction
2. If you have the "Create Combo Code" security role, navigate to the New Combo Code request page and follow the steps below. In addition, access the Create Combo Code Job Aid (<http://hr.columbia.edu/course-catalog/search>) for detailed information (located in the Course Catalog on the HR Website)
3. Once the new combo code has been created it is ready to use. Open the saved transaction and the new combo code will appear in the search list

Note: The "Create Combo Code" role allows users to create combo codes in PAC. This role cannot delete combo codes and there is no workflow approval required to create a combo code.



Remember – ChartFields exist in ARC and ARC syncs instantaneously to PAC. However, if the particular ChartString (combination of ChartFields) does not have a corresponding combo code, a new one can be created in real-time.

Adding a new combo code to PAC is easy. Users with the "Combo Code Create" Role can create new combo codes in real-time.



Edits will run to check for valid ChartFields and provide a description (if available). The description is a system generated value and does not require user entry.

Once the edits complete and run satisfactorily, the system generates the next sequential new combo code number, which can be used immediately in PAC transactions.

New Combo Code Request Process Screen Prints

New Combo Code Request Process Screen Prints

Below are screen prints of the steps to request a new combo code.

To request a new combo code:

1. Navigate to the Combination Code Table in MSS
2. Click the "Add a New Value" tab
3. Click "Add"
4. Enter the "Effective Date" for the combo code – this is required. **Note:** the effective date cannot be earlier than July 7, 2012 and cannot be earlier than the effective dates of the ChartFields
5. Enter a value for each required ChartField. An '*' equals a required field
6. Click "Save"

If a ChartField does not exist it will not populate into the field. Request a new ChartField in ARC (limited to select users) and once it is approved and created in ARC, it will be available in PAC to create new combo codes.

New Combo Code Request ChartField Selection Rules

New Combo Code Request ChartField Definitions and Guidelines

ChartFields are created in ARC and ARC syncs instantaneously to PAC. Edits will run to check to ensure that the Combo Code is valid (that is, all selected ChartFields are active).

When selecting ChartFields, follow the guidelines below.

Chart Field	Definition and Guidelines
ARC Business Unit	<p>School and Department users will select the appropriate business unit from the drop down</p> <ul style="list-style-type: none"> • The valid Business Units for Schools and Departments are: <ul style="list-style-type: none"> ○ COLUM* - Columbia University ○ AGENC – Other Agencies ○ AMERI – American Assembly ○ COCIN – Columbia Ophthalmology Consult ○ CUCIP – Center for International Progr ○ CUELI – Columbia Consol Elimination BU ○ CUHCI – Columbia University Healthcare ○ CUPRE – Columbia University Press ○ KRAFT – Kraft Center ○ NJDOC – Columbia Doctors of New Jersey ○ REIDH – Reid Hall ○ RPARD – CUPR Employees Arden Conf Ctr ○ RPDEF – 457(b) Deferred Comp Plan ○ RPOFF – CURP for Officers of Columbia ○ RPVRS – Voluntary Retirement Sav Plan <p>*COLUM is the most frequently used business unit</p>
Account	All payroll accounts begin with "5" and are in the range 50000 – 58999
Department	<p>Only users with PAC DAF authority to the department can choose the department</p> <ul style="list-style-type: none"> • This ChartField must be chosen before PC Business Unit and Project • Can only be a level 8 department (does not end in an 'x')
PC Business Unit	<ul style="list-style-type: none"> • SPONS – Only projects that begin with GG or PG will display in the project drop down list • CAPLT – Only projects that begin with CP will display in the project drop down list • GENRL – Only projects that do not begin with the above will be displayed
Project	<p>Once department and PC business unit are selected, project will only show projects with a relationship to the department and PCBU selected</p> <p>NOTE: To select a Project for a combo code, there has to be a fiscal budget created for the project/department relationship (<i>including \$0 budgets</i>). If the Project exists and the project/department relationship does not have a fiscal budget, it will not appear and thus cannot be charged. See your budget/financial representative to determine if the budget should be created in ARC.</p>
Activity	Once project has been selected, only the activities related to the specific project will be displayed
Initiative	Select value from drop down list
Segment	Select value from drop down list
Site	Only required with capital projects (those that begin with CP)
Fund	Will be derived in ARC
Function	Will be derived in ARC

New Combo Code Request Result

New Combo Code

And the Combo Code is created!

Combination Code Table	
Set ID	CUSET
GL Combination Code	1000274479
Combination Code Detail Find View All First 1 of 1 Last	
Effective Date	12/19/2014 Status Active
Description	50130-UR005349-10004-00000000
Short Desc	50130-UR00 <input checked="" type="checkbox"/> Valid Value

ChartField Detail	
ARC Business Unit :	COLUM <input type="text"/> Columbia University
Account :	50130 <input type="text"/> INSTRUCTOR (FT)
Department :	TRAIN02 <input type="text"/> Training Dept 2
PC BU :	GENRL <input type="text"/> General
Project/Grant :	UR005349 <input type="text"/> TRAIN02 Project
Activity ID :	01 <input type="text"/> TRAIN02 Project
Initiative :	10004 <input type="text"/> Communications
Segment :	00000000 <input type="text"/> Undefined Segment
Site :	3058 <input type="text"/> 635 WEST 131ST STREET

Combo Code is created.
Sample view only

Will PAC create duplicate combo codes?

- No – there are edits in place that check for existing combo codes when requesting a new one.

What happens if two people are requesting a new combo code at the same time?

- The first person to click “save” will create the combo code. The second person will receive a message that the code already exists and provide that code on the screen.



Once the new combo code is created, it is ready for use.

If, in the middle of a transaction, you need to request a new combo code, save and close the transaction first. Why? Since the combo code did not exist when you started the transaction, you need to generate a new combo code search after the required combo code is created. Save the transaction, re-open it and the combo code can then be used.

Request and Create a New Combo Code

Let's practice creating a combo code in PAC.

Procedure




This is the Request and Create a New Combo Code topic where you will learn how to create a new combination code in PAC.

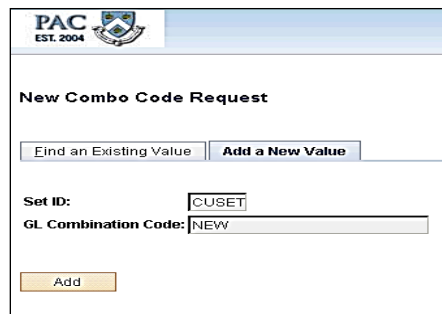
Step	Action
1.	Click the Main Menu button.
2.	To navigate to the New Combo Code Request section of PAC, first click the Manager Self Service link.


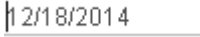
Training Guide

Template-Based Hires and Labor Accounting



Step	Action
3.	Click the Labor Accounting menu.  Labor Accounting ▶
4.	Click the New Combo Code Request menu.  New Combo Code Request ▶
5.	Click the New Combo Code Request menu.  New Combo Code Request



Step	Action
6.	There are two tabs on the New Combo Code Request page, one to "Add a New Value" and one to "Find an Existing Value". Creating combo codes are completed in the "Add a New Value" tab. From here, click the Add button. 
7.	Enter the effective date for the new combo code. Enter the date into the Effective Date field. For this example, enter " 12/18/2014 ". 
8.	Enter the ChartField values to create the combo code. First, click the Look up Chartfield Value button next to the ARC Business Unit field.

Step	Action
9.	Select the Business Unit from the list. For this example, click the COLUM link. COLUM

Combination Code Table

Set ID CUSET
GL Combination Code NEW

Combination Code Detail Find | View All First 1 of 1 Last

*Effective Date 12/18/2014 *Status Active

*Description
Short Desc Valid Value

ChartField Detail

ARC Business Unit :	COLUM	Columbia University
Account :		
Department :		
PC BU :		
Project/Grant :		
Activity ID :		
Initiative :		
Segment :		
Site :		

Step	Action
10.	Next, select the Account. Click the Look up Chartfield Value button next to the Account field.
11.	There are search fields on the top of the page to assist you in locating an account. Search for and select the needed Account. For this example, click the INSTRUCTOR (FT) link. INSTRUCTOR (FT)

Combination Code Table

Set ID CUSET
GL Combination Code NEW

Combination Code Detail Find | View All First 1 of 1 Last

*Effective Date 12/18/2014 *Status Active

*Description 50130-
Short Desc Valid Value

ChartField Detail

ARC Business Unit :	COLUM	Columbia University
Account :	50130	INSTRUCTOR (FT)
Department :		

Step	Action
12.	<p>Next, select the Department for the Combo Code.</p> <p>Note: The Department ChartField must be chosen before PC Business Unit and Project.</p> <p>Click the Look up Chartfield Value button next to the Department field.</p>
13.	<p>There are search fields on the top of the page to assist you in locating a department. Search for and select the needed department.</p> <p>For this example, click the Training Department 2 link.</p> <p>Training Dept 2</p>

Combination Code Table

Set ID CUSET
 GL Combination Code NEW


Combination Code Detail Find | View All First 1 of 1 Last

*Effective Date 12/18/2014 *Status Active

*Description 50130- Short Desc Valid Value

ChartField Detail

ARC Business Unit :	COLUM	Columbia University
Account :	50130	INSTRUCTOR (FT)
Department :	TRAIN02	Training Dept 2
PC BU :		

Step	Action
14.	<p>Next, select the PC Business Unit (BU).</p> <p>Click the Look up Chartfield Value button next to the PC BU field.</p>
15.	<p>For this example, click the General link.</p> <p>General</p>
16.	<p>Next, select the Project/Grant.</p> <p>Click the Look up Chartfield Value button next to the Project/Grant field.</p> <p></p>
17.	<p>For this example, click the TRAIN02 Project link.</p> <p>TRAIN02 Project</p>

Step	Action
18.	Next, select the Activity ID. Click the Look up Chartfield Value button next to the Activity ID field.
19.	For this example, click the TRAIN02 Project link. TRAIN02 Project
20.	Next, select the Initiative. Click the Look up Chartfield Value button next to the Initiative field.
21.	For this example, click the Communications link. Communications
22.	Next, select the Segment. Click the Look up Chartfield Value button next to the Segment field.
23.	For this example, click the Undefined Segment link. Undefined Segment

Combination Code Table

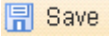
Set ID CUSET
GL Combination Code NEW

Combination Code Detail Find | View All First 1 of 1 Last

*Effective Date *Status

*Description Short Desc Valid Value

ChartField Detail		
ARC Business Unit :	<input type="text" value="COLUM"/>	Columbia University
Account :	<input type="text" value="50130"/>	INSTRUCTOR (FT)
Department :	<input type="text" value="TRAIN02"/>	Training Dept 2
PC BU :	<input type="text" value="GENRL"/>	General
Project/Grant :	<input type="text" value="UR005349"/>	TRAIN02 Project
Activity ID :	<input type="text" value="01"/>	TRAIN02 Project
Initiative :	<input type="text" value="10004"/>	Communications
Segment :	<input type="text" value="00000000"/>	Undefined Segment
Site :	<input type="text"/>	

Step	Action
24.	Click the Save button. 
25.	And the combo code is created! Note the number on the top of the page. Once it is created it is ready for use.
26.	You have successfully completed the "Request and Create a New Combo Code" topic. You can now move on to the next lesson, "Access Template-Based Hire Functionality in PAC" where you will learn how to access the Template-Based Hire functionality in PAC. End of Procedure.

Access Template-Based Hire Functionality in PAC

This is the *Access Template-Based Hires Page* lesson of the *Template-Based Hire and Labor Accounting Transactions* course. Upon completion of this lesson, you will be able to:

- Demonstrate how to access the Template-Based Hire Functionality in PAC and select a template

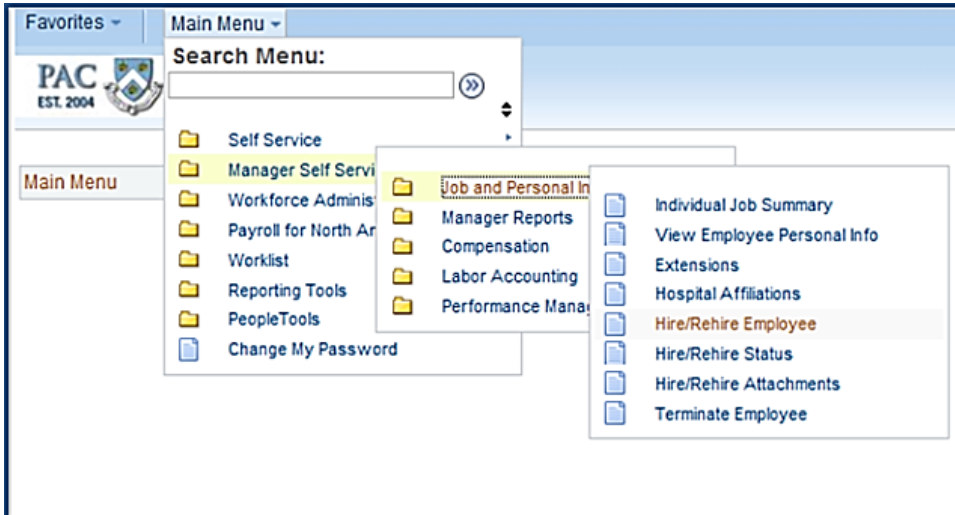
For a refresher on how to access PAC, see the *Introduction to PAC* course.

Estimated Time to Complete Lesson: 3 minutes

Select a Template and Navigate to the Labor Accounting Section

Access Template-Based Hire Functionality in PAC

1. Navigate to the 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:
 - 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



Initiate a TBH Transaction

Initiating a TBH Transaction

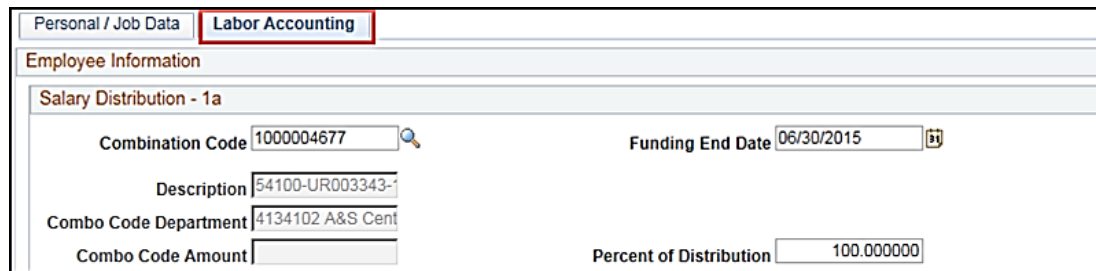
When you select a template, the 1st screen displays the job effective date (or hire date) for the person. This date defaults to today's date but you must change this to the employee's hire date (if it isn't today's date).

This effective date is also the effective date of the salary distribution profile and the period start date for any additional compensation entered on the template. Salary distributions and add comp payments with future effective dates are entered on separate PAC page and training for those pages is covered in their respective courses.

HR data is entered on the 1st page of the hire/rehire template. Once the information on page 1 is entered, you are ready to move to page 2 of the template where the Financial/Accounting information is entered. At the top of page 1 is the "Labor Accounting" tab that brings you to the 2nd page of the template where the accounting data is entered.

Note:

Training on how to complete Page 1 of the Hire/Rehire templates is located in the Course Catalog on the HR Website.



Personal / Job Data	Labor Accounting
Employee Information	
Salary Distribution - 1a	
Combination Code	1000004677
Funding End Date	06/30/2015
Description	54100-UR003343-1
Combo Code Department	4134102 A&S Cent
Combo Code Amount	
Percent of Distribution	100.000000



Let's see a demonstration of initiating a TBH transaction.

Select a TBH Template and Navigate to the Labor Accounting Section

Let's select and open a template within the Template-Based Hire functionality in PAC.

Procedure

This is the "Select a TBH Template" topic where you will learn how to select a hire/rehire template in PAC and navigate to the Labor Accounting section of the template.

Step	Action
1.	Click the Main Menu button. 
2.	Click the Manager Self Service menu. 

Training Guide

Template-Based Hires and Labor Accounting



Step	Action
3.	Click the Job and Personal Information menu.
4.	Once you access the "Hire/Rehire Employee" section within the "Manager Self Service" Section, we can select and open a template. Click the Hire/Rehire Employee menu.

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 Personalize Find | First 1 of 1 Last

Select	Transaction Type	Effective Date	Name	Person ID	Action	Country
<input type="checkbox"/>	HIRE	02/03/2015	George Elliot	NEW	Hire	United States

Delete Selected Transactions

Step	Action
5.	Click the Look up Glass-Select Template button.
6.	You arrived at the Template-Based Hire Template Selection section where you select the template required for the hire/rehire transaction. For this example - Click the HIRE-ADMIN link.

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

Transaction Template ?

Transaction Type **All**

Select Template **HIRE-ADMIN** Hire all types of Administrative Staff

Create Transaction


Transaction Type **All** Refresh

Transactions in Progress Personalize Find | First 1 of 1 Last

Select	Transaction Type	Effective Date	Name	Person ID	Action	Country
<input type="checkbox"/>	HIRE	02/03/2015	George Elliot	NEW	Hire	United States

Delete Selected Transactions

Go To [Hire/Rehire Status](#)

Step	Action
7.	Once you select a template, the selection is displayed in the "Select Template" field. Click the Create Transaction button. 
8.	Once you select a template, you arrive at the "Enter Hire Details" page. Read the information to confirm that you selected the correct template for the type of hire. The Job Eff Date (Hire Date) field defaults to today's date as PAC does not know the hire/rehire date for the employee. Enter the employee's hire date into this field (if it isn't today's date). First, click in the Job Eff Date (Hire Date) field.

Step	Action
9.	<p>Delete the date that defaulted and enter the employee's hire (or rehire) date.</p> <p>In this example, highlight the date by pressing the left mouse button and drag the mouse to select the date.</p>

Template Based Hire/Rehire

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

Template Hire all types of Administrative Staff

Organizational Relationship Employee

Country United States

Category Code Administrative Positions

***Employee ID**

***Job Eff Date (Hire Date)**

Action Hire

Reason Code New Hire

Step	Action
10.	<p>Enter the employee's hire date into the Job Eff Date (Hire Date) field.</p> <p>In this example, enter "02/09/2015".</p>
11.	<p>Click the Continue button.</p> <div style="text-align: center; margin-top: 10px;"> <input type="button" value="Continue"/> </div>
12.	<p>You arrived at Page 1 of the Template where you enter the hire details for the employee.</p> <p>For training on how to complete page 1 of the templates, you may sign up for a classroom session. The training schedule and registration is available on the PAC Resources Webpage on the TIG.</p> <p>Let's continue on to the Labor Accounting section of the templates.</p>
13.	<p>Once the data is entered on page 1, you may navigate to the Labor Accounting portion of the template.</p> <p>Click the Labor Accounting tab.</p> <div style="text-align: center; margin-top: 10px;"> <input type="button" value="Labor Accounting"/> </div>
14.	<p>You arrived at page 2 of the template, which is the Labor Accounting section.</p> <p>Note that the effective date entered is the effective date on page 2 of the template.</p>
15.	<p>You have successfully selected and opened a template within the Template-Based Hire functionality in PAC and navigated to page 2 of the template where the Labor Accounting information is entered. You can now move on to the next lesson, "Enter Salary Distributions and Additional Compensation Payments in Template-Based Hire" where you will learn how to complete the Salary Distribution and Additional Compensation sections within a template.</p> <p>End of Procedure.</p>

Enter Salary Distributions and Additional Compensation Payments in TBH

This is the *Enter Salary Distributions and Additional Compensation Payments in Template-Based Hire* lesson of the *Template-Based Hire and Labor Accounting Transactions* course. Upon completion of this lesson, you will be able to:

- Enter a Salary Distribution for a New Hire/Rehire, Identify Fields Requiring Data Input and Use the Search Feature (Look Up Glass) to search for Field Values
- Enter Additional Compensation Payments for a New Hire/Rehire, Identify Fields Requiring Data Input and Use the Search Feature (Look Up Glass) to search for Field Values

Estimated Time to Complete Lesson: 30 minutes

Salary Distribution Section in TBH

Salary Distribution Section of the TBH Template

Here is what the salary distribution section looks like. This section must be completed to submit the transaction. You can enter up to 2 (two) different funding allocations - in the Academic and Clinical templates currently, will be applied to the Administrative templates. You will see additional sections in the Administrative templates until the update is made.

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 effective date for the employee's salary distribution is the Job Effective Date (Hire Date) that was entered when initially entering information into the template. There is not a separate "begin date" to enter in this section.

Let's explore each of these fields.

*Job Eff Date (Hire Date): 10/11/2017	
Personal / Job Data	Labor Accounting
Employee Information	
Salary Distribution - 1a	
Combination Code: 1000003463	Funding End Date: 06/30/2018
Description: 53300-UR003343-25000-000000	
Combo Code Department: 4024102 A&S Germanic Languag	Percent of Distribution: 100.000000
Combo Code Amount:	
Salary Distribution - 1b	
Combination Code:	Funding End Date:
Description:	
Combo Code Department:	Percent of Distribution:
Combo Code Amount:	
Salary Distribution Comments	
Comments:	

Completing the Salary Distribution Section in TBH

Completing the Salary Distribution Section in TBH

Here is an example of a completed salary distribution section in TBH where the employee's regular earnings are charged 100% to a single combination code.

Note: The effective date for the employee's salary distribution is the Job Effective Date (Hire Date) that was entered when initially entering information into the template. There is not a separate "begin date" to enter in this section.

If there is no additional compensation for this transaction, clicking on "Save and Submit" will submit the transaction into the workflow for approver review. We'll discuss saving and submitting transactions and workflow a bit later in the lesson.

Let's explore each of these fields.

Personal / Job Data		Labor Accounting	
Employee Information			
Salary Distribution - 1a			
Combination Code	1000004677	Funding End Date	06/30/2016
Description	54100-UR003343-1		
Combo Code Department	4134102 A&S Cent		
Combo Code Amount		Percent of Distribution	100.000000

Combination Codes

Combination Codes in Salary Distributions

Recall that the combination code in a salary distribution identifies the ChartFields to charge regular earnings in ARC. In the Combination Code field, enter the combo code to which you want to allocate part or all of the employee's salary.

Once a combo code is entered or selected using the search feature, the description of that combo code appears along with the "Combination Code Department" number and name. See the topic "Search for a Combo Code" for a simulation on how to search for combo codes.

You can enter the combo code directly into the field, if you know it, or search for the code by clicking on the magnifying glass icon next to the combination code field and then entering at least three items in the search criteria. The combo code list is restricted based on the earnings code (REG). That is, PAC will not let you charge a combo code that is invalid for that earnings code.

Can I distribute salary to Foreign Department Combo Codes?

When creating a new salary distribution you may charge your own combo codes or foreign department combo codes. If charging one or more foreign department combo codes, the transaction will route to all foreign funding department approvers after home department approval.

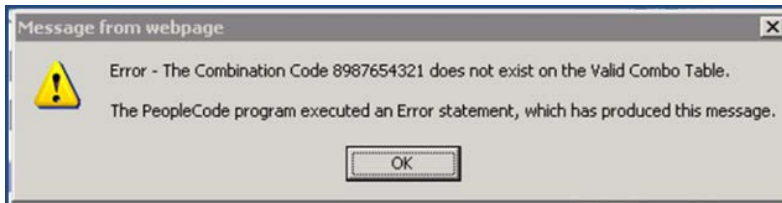
As template-based hire transactions are established for employees in your own admin department(s), you cannot initiate a TBH transaction for an employee who is not currently in your admin department(s).

Personal / Job Data		Labor Accounting	
Employee Information			
Salary Distribution - 1a			
Combination Code	<input type="text" value="1000004677"/>	Funding End Date	<input type="text" value="06/30/2016"/>
Description	<input type="text" value="54100-UR003343-"/>		
Combo Code Department	<input type="text" value="4134102 A&S Cent"/>		
Combo Code Amount	<input type="text"/>	Percent of Distribution	<input type="text" value="100.000000"/>

Combination Code Errors

Combination Code Errors

After entering the combo code in the field and then either pressing the *Enter* key or tabbing or clicking into another field, PAC will run edits to check the validity of the combo code. If the entered combination code is invalid or does not exist, you will not be able to save or proceed with the transaction. The entry field will turn red and PAC will generate a pop-up window with a message related to the error such as, "Invalid combination code value. Please check the value and re-enter or use the search page to find a valid value." Or, "The Combination Code 1234567898 (e.g.) does not exist on the Valid Combo Table."



There are many reasons why a combo code is invalid. Let's look at a few of these and explore correcting the errors.

Correcting Combination Code Errors

Correcting Combination Code Errors

Here are some examples of combination code errors and reasons why they appear. Depending on the error, you may need to research the attributes with your department to resolve the error. Once you have the correct combo code, or the correct combo code is valid in PAC, you may enter the transaction.

- **Inactive Combo Code** - An inactive combo code is a "frozen" combo code that cannot be used for any transactions. Check if the combination code is inactive. For example, if a project is active from 1/1/15 - 12/31/17, the combo code(s) for that project will become inactive on 1/1/18
- **Project Activity Date Errors** - This occurs when the transaction dates fall outside of the start and/or end date of the Activity associated with a combo code. If the combo code is active but the project activity end date passed, the combo code will give you an error message when the transaction dates are outside the activity dates. This is because a combo code is specific to the Activity. If a project is active from 1/1/15 - 12/31/17, a combo code can be created for *each* of the project activity segments, e.g. Activity 1 = 1/1/15 - 12/31/15 = combo code 1234567891, Activity 2 = 1/1/16 - 12/31/16 = combo code 1425369685 and activity 3 = 1/1/17 - 12/31/17 = combo code 1236547898
- **All ChartFields Active for the Period** - Are all the ChartFields active for the period of time for the transaction?
- **Combo Code and Earnings Code** - Is the combination code valid for the REG earnings code? i.e. Is the ChartString that the combo code represents valid to use for a REG earnings code?
- **Combination Code does not exist** - Is this the first time the ChartString is used? Remember, combo codes are a representation of the ChartString. If a ChartString is needed for a transaction and a combo code has not been created for that ChartString, it must first be created. Refer to the "Request a New Combo Code" topic for detailed information and a simulation of the request

Job Effective Date (Hire Date) and Combo Code Edits

Profile Effective Date with Combination Code Edits

Remember - PAC will also run an edit to check that the Job Effective Date (Hire Date) is a valid date within the Activity Dates for the combo code entered.

After entering the Job Effective Date on the entry page of the template and then a Combination Code on page 2 of the template, the edit will run to confirm that the Job Effective Date is within the activity start and end dates established for the combo code entered. For example, if the activity dates for a combo code = 10/1/17 - 5/31/18 and the entered Job Effective Date entered = 9/16/17, PAC will return an error stating that the Effective Date must be within the Activity Dates for the Combo Code.

Funding End Date

Funding End Date

The Funding End Date is the end date on an employee's salary distribution profile which indicates the last day the employee's regular earnings should be charged to the specified combo code(s). A Funding End Date is required for all Salary Distributions. In some instances, the profile rolls over to the next fiscal year.

Let's explore the different ways a Funding End Date is used:

Salaried Employees not on a Grant with no Specific Funding End Dates

- For salaried employees not on a grant, and with no specific funding end date, enter the funding end date = to June 30 FY (e.g. 06/30/YYYY), unless you want to stop charging the ChartString(s) earlier. The funding will roll over to the next FY at the end of each fiscal year
- **Note:** If the employee has a salary increase/decrease, a new salary distribution profile does not need to be entered (on the Salary Distribution Page in PAC). Salary distributions are stored as a percentage and PAC will recalculate the amount charged to the ChartString(s) and apply that same percentage allocation. If the salary increase/decrease requires a change to the percent(s) or amount(s) charged to a ChartString a new profile must be created. We'll explore this shortly in the course

Salaried Employees not on a Grant with a Specific Funding End Date

- For salaried employees not on a grant but 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. E.g. Funding ends on 12/14/YYYY, a new profile must be set up effective 12/15/YYYY otherwise the salary charges will fall into the department suspense ChartString

Employees with Grant Funding

- For employees with grant funding, enter the actual funding end date. The funding will end on that date and a new profile must be entered. E.g. Funding ends on 12/14/YYYY, a new profile (in the Salary Distribution Page in PAC) must be set up effective 12/15/YYYY otherwise the salary charges will fall into the department suspense ChartString

Morningside Academic Personnel and Salary Distribution Rollovers

Salary Distribution Rollovers for Academic Personnel Reappointments at Morningside

When Morningside academic personnel are reappointed, the salary distribution previously in place will be evaluated and, whenever possible, will be rolled forward to the new appointment and will eliminate the need to enter new salary distributions for most reappointments. Academic personnel, such as Graduate Research Assistants, who are funded by sponsored projects will not have their salary distribution rolled forward.

When a reappointment is processed in PAC, the system will evaluate the prior funding for that person. If the prior salary distribution meets all of the criteria listed below, the prior salary distribution will be set up automatically for the period of the new appointment. If any of the below criteria are not met, then a new salary distribution will need to be set up in PAC by the administrative department.

Criteria:

- The ComboCode used in the prior salary distribution must be active for the current fiscal year
- The reappointment must be within one year from the last termination date. For example, if someone was last appointed 9/1/2017 - 12/31/2017 or 9/1/2017 - 5/31/2018, he or she can be reappointed and the funding can be rolled over whether s/he is reappointed for 9/1/2018 - 12/31/2018 or 9/1/2018 - 5/31/2019
- The salary funding must be allocated to non-sponsored projects only
- The reappointment is to the same Morningside department

When is a New Salary Distribution Required?

A new salary distribution will be required for reappointments if any of the following are true:

- The department wishes to change the funding source for the reappointment
- The ComboCode used in the prior salary distribution is no longer active
- The prior salary distribution included sponsored project accounts
- The reappointment is more than one year from the prior termination

Percent Distribution and Combo Code Amount

Percent Distribution and Combination Code Amount

The Percent (%) Distribution is the percentage of a payment (regular salary or add comp) being charged to a specified combo code. The combination code amount in salary distribution transactions is the *dollar amount of the salary* to be charged to the ChartString.

To assign the salary distribution for the hire/rehire, enter either the percent in the % (Percent) Distribution field or the dollar amount in the Combination Code Amount field. Enter either the Combo Code Amount (dollar amount) or a Percent of Distribution but not both. Once either a Percent or Combo Code Amount is entered, the other field is "grayed out" because you can only enter either the Combo Code Amount or the Percent of Distribution.

- A % Distribution is the *percentage amount of the payment* to be charged to the combo code
- A Combo Code Amount is the *dollar amount of the payment* to be charged to the combo code

To allocate the distribution to more than one ChartString, simply enter the additional allocation(s) in the remaining sections.

If a Combo Code Amount is entered, the system will calculate the percentage and store the percentage in PAC. Storing percentages in the system allows for automatic allocation of earnings when there is a change in earnings, e.g. salary increases or decreases. **The total salary distribution must equal 100%.**

You may enter up to four allocations as long as the total percentage amount equals 100% OR the total Combo Code Amount equals the employee's regular earnings entered on page 1 of the template. In the example below, the employee's \$60,000 regular earnings is split between two funding sources, one charged \$20,000 and the other charged \$40,000.

Employee Information	
Salary Distribution - 1a	
Combination Code	1000001342
Funding End Date	06/13/2016
Description	54410-UR004672-2
Combo Code Department	0109103 GOV Com
Combo Code Amount	
Percent of Distribution	33.330000
Salary Distribution - 1b	
Combination Code	1000001308
Funding End Date	06/13/2016
Description	53800-UR004672-2
Combo Code Department	2010103 PRV Com
Combo Code Amount	
Percent of Distribution	66.670000

Notice how PAC converts the dollar amounts into percentages. The total percentage charged equals 100%.

Enter a Salary Distribution Comment

Enter a Salary Distribution Comment in a Hire/Rehire Template

Comments are optional when creating new salary distribution profiles. In this section, you may provide a description of the distribution and indicate the nature and reason for the allocation, along with any specific details required by your own department or school. This information is viewable to the approvers and helpful for their review.

There is one comment area available at the bottom of the four salary distribution sections where you can enter notes about the salary distribution.

Personal / Job Data		Labor Accounting		*Job Eff Date (Hire Date): 10/11/2017	
Employee Information					
Salary Distribution - 1a					
Combination Code		1000003463	Funding End Date		06/30/2018
Description		53300-UR003343-25000-000000			
Combo Code Department		4024102 A&S Germanic Languag			
Combo Code Amount			Percent of Distribution		100.000000
Salary Distribution - 1b					
Combination Code			Funding End Date		
Description					
Combo Code Department					
Combo Code Amount			Percent of Distribution		
Salary Distribution Comments					
Comments					

\$0 Salary Appointments and TBH

\$0 Salary Appointments in TBH

\$0 salary appointments do not have regular earnings. However, when hiring a \$0 salary appointment in TBH, you must indicate a combo code and percent distribution on the hire/rehire template.

When completing the salary distribution section in TBH for \$0 salary appointments, enter or select the combo code and enter 100% in the percent of distribution field.

Note that for \$0 salary employees this is just a "placeholder". The employee has no regular earnings and therefore nothing will be charged to the combo code.

Casual Employee Hires and TBH

Casual Employee Hires in TBH

For casual employees, the combo code to charge a casual employee will typically be determined by the combination code entry in FFE when doing the time entry transaction. However, at the time of hire, a combo code must be identified to which a casual employee's earnings will be charged if no combination code is selected during the FFE time entry process.

Additional Compensation Section in TBH

Additional Compensation Section of the TBH Template

Below is a snapshot of what the additional compensation section of the page looks like. This section is not required to submit the hire/rehire transaction as not all employees receive additional pay at the time of hire. 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, will be applied to the Administrative templates. You will see additional sections in the Administrative templates until the update is made.

You determine the amount the employee receives per pay period and the length of time it is to be received by entering that information into the template.

Two things affect how much an employee receives:

- The Pay Period Amount of the additional compensation
- the Earnings End Date for the additional compensation

Note: The effective date for the employee's additional compensation is the Job Effective Date (Hire Date) that was entered when initially entering information into the template. There is not a separate "begin date" to enter in this section.

Let's explore each of these fields.

Additional Compensation - 1a	
Earnings Code <input type="text"/>	Earnings End Date <input type="text"/>
Description <input type="text"/>	Combination Code <input type="text"/>
Pay Period Amount <input type="text"/>	Description <input type="text"/>
	Combo Code Department <input type="text"/>
Additional Compensation - 1b	
Earnings Code <input type="text"/>	Earnings End Date <input type="text"/>
Description <input type="text"/>	Combination Code <input type="text"/>
Pay Period Amount <input type="text"/>	Description <input type="text"/>
	Combo Code Department <input type="text"/>
Comments - 1	
Comments	<input type="text"/>

Completing the Additional Compensation Section in TBH

Completing the Additional Compensation Section in TBH

Here is an example of a completed additional compensation section in TBH where a one-time bonus payment (BNS) was entered for the employee and the payment is charged 100% to a single combination code.

Note: The effective date for the employee's additional compensation is the Job Effective Date (Hire Date) that was entered when initially entering information into the template. There is not a separate "begin date" to enter in this section.

Let's explore each of these fields.

Additional Compensation - 1a	
Earnings Code <input type="text"/>	Earnings End Date <input type="text"/>
Description <input type="text"/>	Combination Code <input type="text"/>
Pay Period Amount <input type="text"/>	Description <input type="text"/>
	Combo Code Department <input type="text"/>

Additional Compensation - 1b	
Earnings Code <input type="text"/>	Earnings End Date <input type="text"/>
Description <input type="text"/>	Combination Code <input type="text"/>
Pay Period Amount <input type="text"/>	Description <input type="text"/>
	Combo Code Department <input type="text"/>

Comments - 1	
Comments	<input type="text"/>

Select an Earnings Code

Select an Earnings Code

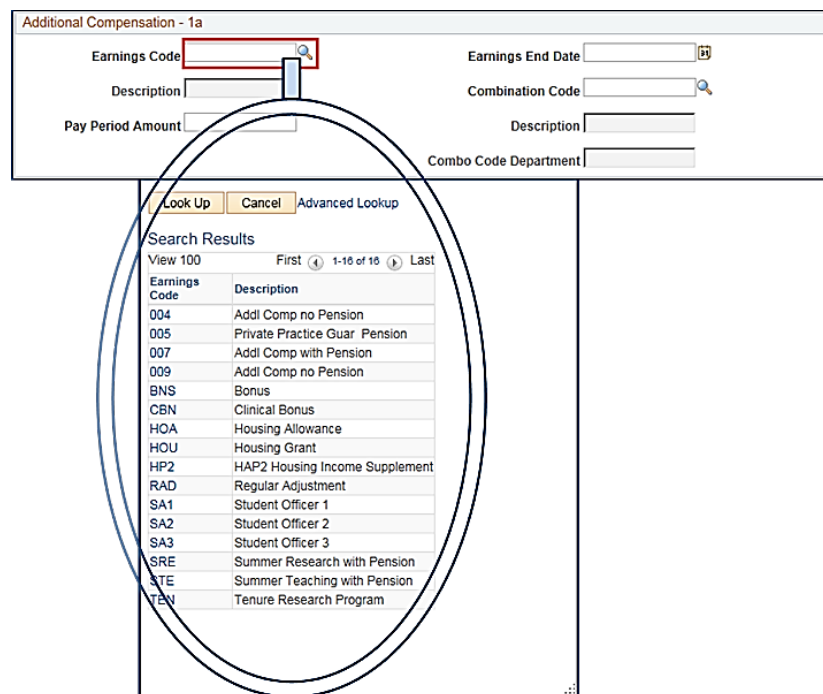
Remember - the earnings codes describe the type of add comp the employee is to receive. Refer to the "Earnings Code" topic for a refresher on earnings codes.

The code you enter/select is what sets this payment apart from others this employee may receive. You can enter the earnings code directly into the field, if you know it, or search for the code by clicking on the magnifying glass icon next to the earnings code field.

Rule: Only one add comp payment can be paid per earnings code per employee per paycheck. An employee can receive multiple add comps using different earnings codes, but only one payment per earnings code can be made to the employee per paycheck.

Key Points about Selecting Earnings Codes:

- Earnings codes are restricted to those appropriate for the employee to whom you are paying the add comp. When you click on the magnifying glass icon, a list of available earnings codes to choose from, specific to the employee, appear. For example, you cannot use a clinical earnings code for an admin employee at the Morningside campus. You can also enter the earnings code directly into the field
- Once an earnings code is entered/selected, PAC will run edits and if the earnings code passes validation, i. e. it is valid to use for the add comp payment for the employee, it is populated on the template and the description is displayed
- If the earnings code is not valid for the employee or dollar amount or timeframe, select the appropriate code



Additional Compensation - 1a

Earnings Code Earnings End Date

Description Combination Code

Pay Period Amount Description

Combo Code Department

Search Results

View 100 First 1-16 of 16 Last



Earnings Code	Description
004	Addl Comp no Pension
005	Private Practice Guar Pension
007	Addl Comp with Pension
009	Addl Comp no Pension
BNS	Bonus
CBN	Clinical Bonus
HOA	Housing Allowance
HOU	Housing Grant
HP2	HAP2 Housing Income Supplement
RAD	Regular Adjustment
SA1	Student Officer 1
SA2	Student Officer 2
SA3	Student Officer 3
SRE	Summer Research with Pension
STE	Summer Teaching with Pension
TEN	Tenure Research Program

Select an Earnings Code

Let's practice selecting an add comp earnings code within a template-based hire transaction. Remember - earnings codes are restricted to those appropriate for the employee to whom you are paying the add comp.

Procedure

This is the "Select an Earnings Code" topic where you will learn how to enter select an earnings code from the additional compensation section in page 2 of a hire/rehire template.

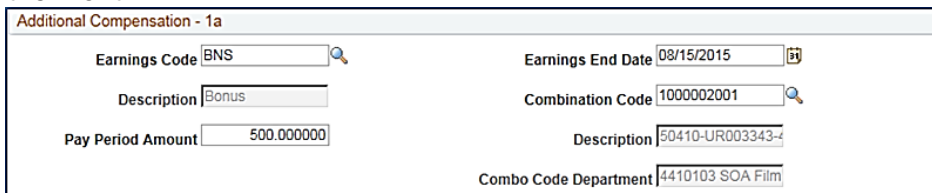
Step	Action
1.	This is page 1 of the hire template. After all of the information is input, click the Labor Accounting tab. 
2.	Click and drag the scrollbar down to go to the additional compensation section on the page.
3.	To search for an Earnings Code, click the Look up Earnings Code button next to the Earnings Code field.
4.	Select the Earnings Code from the Search Results list. For this example, click the BNS link. 
5.	Once the earnings code is selected from the Search Results, the code populates into the field on the template and the Description also displays.
6.	You have successfully completed the "Select an Earnings Code" topic. You can now move on to the next topic "Earnings End Date" where you will learn how to enter the earnings end date for an additional compensation payment in the hire/rehire template. End of Procedure.

Earnings End Date


Earnings End Date in the Additional Compensation Section in TBH


The earnings end date is required and indicates the last pay check the employee is to receive the add comp payment. In this example, assume the employee was hired on 8/6/YYYY and is to be paid a one-time bonus. Indicating an earnings end date = 8/15/YYYY tells PAC to pay the employee for one paycheck.

Note: An Earnings End Date must fall on the end of a pay period, i.e. the 15th or last day of the month.




Additional Compensation - 1a

Earnings Code: 

Earnings End Date: 

Description:

Combination Code: 

Pay Period Amount:

Description:

Combo Code Department:

Combination Codes

Combination Codes in Additional Compensation Payments





Recall that the combination code for additional compensation payments identifies the ChartFields to charge earnings in ARC. In the Combination Code field, enter the combo code to which you want to charge part or all of the add comp.

Once a combo code is entered or selected using the search feature, the description of that combo code appears in the "Combination Code Department" field. Note that the Combination Code Description, Combo Code Department Number and Name are displayed. See the topic "Search for a Combo Code" for a simulation on how to search for combo codes.

You can enter the combo code directly into the field, if you know it, or search for the code by clicking on the magnifying glass icon next to the combination code field and then entering at least three ChartFields in the search criteria. When using the search feature and after selecting the ChartField parameters, only those combo codes valid for the earnings code selected and employee type will appear. That is, PAC will not let you charge a combo code that is invalid for that earnings code.

Can I charge Add Comps to Foreign Department Combo Codes?

Yes, when entering add comps in template-based hire, you may charge your own combo codes or foreign department combo codes. If charging one or more foreign department combo codes, the transaction will route to all foreign funding department approvers after home department approval.

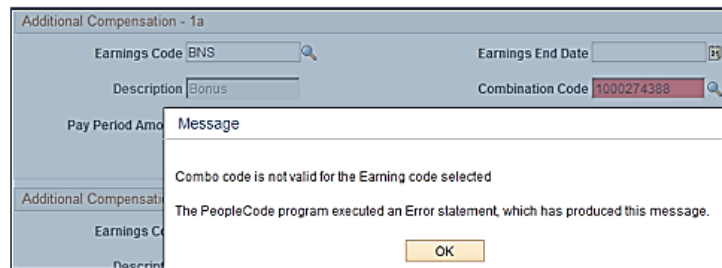
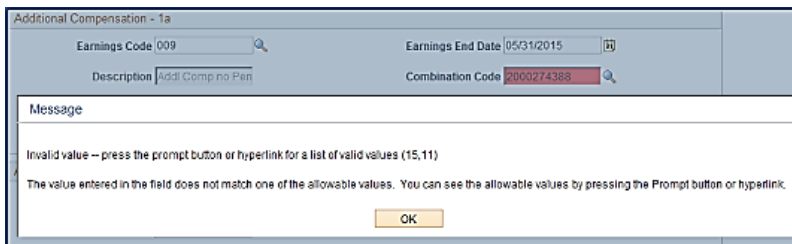
Additional Compensation - 1a	
Earnings Code	BNS 
Earnings End Date	02/28/2015 
Description	Bonus
Combination Code	1000274388 
Pay Period Amount	1000.000000
Description	50910-GT001867-1
Combo Code Department	TRAIN01 Training 

Combination Code Errors

Combination Code Errors

After entering the combo code in the field and then either pressing the *Enter* key or tabbing or clicking into another field, PAC will run edits to check the validity of the combo code.

There are many reasons why you may get an invalid combo code error. If the entered combination code is invalid or does not exist, you will not be able to save or proceed with the transaction. The entry field will turn red and PAC will generate a pop-up window with a message related to the error such as, "Invalid combination code value - - press the prompt button or hyperlink for a list of valid values." Or, "The combo code is not valid for the earnings code selected".



Let's look at a few of these and explore correcting the errors.

Correcting Combination Code Errors

Correcting Combination Code Errors

Here are some examples of combination code errors and reasons why they appear. Depending on the error, you may need to research the attributes with your department to resolve the error. Once you have the correct combo code, or the correct combo code is valid in PAC, you may enter the transaction.

- **Inactive Combo Code** - An inactive combo code is a "frozen" combo code that cannot be used for any transactions. Check if the combination code is inactive. For example, if a project is active from 1/1/15 - 12/31/17, the combo code(s) for that project will become inactive on 1/1/18
- **Project Activity Date Errors** - This occurs when the transaction dates fall outside of the start and/or end date of the Activity associated with a combo code. If the combo code is active but the project activity end date passed, the combo code will give you an error message when the transaction dates are outside the activity dates. This is because a combo code is specific to the Activity. If a project is active from 1/1/15 - 12/31/17, a combo code can be created for *each* of the project activity segments, e.g. Activity 1 = 1/1/15 - 12/31/15 = combo code 1234567891, Activity 2 = 1/1/16 - 12/31/16 = combo code 1425369685 and activity 3 = 1/1/17 - 12/31/17 = combo code 1236547898
- **All ChartFields Active for the Period** - Are all the ChartFields active for the period of time for the transaction?
- **Combo Code and Earnings Code** - Is the combination code valid for the earnings code used? i.e., Is the ChartString that the combo code represents valid to use for the earnings code selected?
- **Combination Code does not exist** - Is this the first time the ChartString is used? Remember, combo codes are a representation of the ChartString. If a ChartString is needed for a transaction and a combo code has not been created for that ChartString, it must first be created. Refer to the "Request a New Combo Code" topic for detailed information and a simulation of the request

Pay Period Amount

Pay Period Amount for an Add Comp in TBH

The Pay Period amount is the dollar amount paid to the employee each paycheck. To obtain the pay period amount, you must take the total amount of the add comp and divide it by the number of pay periods it is to be paid over and also by the number of combo codes that are funding the earnings code (if more than one).

In this example, the total \$500 payment is to be paid over one pay period, thus, the Pay Period Amount of \$500 is entered and the Earnings End Date entered is the pay check date equal to one pay period from the employee's date of hire.

Note: An Earnings End Date must fall on the end of a pay period, i.e. the 15th or last day of the month.

Additional Compensation - 1a	
Earnings Code	009
Earnings End Date	05/31/2015
Description	Add Comp no Pen
Combination Code	1000274388
Pay Period Amount	500.000000
Description	50910-GT001867-
Combo Code Department	TRAIN01 Training I

Pay Period Amounts and Paychecks

Pay Period Amounts and Paychecks

Let's explore this a bit more - - -

An add comp payment is entered and final approval received on 10/2/YYYY for the following transaction.

- Earnings code BNS for a total payment amount of \$1,000 for the timeframe 10/1/YYYY - 10/15/YYYY (one pay period from the Hire Date through the Earnings End Date). The Pay Period Amount = \$1,000, i.e. PAC will pay the employee a total of \$1,000 under earnings code BNS and the employee will receive the total amount (\$1,000) *in one paycheck*.

An add comp payment is entered and final approval received on 10/2/YYYY for the following transaction.

- Earnings code 009 for a total payment amount of \$1,000 for the timeframe 10/1/YYYY - 11/30/YYYY (four pay periods from the Hire Date through the Earnings End Date). The Pay Period Amount = \$250, i.e. PAC will pay the employee a total of \$1,000 under earnings code 009 and the employee will receive the total amount (\$1,000) *over four paychecks*, \$250 per paycheck.

Retroactive Payments and Paychecks

Let's look at that last example again changing the entry and final approval date to a date that is past the deadline for inclusion in the first paycheck timeframe.

An add comp payment is entered and final approval received on 10/20/YYYY for the following transaction.

- Earnings code 009 for a total payment amount of \$1,000 for the timeframe 10/1/YYYY - 11/30/YYYY (four pay periods from the hire date through the Earnings End Date. The Pay Period Amount still equals \$250 and the employee will still receive a total of \$1,000 under earnings code 009. However, as the Job Effective Date (Hire Date) is prior to the current date the past periods will be paid out on the first paycheck. For example, the employee will receive \$500 in the 10/31/YYYY paycheck and \$250 in each the 11/15/YYYY and 11/30/YYYY paychecks

Important! Always calculate the Pay Period Amount and check to verify that it is entered as intended.

Enter an Add Comp Comment

Enter an Add Comp Comment

A comment box is available at the bottom of each add comp payment section and is **required** for every add comp payment. Enter the description of the add comp along with any other information required by your department or school.

Enter in a description of the Add Comp in the "Comments" box for each add comp payment entered. Indicate the nature and reason for the add comp and include specific details required by your own department or school. For oversight and auditing reasons, it is required that you make every effort to make this information as specific as possible.

Comments - 1	
Comments	Training Example - - \$500 additional pay for work performed for lab set from 8/20 - 8/31. Add

Template-Based Hire Labor Accounting Transaction Examples

Template-Based Hire Labor Accounting Transaction Examples

Following are sample template-based hire labor accounting transactions.

TBH Salary Distribution with Single Funding Source by Percentage

Let's practice entering the salary distribution profile for an administrative officer by percentage. In this example, the employee's earnings are charged 100% to a single non-grant funding source.

Procedure

This is the "TBH Salary Distribution with Single Funding Source by Percentage" topic where you will learn how to enter a salary distribution for a new hire whose regular earnings are charged 100% to a single combo code.




Step	Action
1.	This is page 1 of the hire template. After all of the information is input, click the Labor Accounting tab.
2.	Now we are at the top of page 2 in the template where the salary distribution is entered. The first field to enter into is the Combination Code field. In this example the combination code is entered. For a demonstration on how to search for a combo code, reference the "Search for a Combo Code" topic. For this example, enter 1000001020 .
3.	Click in the Funding End Date field.
4.	The Combination Code populates into the field. The Description for the Combo Code is displayed as well as the Combo Code Department Number and Name.
5.	Now let's indicate when this funding arrangement ends. This is an employee who is funded by a non-grant account with no specific end date. Enter, " 06/30/2016 " into the Funding End Date field. By entering the last day of the fiscal year, PAC will rollover this funding arrangement into the next fiscal year.
6.	Now let's click in the Percent of Distribution field to enter a percentage.
7.	Enter the information into the Percent of Distribution field. For this example enter " 100 ".
8.	Press [Enter] .
9.	The required salary distribution is complete for this employee. If there are no additional compensation payments (known at the time of hire) to enter, the template can be submitted into workflow for review.
10.	You have successfully completed "TBH Salary Distribution with Single Funding Source by Percentage" topic. You can now move on to the next topic "TBH Salary Distribution with Single Funding Source by Combo Code Amount" where you will learn how to enter a salary distribution charged to a single combo code by combo code amount (dollar amount). End of Procedure.

TBH Salary Distribution with Single Funding Source by Combination Code Amount

Let's practice entering the salary distribution profile for an administrative officer by combination code amount (dollar amount). In this example, the employee's earnings are charged to a single non-grant funding source and the entire regular earnings dollar amount is entered.

Procedure

This is the "TBH Salary Distribution with Single Funding Source by Combo Code Amount" where you will learn how to enter a salary distribution charged to a single combo code by combo code amount (dollar amount).

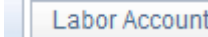


Step	Action
1.	This is page 1 of the hire template. After all of the information is input, click the Labor Accounting tab. 
2.	Now we are at the top of page 2 in the template where the salary distribution is entered. The first field to enter into is the Combination Code field. In this example the combination code is entered. For a demonstration on how to search for a combo code, reference the "Search for a Combo Code" topic. For this example, enter 1000001020 .
3.	Click in the Funding End Date field. 
4.	Now let's indicate when this funding arrangement ends. This is an employee who is funded by a non-grant account. Enter " 06/30/2016 " into the Funding End Date field. By entering the last day of the fiscal year, PAC will rollover this funding arrangement into the next fiscal year.
5.	Now let's click in the Combo Code Amount field to enter a dollar amount. 
6.	Enter the information into the Combo Code Amount field. For this example enter " 65000 ".
7.	Note that the dollar amount is converted to a percentage. In this example it is equal to 100% of the employee's salary. Press [Enter] .
8.	You have successfully completed the "TBH Salary Distribution with Single Funding Source by Combination Code Amount" topic. You can now move on to the next topic "TBH Salary Distribution Charging Multiple Combination Codes by Percentage" where you will learn how to allocate regular earnings to more than one combination code. End of Procedure.

TBH Salary Distribution Charging Multiple Combination Codes by Percentage

Let's practice entering the salary distribution profile for an administrative officer to multiple combination codes by percentage. In this example, the employee's earnings are charged 70% to the home department and 30% to another department where the employee is working on a project.

Procedure

This is the "TBH Salary Distribution Charging Multiple Combination Codes by Percentage" topic where you will learn how to enter a salary distribution for a new hire whose regular earnings are charged to multiple combo codes by percentage.

Step	Action
1.	This is page 1 of the hire template. After all of the information is input, click the Labor Accounting tab. 
2.	Now we are at the top of page 2 in the template where the salary distribution is entered. The first field to enter into is the Combination Code field. In this example the combination code is entered. For a demonstration on how to search for a combo code, reference the "Search for a Combo Code" topic. For this example, enter 100001020 .
3.	Now let's indicate when this funding arrangement ends. This is an employee who is funded by a non-grant account with no specific funding end date. Enter " 06/30/2016 " into the Funding End Date field. By entering the last day of the fiscal year, PAC will rollover this funding arrangement into the next fiscal year.
4.	Next let's indicate the percentage amount to charge to the combo code indicated for the employee's regular earnings. Click in the Percent of Distribution field. 
5.	Enter the percentage amount to charge to the combo code. For this example enter " 70 ".
6.	Now let's enter the remaining 30% allocation for the salary distribution. Click in the Combination Code field. 
7.	Enter the combination code into the Combination Code field. For this example enter " 1000274445 ".

Step	Action
8.	<p>Next, indicate when the funding ends for the charge.</p> <p>Click in the Funding End Date field.</p> <div style="border: 1px solid black; width: 100px; height: 15px; margin-left: 20px;"></div>
9.	Enter the date into the Funding End Date field. For this example " 6/30/2016 ".
10.	<p>Next, click in the Percent of Distribution field.</p> <div style="border: 1px solid black; width: 100px; height: 15px; margin-left: 20px;"></div>
11.	<p>Enter the percentage amount into the Percent of Distribution field. Enter "30". We are entering 30% because 70% was charged to the other combo code and the employee's regular earnings are to be allocated by these percentage amounts to these respective combo codes.</p> <p>Remember, salary distributions must equal 100%.</p>
12.	<p>The required salary distribution is complete for this employee. The regular earnings are charged 100% to two combo codes.</p> <p>If there are no additional compensation payments (known at the time of hire) to enter, the template can be submitted into workflow for review.</p>
13.	<p>You have successfully completed the "TBH Salary Distribution Charging Multiple Combination Codes by Percentage" topic. You can now move on to the "TBH Salary Distribution Charging Multiple Combination Codes by Combo Code Amount" where you will learn how to enter a salary distribution for a new hire whose regular earnings are charged to multiple combo codes by dollar amount.</p> <p>End of Procedure.</p>

Training Guide

Template-Based Hires and Labor Accounting







TBH Single Add Comp Payment Charged to One Combo Code

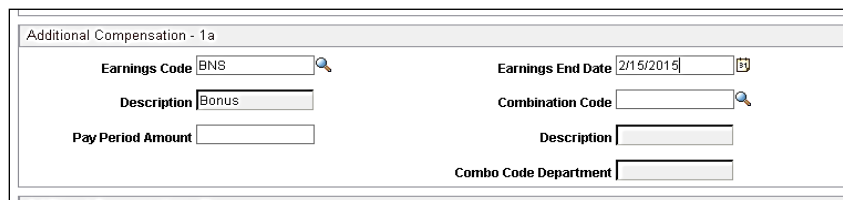
Let's practice entering an additional compensation for an administrative officer to a single combination code. In this example, the employee will receive a bonus payment equal to \$1,000.00.

Procedure

This is the "TBH Single Add Comp Payment Charged to One Combination Code" topic where you will learn how to enter a single add comp payment charged to one combo code.

Step	Action
1.	This is page 1 of the hire template. After all of the information is input, click the Labor Accounting tab. 
2.	Now we are at the top of page 2 in the template where the salary distribution and additional compensation payment is entered. In this example, the salary distribution is entered. Click and drag the scrollbar to move down to the additional compensation section. There are six add comp sections to allow for six separate payments to be entered at the time of hire. Begin entering in section 1.
3.	First, select the earnings code for the payment. Click the Look up Earnings Code button next to the Earnings Code field. 
4.	Select the Earnings Code from the Search Results list that appears. Remember, the earnings code describes the type of payment. For this example the employee is receiving a bonus payment. Click the BNS link. 
5.	Next, enter the end date for the add comp, i.e. the last day it is to be paid. Click in the Earnings End Date field. 

Step	Action
6.	<p>This is a one-time bonus payment. The employee is to receive the bonus payment in one paycheck.</p> <p>The payment is for a \$1,000 bonus payment paid over one pay period. Since the employee's hire date is 2/1/2015 that is when the payment begins. To end the payment after one pay period, the end date for the payment is 2/15/2015.</p> <p>Enter "2/15/2015" into the Earnings End Date field.</p>



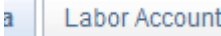
Step	Action
7.	<p>Next, enter the combination code to charge the add comp to.</p> <p>For this example, enter 100001011 in the Combination Code field.</p>
8.	<p>When you click or tab into another field, or press "Enter", the Combination Code populates into the field. The Description for the Combo Code is displayed as well as the Combo Code Department Number and Name.</p>
9.	<p>Now let's enter the dollar amount of the add comp payment the employee is to receive each pay period.</p> <p>Click in the Pay Period Amount field.</p> <div style="border: 1px solid black; width: 100px; height: 20px; margin-left: 20px;"></div>
10.	<p>Enter the per pay period dollar amount of the add comp into the Pay Period Amount field.</p> <p>The payment is for a \$1,000 bonus payment paid over one pay period. We already established the end date for the payment equal to one pay period.</p> <p>Enter "1000".</p>
11.	<p>Press [Enter].</p>
12.	<p>A comment is required for every add comp example. The comments field is at the end of each add comp payment section.</p>
13.	<p>The add comp payment is complete. The template can be submitted into workflow for review.</p>
14.	<p>You have successfully completed the "TBH Single Add Comp Payment Charged to One Combination Code" topic. You can now move on to the "TBH Single Add Comp Payment Charged to Multiple Combination Codes" where you will learn how to enter a single add comp payment charging more than one combination code.</p> <p>End of Procedure.</p>

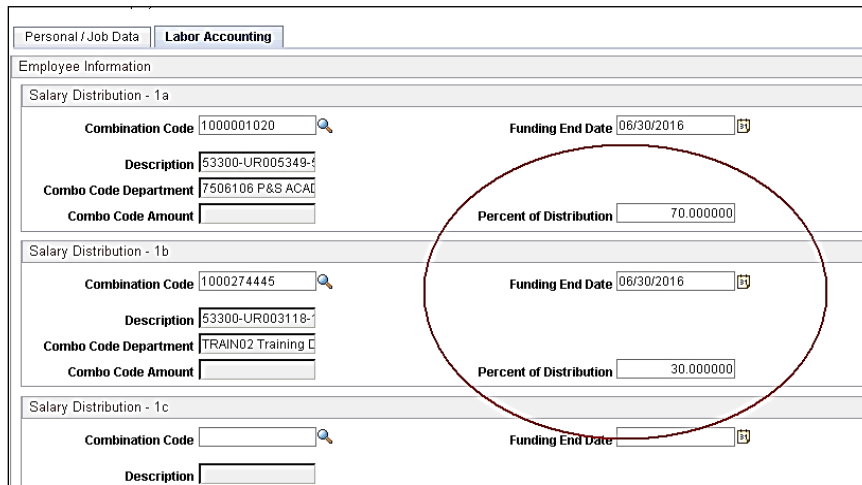
TBH Single Add Comp Charged to Multiple Combo Codes

Let's practice entering an additional compensation for an administrative officer to multiple combination codes. In this example, the employee will receive a bonus payment equal to \$1,000.00 charged equally to two combo codes.

Procedure


This is the "TBH Single Add Comp Charged to Multiple Combination Codes" topic where you will learn how to enter an add comp payment and charge that payment to more than one combination code.

Step	Action
1.	This is page 1 of the hire template. After all of the information is input, click the Labor Accounting tab. 
2.	Now we are at the top of page 2 in the template where the salary distribution and additional compensation payment is entered. In this example, the salary distribution is entered charging the regular earnings to two combo codes, one charged 70% and the other 30%. The \$1,000 additional compensation payments will be allocated to the same two combo codes using the same percentage amounts to arrive at the dollar amount.



The screenshot shows the 'Labor Accounting' tab in a software interface. It displays three sections for salary distribution: 'Salary Distribution - 1a', 'Salary Distribution - 1b', and 'Salary Distribution - 1c'. Each section has fields for 'Combination Code', 'Description', 'Combo Code Department', 'Combo Code Amount', and 'Funding End Date'. A red circle highlights the 'Percent of Distribution' fields for sections 1a and 1b, which are set to 70.000000 and 30.000000 respectively.

Step	Action
3.	Click and drag the scrollbar to move down to the additional compensation section. There are six add comp sections to allow for six separate payments to be entered at the time of hire. Begin entering in section 1a.

Step	Action
4.	<p>First, select the earnings code for the payment.</p> <p>Click the Look up Earnings Code button next to the Earnings Code field.</p> 
5.	<p>Select the Earnings Code from the Search Results list that appears. Remember, the earnings code defines the type of payment.</p> <p>For this example the employee is receiving a bonus payment.</p> <p>Click the BNS link.</p> <p><u>BNS</u></p>
6.	<p>Next, enter the end date for the add comp, i.e. the last day it is to be paid.</p> <p>Click in the Earnings End Date field.</p> <input style="width: 100px; height: 20px;" type="text"/>
7.	<p>This is a one-time bonus payment. The employee is to receive the bonus payment in one paycheck.</p> <p>The payment is for a \$1,000 bonus payment paid over one pay period. Since the employee's hire date is 2/8/2015 that is when the payment begins. To end the payment after one pay period, the end date for the payment is 2/15/2015.</p> <p>Enter "2/15/2015" into the Earnings End Date field.</p>
8.	<p>Next, enter the combination code to charge the add comp to.</p> <p>Click in the Combination Code field.</p> <input style="width: 100px; height: 20px;" type="text"/>
9.	<p>In this section, we will enter the first combo code that is being charged 70% of the add comp payment.</p> <p>Enter "100001020" into the Combination Code field. This is the same combo code that is being charged 70% of the regular earnings.</p>
10.	<p>Now let's enter the dollar amount of the add comp payment the employee is to receive each pay period per combo code.</p> <p>Click in the Pay Period Amount field.</p>

Step	Action
11.	<p>Enter the per pay period dollar amount of the add comp that is being charged to this combo code into the Pay Period Amount field.</p> <p>The payment is for a \$1,000 bonus payment of which 70% is charged to this combo code. 70% of \$1,000 equals \$700. Thus enter 700.</p> <p>Enter "700".</p>
12.	Press [Enter] .
13.	<p>Now let's enter the rest of the add comp payment charging the remaining portion to the other combo code.</p> <p>As this is part of the same add comp, enter the next segment of the allocation in section 1b. The first allocation was entered in section 1a.</p> <p>Click in the Earnings Code field.</p>
14.	Click the Look up Earnings Code button to select the earnings code for the payment.
15.	<p>Here, select the same code used in section 1a as it is the same type of payment, bonus.</p> <p>Click the BNS link.</p> <p>BNS</p>
16.	Now let's indicate the Earnings End Date. The earnings end date must be the same for each allocation within a particular earnings code. Click in the Earnings End Date field.
17.	Enter " 2/15/2015 " into the Earnings End Date field.
18.	<p>Next, enter the second combo code that is being charged 30% of the add comp payment.</p> <p>Enter "1000274445" into the Combination Code field. This is the same combo code that is being charged 30% of the regular earnings.</p>
19.	<p>Enter the per pay period dollar amount of the add comp that is being charged to this combo code into the Pay Period Amount field.</p> <p>The payment is for a \$1,000 bonus payment of which 30% is charged to this combo code. 30% of \$1,000 equals \$300. Thus enter 300.</p> <p>Enter "300".</p>
20.	Press [Enter] .
21.	A comment is required for every add comp example. The comments field is at the end of each add comp payment section.
22.	The add comp payment is entered. The employee will receive a \$1,000 add comp payment and the combo codes will be charged \$700 and \$300 as indicated.
23.	<p>You have successfully completed the "TBH Single Add Comp Charged to Multiple Combo Codes" topic. You can now move on to the "TBH Multiple Add Comp Payments" where you will learn how to enter multiple add comp payments in the hire/rehire template.</p> <p>End of Procedure.</p>


TBH Multiple Add Comp Payments

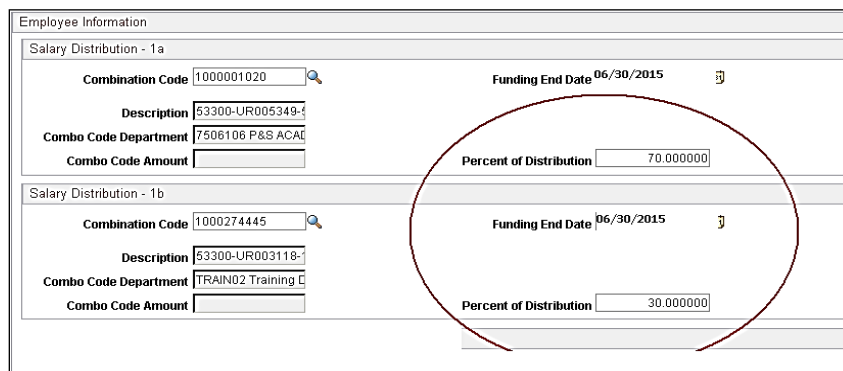
Let's practice entering multiple additional compensation payments for an academic officer. In this example, the employee will receive additional pay equal to:

- 004 = \$4,500
- 005 = \$9,000
- Housing Grant = \$18,000

Procedure

This is the "TBH Multiple Add Comp Payments" topic where you will learn how to enter multiple add comp payments within a hire/rehire template.

Step	Action
1.	This is page 1 of the hire template. After all of the information is input, click the Labor Accounting tab. 
2.	Now we are at the top of page 2 in the template where the salary distribution and additional compensation payment is entered. In this example, the salary distribution is entered.




Step	Action
3.	Click and drag the scrollbar to move down to the additional compensation section. There are three add comp sections to allow for three separate payments to be entered at the time of hire. Begin entering in section 1a.
4.	First, select the earnings code for the payment. Click the Look up Earnings Code button next to the Earnings Code field.

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Step	Action
5.	<p>Select the Earnings Code from the Search Results list that appears. Remember, the earnings code describes the type of payment.</p> <p>For this example the employee is receiving a \$4,500 add comp using earnings code 004.</p> <p>Click the 004 link.</p> <p>004</p>
6.	<p>Next, enter the end date for the add comp, i.e. the last day it is to be paid.</p> <p>Click in the Earnings End Date field.</p> <p>_____</p>
7.	<p>This is a payment received over the course of the fiscal year. The employee is to receive the \$4,500 payment over all paychecks from the hire date (7/1/20YY) through the end of the fiscal year (6/30/20YY).</p> <p>The payments begin as of the hire date entered in the template. To end the payments at the end of the fiscal year, the end date is 6/30/2015.</p> <p>For this example, enter "6/30/2015" into the Earnings End Date field.</p>
8.	<p>Next, enter the combination code to charge the add comp to.</p> <p>Click in the Combination Code field.</p>
9.	<p>For this example, we will charge all of the add comp payments to a single combo code which we obtained prior and we have the number to enter.</p> <p>Enter "100274470" into the Combination Code field.</p>
10.	<p>Now let's enter the dollar amount of the add comp payment the employee is to receive each pay period per combo code.</p> <p>Click in the Pay Period Amount field.</p>


Step	Action
11.	<p>Enter the per pay period dollar amount of the add comp that is being charged to this combo code into the Pay Period Amount field.</p> <p>To do this, take the total payment of \$4,500 and divide it by the number of pay periods in the timeframe from the hire date through the Earnings End Date which equals \$187.50.</p> <p>Hire Date = 7/1/2014 Earnings End Date = 6/30/2015 # of months = 12 # of paychecks = 24 \$4,500/24 = \$187.50</p> <p>Enter "187.50".</p>
12.	Press [Enter] .
13.	<p>To recap what is entered in this section. The employee is to receive \$187.50 per pay period for the 004 add comp beginning on the hire date and ending on 6/30/2015 for a total of \$4,500.</p> <p>PAC also calculates retroactive payments due. For example, if the template is submitted and in PAC after the deadline for the 7/15/2014 paycheck, the employee will receive any retroactive payments due.</p>
14.	A comment is required for every add comp example. The comments field is at the end of each add comp payment section.
15.	<p>Click and drag the scrollbar to move down to the next additional compensation section - #2.</p> <p>Remember, each add comp can be allocated to four combo codes and each payment has four entry sections, a - d. Be sure to move to the next add comp section when entering a new add comp payment.</p>
16.	<p>Begin entering the second add comp in section 2a.</p> <p>First, select the earnings code for the payment.</p> <p>Click the Look up Earnings Code button next to the Earnings Code field.</p> 
17.	<p>Select the Earnings Code from the Search Results list that appears. Remember, the earnings code describes the type of payment.</p> <p>For this example the employee is receiving a \$9,000 add comp using earnings code 005.</p> <p>Click the 005 link.</p> <p>005</p>

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Step	Action
18.	<p>Next, enter the end date for the add comp, i.e. the last day it is to be paid.</p> <p>Click in the Earnings End Date field.</p>
19.	<p>This is a payment received over the course of the fiscal year. The employee is to receive the \$9,000 payment over all paychecks from the hire date (7/1/20YY) through the end of the fiscal year (6/30/20YY).</p> <p>The payments begin as of the hire date entered in the template. To end the payments at the end of the fiscal year, the end date is 6/30/20YY.</p> <p>For this example, enter "6/30/2015" into the Earnings End Date field.</p>
20.	<p>Next, enter the combination code to charge the add comp to.</p> <p>Click in the Combination Code field.</p>
21.	<p>For this example, we will charge all of the add comp payments to a single combo code which we obtained prior and we have the number to enter.</p> <p>Enter "1000274469" into the Combination Code field.</p>
22.	<p>Now let's enter the dollar amount of the add comp payment the employee is to receive each pay period.</p> <p>Click in the Pay Period Amount field.</p>
23.	<p>Enter the per pay period dollar amount of the add comp into the Pay Period Amount field.</p> <p>To do this, take the total payment of \$9,000 and divide it by the number of pay periods in the timeframe from the hire date through the Earnings End Date which equals \$375.</p> <p>Hire Date = 7/1/20YY Earnings End Date = 6/30/20YY # of months = 12 # of paychecks = 24 \$9,000/24 = \$375</p> <p>Enter "375".</p>
24.	<p>Press [Enter].</p>

Step	Action
25.	<p>To recap what is entered in this section. The employee is to receive \$375 per pay period for the 005 add comp beginning on the hire date and ending on 6/30/20YY for a total of \$9,000.</p> <p>Remember, PAC also calculates and retroactive payments due.</p>
26.	<p>A comment is required for every add comp example. The comments field is at the end of each add comp payment section.</p>
27.	<p>Let's enter the next add comp payment.</p> <p>Click and drag the scrollbar to move down to the next additional compensation section - #3.</p> <p>Remember, each add comp can be allocated to four combo codes and each payment has four entry sections, a - d. Be sure to move to the next add comp section when entering a new add comp payment.</p>
28.	<p>Begin entering the third add comp in section 3a.</p> <p>First, select the earnings code for the payment.</p> <p>Click the Look up Earnings Code button next to the Earnings Code field.</p> 
29.	<p>Select the Earnings Code from the Search Results list that appears. Remember, the earnings code describes the type of payment.</p> <p>For this example the employee is receiving a \$18,000 add comp using earnings code HOA.</p> <p>Click the HOA link.</p> <p>HOA</p>
30.	<p>Next, enter the end date for the add comp, i.e. the last day it is to be paid.</p> <p>Click in the Earnings End Date field.</p>
31.	<p>This is a payment received over the course of the fiscal year. The employee is to receive the \$18,000 payment over all paychecks from the hire date (7/1/20YY) through the end of the fiscal year (6/30/20YY).</p> <p>The payments begin as of the hire date entered in the template. To end the payments at the end of the fiscal year, the end date is 6/30/20YY.</p> <p>For this example, enter "6/30/2015" into the Earnings End Date field.</p>

Step	Action
32.	<p>Next, enter the combination code to charge the add comp to.</p> <p>Click in the Combination Code field.</p> <p>_____</p>
33.	<p>For this example, we will charge all of the add comp payments to a single combo code which we obtained prior and we have the number to enter.</p> <p>Enter "1000274470" into the Combination Code field.</p>
34.	<p>Now let's enter the dollar amount of the add comp payment the employee is to receive each pay period.</p> <p>Click in the Pay Period Amount field.</p>
35.	<p>Enter the per pay period dollar amount of the add comp into the Pay Period Amount field.</p> <p>To do this, take the total payment of \$18,000 and divide it by the number of pay periods in the timeframe from the hire date through the Earnings End Date which equals \$750.</p> <p>Hire Date = 7/1/20YY Earnings End Date = 6/30/20YY # of months = 12 # of paychecks = 24 \$9,000/18 = \$750</p> <p>Enter "750".</p>
36.	<p>Press [Enter].</p>
37.	<p>To recap what is entered in this section. The employee is to receive \$750 per pay period for the HOA add comp beginning on the hire date and ending on 6/30/20YY for a total of \$18,000.</p> <p>Remember, PAC also calculates and retroactive payments due.</p>
38.	<p>A comment is required for every add comp example. The comments field is at the end of each add comp payment section.</p>
39.	<p>The add comp payment is complete. The template can be submitted into workflow for review.</p>
40.	<p>You have successfully completed the "TBH Multiple Add Comp Payments" topic. You can now move on to the "TBH Multiple Add Comp Payments Charging Multiple Combination Codes" where you will learn how to enter multiple add comp payments in the hire/rehire template charging multiple combination codes.</p> <p>End of Procedure.</p>

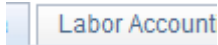
TBH Multiple Add Comp Payments Charging Multiple Combo Codes

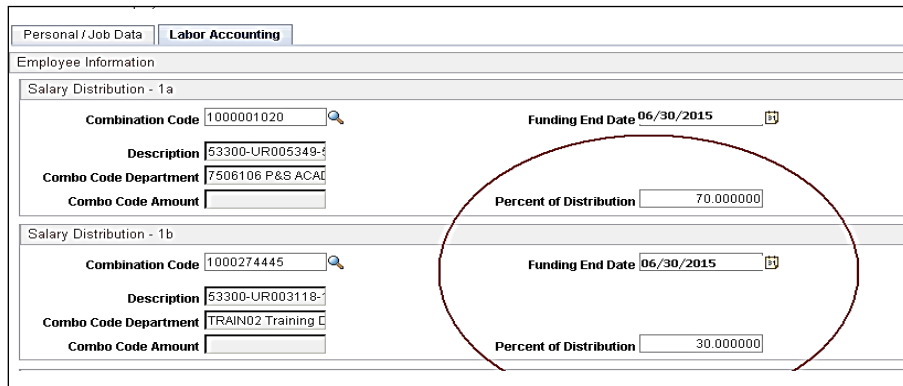
Let's practice entering multiple additional compensation payments for an academic officer charged to multiple combo codes. In this example, the employee will receive additional pay equal to:

- 004 = \$4,500
- 005 = \$9,000
- Housing Grant = \$18,000

Procedure

This is the "TBH Multiple Add Comp Payments Charging Multiple Combo Codes" topic where you will learn how to enter multiple add comp payments within a hire/rehire template charging more than one combination code.

Step	Action
1.	This is page 1 of the hire template. After all of the information is input, click the Labor Accounting tab. 
2.	Now we are at the top of page 2 in the template where the salary distribution and additional compensation payment is entered. In this example, the salary distribution is entered.



Step	Action
3.	Click and drag the scrollbar to move down to the additional compensation section. There are six add comp sections to allow for six separate payments to be entered at the time of hire. Begin entering in section 1a.

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Step	Action
4.	<p>First, select the earnings code for the payment.</p> <p>Click the Look up Earnings Code button next to the Earnings Code field.</p>
5.	<p>Select the Earnings Code from the Search Results list that appears. Remember, the earnings code describes the type of payment.</p> <p>For this example the employee is receiving a \$4,500 add comp using earnings code 004.</p> <p>Click the 004 link.</p> <p>004</p>
6.	<p>Next, enter the end date for the add comp, i.e. the last day it is to be paid.</p> <p>Click in the Earnings End Date field.</p>
7.	<p>This is a payment received over the course of the fiscal year. The employee is to receive the \$4,500 payment over all paychecks from the hire date (7/1/20YY) through the end of the fiscal year (6/30/20YY).</p> <p>The payments begin as of the hire date entered in the template. To end the payments at the end of the fiscal year, the end date is 6/30/2015.</p> <p>For this example, enter "6/30/2015" into the Earnings End Date field.</p>
8.	<p>Next, enter the combination code to charge the add comp to.</p> <p>Click in the Combination Code field.</p>
9.	<p>For this example, we will charge 50% of all the add comp payments to one combo code and 50% to a different combo code which we obtained prior and we have the number to enter. Note: Combo codes used are for training simulation only.</p> <p>Enter "1000274470" into the Combination Code field.</p>
10.	<p>Now let's enter the dollar amount of the add comp payment the employee is to receive each pay period per combo code.</p> <p>Click in the Pay Period Amount field.</p>

Step	Action
11.	<p>Enter the per pay period dollar amount of the add comp that is being charged to this combo code into the Pay Period Amount field.</p> <p>To do this, take the total payment of \$4,500 and divide it by the number of pay periods in the timeframe from the hire date through the Earnings End Date which equals \$187.50.</p> <p>However, when charging a payment to multiple combo codes, determine the amount to be charged to each combo code and enter that dollar amount in the field.</p> <p>In this example, the charges for this payment are divided between two combo codes. Let's say each combo code is to be charged equally for the payment. Thus, \$93.75 each.</p> <p>Hire Date = 7/1/20YY Earnings End Date = 6/30/20YY # of months = 12 # of paychecks = 24 4,500/24 = \$187.50 \$187.50/2 = \$93.75</p> <p>Enter "93.75".</p>
12.	Press [Enter] .
13.	<p>Now let's enter the other allocation for the payment into section 1b.</p> <p>We are entering this in section 1b because it is an allocation of the same payment, payment #1.</p> <p>Click in the Earnings Code field.</p>
14.	<p>Enter "004" into the Earnings Code field.</p> <p>The Earnings Code must be the same for each allocation within a particular earnings code.</p>
15.	Click in the Earnings End Date field.
16.	Enter " 06/30/2015 " into the Earnings End Date field.
17.	Click in the Combination Code field.
18.	Enter " 1000289851 " into the Combination Code field.
19.	Enter " 93.75 " into the Pay Period Amount field.
20.	Press [Enter] .
21.	A comment is required for every add comp example. The comments field is at the end of each add comp payment section.

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Template-Based Hires and Labor Accounting




Step	Action
22.	<p>The charge to multiple combo codes for add comp payment #1 is complete.</p> <p>The employee will receive \$187.50 per pay period for this add comp and the combo codes will each be charged \$93.75 for the payment.</p>
23.	<p>To recap what is entered in this section. The employee is to receive \$187.50 per pay period for the 004 add comp beginning on the hire date and ending on 6/30/2015 for a total of \$4,500.</p> <p>Each combo code will be charged \$93.75 for the payment as indicated in the entries.</p> <p>PAC also calculates retroactive payments due. For example, if the template is submitted and in PAC after the deadline for the 7/15/2014 paycheck, the employee will receive any retroactive payments due.</p>
24.	<p>Click and drag the scrollbar to move down to the next additional compensation section - #2.</p> <p>Remember, each add comp can be allocated to four combo codes and each payment has four entry sections, a - d. Be sure to move to the next add comp section when entering a new add comp payment.</p>
25.	<p>Begin entering the second add comp in section 2a.</p> <p>First, select the earnings code for the payment.</p> <p>Click the Look up Earnings Code button next to the Earnings Code field.</p>
26.	<p>Select the Earnings Code from the Search Results list that appears. Remember, the earnings code describes the type of payment.</p> <p>For this example the employee is receiving a \$9,000 add comp using earnings code 005.</p> <p>Click the 005 link.</p> <p>005</p>
27.	<p>Next, enter the end date for the add comp, i.e. the last day it is to be paid.</p> <p>Click in the Earnings End Date field.</p> <p> </p>
28.	<p>This is a payment received over the course of the fiscal year. The employee is to receive the \$9,000 payment over all paychecks from the hire date (7/1/20YY) through the end of the fiscal year (6/30/20YY).</p> <p>The payments begin as of the hire date entered in the template. To end the payments at the end of the fiscal year, the end date is 6/30/20YY.</p> <p>For this example, enter "06/30/2015" into the Earnings End Date field.</p>

Step	Action
29.	<p>Next, enter the combination code to charge the add comp to.</p> <p>Click in the Combination Code field.</p> <p>in Code </p>
30.	<p>For this example, we will charge 50% of this add comp payment to a combo code and 50% to another combo code which we obtained prior and have the number to enter. Note: Combo codes used are for training simulation only.</p> <p>Enter "1000290466" into the Combination Code field for the first allocation.</p>
31.	<p>Now let's enter the dollar amount of the add comp payment the employee is to receive each pay period.</p> <p>Click in the Pay Period Amount field.</p> <p>t </p>
32.	<p>Enter the per pay period dollar amount of the add comp into the Pay Period Amount field.</p> <p>To do this, take the total payment of \$9,000 and divide it by the number of pay periods in the timeframe from the hire date through the Earnings End Date which equals \$375.</p> <p>Hire Date = 7/1/20YY Earnings End Date = 6/30/20YY # of months = 12 # of paychecks = 24 \$9,000/24 = \$375 \$375/2 = \$187.50 Enter "187.50"</p>
33.	<p>Press [Enter].</p>
34.	<p>Now let's enter the other allocation for the payment into section 2b.</p> <p>We are entering this in section 2b because it is an allocation of the same payment, payment #2.</p> <p>Press [Enter].</p>
35.	<p>Click in the Earnings Code field.</p> <p>de </p>
36.	<p>The Earnings Code must be the same for each allocation within a particular earnings code.</p> <p>Enter "005" into the Earnings Code field.</p>

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Template-Based Hires and Labor Accounting



Step	Action
37.	Click in the Earnings End Date field. arnings End Date
38.	Enter " 06/30/2015 " into the Earnings End Date field.
39.	Click in the Combination Code field. Combination Code
40.	Enter " 1000290504 " into the Combination Code field.
41.	Enter " 187.50 " into the Pay Period Amount field.
42.	Press [Enter] .
43.	A comment is required for every add comp example. The comments field is at the end of each add comp payment section.
44.	To recap what is entered in this section. The employee is to receive \$375 per pay period for the 005 add comp charging \$187.50 to each combo code as indicated beginning on the hire date and ending on 6/30/2015 for a total of \$9,000. Remember, PAC also calculates any retroactive payments due.
45.	Let's enter the next add comp payment. Click and drag the scrollbar to move down to the next additional compensation section - #3. Remember, each add comp can be allocated to four combo codes and each payment has four entry sections, a - d. Be sure to move to the next add comp section when entering a new add comp payment.
46.	Begin entering the third add comp in section 3a. First, select the earnings code for the payment. Click the Look up Earnings Code button next to the Earnings Code field. 
47.	Select the Earnings Code from the Search Results list that appears. Remember, the earnings code describes the type of payment. For this example the employee is receiving a \$18,000 add comp using earnings code HOA. Click the HOA link. HOA
48.	Next, enter the end date for the add comp, i.e. the last day it is to be paid. Click in the Earnings End Date field. arnings End Date

Step	Action
49.	<p>This is a payment received over the course of the fiscal year. The employee is to receive the \$18,000 payment over all paychecks from the hire date (7/1/20YY) through the end of the fiscal year (6/30/20YY).</p> <p>The payments begin as of the hire date entered in the template. To end the payments at the end of the fiscal year, the end date is 6/30/20YY.</p> <p>For this example, enter "06/30/2015" into the Earnings End Date field.</p>
50.	<p>Next, enter the combination code to charge the add comp to.</p> <p>Click in the Combination Code field.</p> <p>Combination Code </p>
51.	<p>For this example, we will charge 50% of the add comp payment to a combo code and 50% to another combo code which we obtained prior and we have the number to enter. Note: Combo codes used are for training simulation only.</p> <p>Enter "1000274470" into the Combination Code field for the first allocation.</p>
52.	<p>Now let's enter the dollar amount of the add comp payment the employee is to receive each pay period.</p> <p>Click in the Pay Period Amount field.</p> <p>Pay Period Amount </p>
53.	<p>Enter the per pay period dollar amount of the add comp into the Pay Period Amount field.</p> <p>To do this, take the total payment of \$18,000 and divide it by the number of pay periods in the timeframe from the hire date through the Earnings End Date which equals \$750.</p> <p>However, when charging a payment to multiple combo codes, determine the amount to be charged to each combo code and enter that dollar amount in the field.</p> <p>In this example, the charges for this payment are divided between two combo codes. Let's say each combo code is to be charged equally for the payment. Thus, \$375 each.</p> <p>Hire Date = 7/1/20YY Earnings End Date = 6/30/20YY # of months = 12 # of paychecks = 24 \$18,000/24 = \$750 \$750/2 = \$375</p> <p>Enter "375".</p>
54.	Press [Enter] .

Step	Action
55.	<p>Now let's enter the other allocation for the payment into section 3b.</p> <p>We are entering this in section 3b because it is an allocation of the same payment, payment #3.</p> <p>Press [Enter].</p>
56.	<p>The Earnings Code must be the same for each allocation within a particular earnings code.</p> <p>Enter "HOA" into the Earnings Code field.</p>
57.	<p>Click in the Earnings End Date field.</p> <p>arnings End Date </p>
58.	<p>Enter "06/30/2015" into the Earnings End Date field.</p>
59.	<p>Click in the Combination Code field.</p> <p>tion Code </p>
60.	<p>Enter "100289851" into the Combination Code field.</p>
61.	<p>Enter "375" into the Pay Period Amount field.</p>
62.	<p>Press [Enter].</p>
63.	<p>A comment is required for every add comp example. The comments field is at the end of each add comp payment section.</p>
64.	<p>The add comp payment is complete.</p> <p>The charge to multiple combo codes for add comp payment #3 is complete.</p> <p>The employee will receive \$750 per pay period for this add comp and the combo codes will each be charged \$375 for the payment.</p> <p>The template can be submitted into workflow for review.</p>
65.	<p>You have successfully completed the "TBH Multiple Add Comp Payments" Charging Multiple Combo Codes" topic. You can now move on to the "Saving and Submitting Templates" where you will learn how to save and submit templates into workflow for approver review.</p> <p>End of Procedure.</p>

Save and Submit the Template-Based Hire Transaction

Review, Save and Submit the Transaction

Now that the financial information for the hire/rehire is entered, the salary distribution section (required) and additional compensation payment(s) (if applicable), you are ready to submit the transaction through workflow for review and approval. Review the information entered for accuracy and click the "*Save and Submit*" button on the bottom of the page. The transaction will leave your initiator queue and move into the worklist of the 1st level approver(s) in the home department.

Save the Transaction for Later

If you are not ready to submit the transaction because you are waiting for information or need to confirm an item entry, click the "*Save for Later*" button and the transaction will remain in initiator status where you, and only you, can access it and update it with new information.

How do I access a saved transaction?

When you save a template-based hire transaction for later, the transaction is saved on the initiator's home page in the "Draft Hires to Process" section. Navigate to the "Template-Based Hire" link and any saved transactions appear in the Draft Hires to Process section of the page. The transaction can be accessed and updated, if needed, and submitted into workflow.

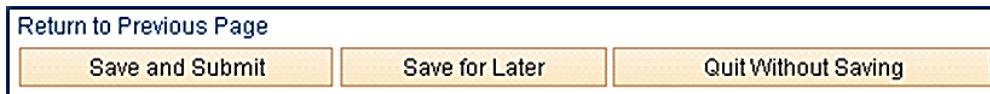
Note: If a transaction was saved for later, and not yet submitted into workflow, it can be deleted. Simply click the box next to the employee name and then select the "Delete Selected Names" button and the transaction will be deleted.

Quit Without Saving

To return to the Search page without saving any entered information, click the "*Quit Without Saving*" button.

Return to Previous Page

To return to the prior page of the template, click the "*Previous*" button.



Training Guide

Template-Based Hires and Labor Accounting



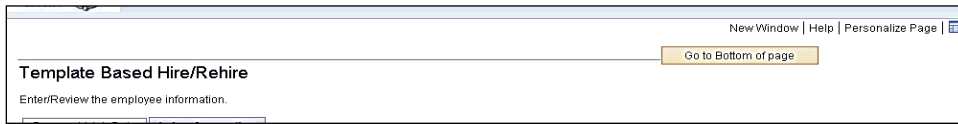
Save the Transaction for Later



Let's practice saving an entered template-based hire transaction to submit at a later time.

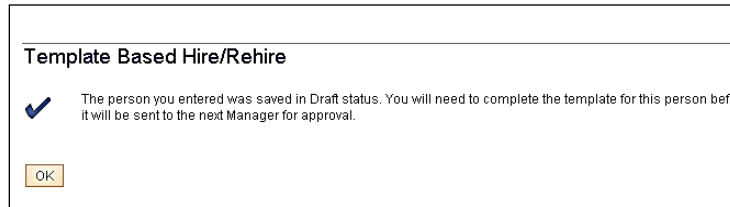
Procedure


This is the "Save the Transaction for Later" topic where you will learn how to save a template-based hire transaction to access at a later time.

Step	Action
1.	This is page 2 of a template. In this example, the Salary Distribution and an Add Comp was entered. Before submitting into workflow, let's Save the Transaction for Later.



Step	Action
2.	Click the Go to Bottom of page button. 
3.	These action buttons appear at both the top and the bottom of the page. We are at the bottom of the page. To save the transaction to access at a later time, click the Save for Later button. 



Step	Action
4.	A Save for Later Confirmation appears. Click the OK button. 
5.	The transaction now appears in the Draft Hires to Process section of the Initiator's Template-Based Hire Page in PAC.
6.	You have successfully completed "Save the Transaction for Later" topic. You can now move on to the next topic "Access a Saved for Later Template-Based Hire Transaction" where you will learn how to access the saved template-based hire transaction. End of Procedure.

Access a Saved for Later Template-Based Hire Transaction

Let's practice accessing a saved transaction that was not submitted into workflow.

Procedure

This is the "Access a Saved for Later Template-Based Hire Transaction" topic where you will learn how to access a saved for later template-based hire transaction in PAC.

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

Transaction Template ?

Transaction Type: All
Select Template: HIRE-ADMIN Hire all types of Administrative Staff

Transaction Type: All

Select	Transaction Type	Effective Date	Name	Person ID	Action	Country
<input type="checkbox"/>	HIRE	02/03/2015	George Eliot	NEW	Hire	United States
<input checked="" type="checkbox"/>	HIRE	02/09/2015	John Smith	NEW	Hire	United States

Go To: Hire/Rehire Status

Step	Action
1.	<p>From the Draft Hires to Process section of the Initiator's Template-Based Hire Page, click on the Employee Name to access the saved template.</p> <p>For this example, click the John Smith link.</p> <p>John Smith</p>

Template Based Hire/Rehire

Name John Smith

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

Template Hire all types of Administrative Staff

Organizational Relationship Employee

Country United States

Category Code Administrative Positions

***Employee ID**

***Job Eff Date (Hire Date)**

Action Hire

Reason Code New Hire

Step	Action
2.	<p>You will be brought to the Hire Details box where the Hire Date was entered. The fields are still open which allows for entry of any changes.</p> <p>Click the Continue button.</p> <p><input type="button" value="Continue"/></p>

Template-Based Hire Form

Enter/Review the employee information.

Personal / Job Data | Labor Accounting

Employee Information

National ID (SSN)

*National ID (SSN) 422566789

Primary Name - English

*Name Prefix Dr.

*First Name John

Middle Name

*Last Name Smith

Name Suffix


Home/Permanent Address (Required)

*Address Type Home

*Address Line 1 1234 Main Street

Address Line 2

Address Line 3

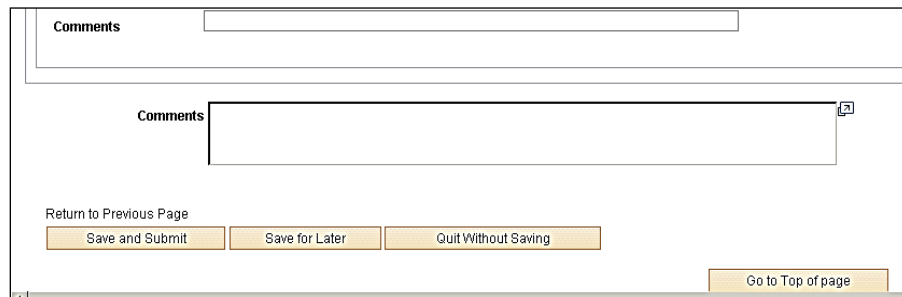
Step	Action
3.	<p>Now we are at page 1 of the template. Note the fields are still open to allow for changes.</p> <p>Click the Labor Accounting tab to advance to page 2 of the template.</p> <p></p>
4.	<p>Now we are at page 2 of the template. Note the fields are open to allow for data entry.</p>
5.	<p>You have successfully completed "Access a Saved for Later Template-Based Hire Transaction" topic. You can now move on to the next topic "Save and Submit a Template-Based Hire Transaction" where you will learn how to submit a template-based hire transaction into workflow.</p> <p>End of Procedure.</p>


Save and Submit the Template-Based Hire Transaction

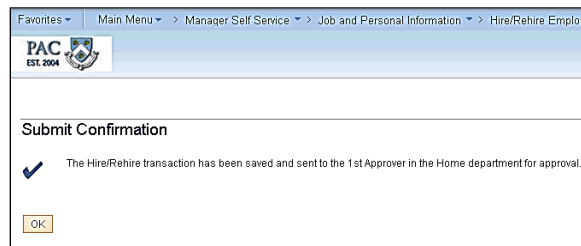
Let's practice saving and submitting a template-based hire transaction.

Procedure

This is the "Save and Submit a Template-Based Hire Transaction" topic where you will learn how to submit a template-based hire transaction into workflow.



Step	Action
1.	<p>This is page 2 of a new hire template. We saw how to advance from selecting a template to page 1 and through to page 2. On page 2 at both the top and bottom of the page is the "Save and Submit" button. Clicking this button saves and entered data and submits the transaction into workflow for review.</p> <p>Click the Save and Submit button.</p> 



Step	Action
2.	A confirmation appears. Click the OK button.
3.	<p>Once the "OK" button is clicked on the confirmation page, you are returned to the Initiator's template-based hire home page.</p> <p>If the transaction was saved prior, note that the transaction no longer appears in the Draft Hires to Process Queue.</p>
4.	<p>You have successfully completed the "Save and Submit a Template-Based Hire Transaction" topic. You can now move on to the next lesson, "Template-Based Hire Workflow" where you will learn the workflow for template-based hire transactions.</p> <p>End of Procedure.</p>

Submit Paper TBH and Labor Accounting Forms

Submit Paper TBH and Labor Accounting Forms

There are a few exceptions when you cannot hire someone using TBH. These situations require you to submit a paper hire/rehire form along with a paper Labor Accounting Form (PAC) - Salary Distribution and Additional Compensation (<http://finance.columbia.edu/forms/index.html#hrpc>) to the HRPC.

- Employees without a social security number
- Employees hired with multiple jobs
- Employees who were hired more than 3 months prior to the date you are initiating the transaction
- Academic personnel with stipends (postdoctoral research fellows and postdoctoral clinical fellows)
- Academic personnel who are reappointed on rosters
- Academic personnel going on leave immediately upon hire

The paper hire/rehire forms are the New Hire Personnel Action Form, used for administrative staff and the Nomination Form, used for academic hires. For more information on using paper hire/rehire forms, visit the HR Manager Toolkit (<http://hr.columbia.edu/>) on the HR Website.

Suspense Charges

Suspense Charges

What is Payroll Suspense?

When an employee is paid, the earnings need to be allocated to a single or set of combo codes (representing ChartStrings.) If during the course of employment, an employee's earnings are allocated to combo codes that are no longer active, the expense defaults to departmental suspense. Entering salary distributions at the time of hire greatly reduces dollars allocated to suspense because the regular earnings are allocated as of the hire date.

Salary Distributions when a Grant is not Established

What happens if the Salary Distribution is to be charged to a Grant that is not yet established?

Each department has a default combination code and you may charge this code. There are two funding allocations for suspense; the Default ChartString and the Suspense ChartString. Both are considered suspense and the difference is that the default ChartString is used to charge salary when the ChartString to charge has not yet been established and the suspense ChartString is charged when the ChartString/Combo Code to which an employee's earnings are being charged has expired, reached a limit or becomes inactive. Both types are department specific.

Once the grant is established, the salary distribution profile must be modified to allocate earnings to the correct combination code(s) as well as to move dollars out of suspense and into the correct combination code(s). This step is completed by either creating a retroactive salary distribution or a salary distribution and a separate cost transfer transaction. Training for these functionalities is available in the Course Catalog on the HR Website.

Template-Based Hire Transactions Workflow

This is the *Template-Based Hire Workflow* lesson of the *Template-Based Hires and Labor Accounting* course. Upon completion of this lesson, you will be able to:

- Recall the Template-Based Hire Transaction Workflows and the required approval levels
- Using the Payroll Calendar, understand the relationship between the Initiated Date, Approved Date and Template-Based Hire Transactions

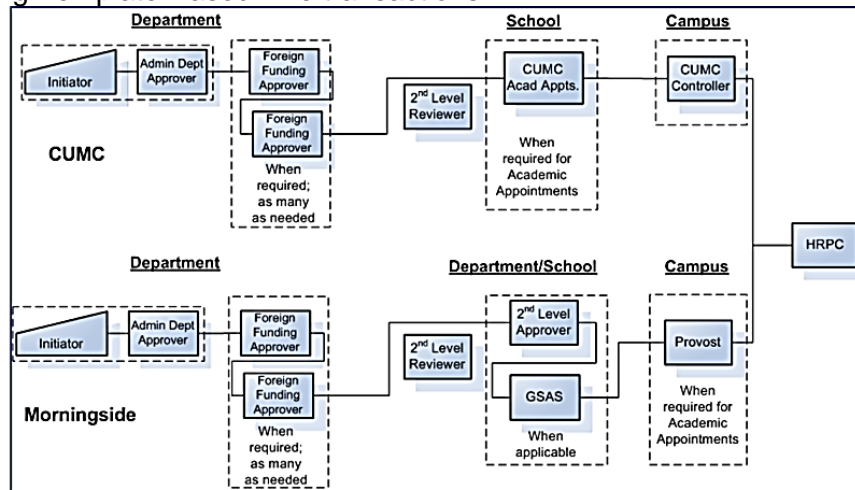
Estimated Time to Complete Lesson: 2 minutes

For more information on workflow, roles and access, reference the *Introduction to PAC* course.

Template-Based Hire Transactions Workflow

Hire/Rehire Workflow

Below is a representation of the Hire Rehire workflow. This is the path followed when submitting Template-Based Hire transactions.



The Initiator gathers and enters information into the transaction pages. The transaction then moves to the approver(s) who review and approve the transaction. The Human Resources Processing Center (HRPC) is the final stop along the workflow and completes the hire process and adds the person into PAC. There are several levels of approvers in the Hire Rehire workflow. The number of approvers required to review and approve a transaction is determined by the type of hire and the funding department(s).

Earnings charged outside the admin department will be approved by the foreign funders. 2nd Level Approvers provide the next level of review. Academic transactions are approved by the Office of Faculty Affairs at CUMC or by the school or department at Morningside.

The Graduate School of Arts and Sciences approves all student officer appointments for the Arts and Sciences. Administrative transactions are approved by the Payroll Office at CUMC or by the school or department at Morningside. 3rd Level Approvers provide the final level of review. Academic transactions are approved by the Payroll Office at CUMC or by the Provost's Office at Morningside. There is no 3rd level approval required for administrative transactions.

Only the Initiator or 1st Approver in the admin department can make changes to a template. If any subsequent approver needs to make changes, he/she must recycle the transaction so the admin department 1st level approver can make the requested changes.

Using the Payroll Calendar

Template-Based Hire Transactions and the Payroll Calendar

Now that we reviewed workflow, let's review the relationship between the Initiated Date, Approved Date and Template-Based Hire Transactions.

The initiated date is system generated when the transaction is created. The transaction then goes to the 1st level home department for approval and then to any 1st level foreign department approvers if indicated by the combination codes entered. Next, the transaction goes to the 2nd level approval, if needed, and then on the 3rd level, for final approval.

As per the CUMC or Morningside Payroll Calendar, if final approval of the template occurs in advance of the *PAF, Nomination Forms & TBH Date* listed for the pay period, the template will be routed to the HRPC for completion of the manage hire process and entry into PAC. The employee will receive a pay check as of the Check Date listed along with any retroactive pay due. The employee will also be assigned an employee ID and will be able to enroll in the Columbia University Benefits (as eligible).

If the template receives final approval after the *PAF, Nomination Forms & TBH Date* for a payroll, the template will be routed to the HRPC for completion of the manage hire process and entry into PAC, however, the employee will not receive pay until the following pay period.

Visit the Payroll Calendar section of the HR Website for more information.
<http://hr.columbia.edu/helpful-tools/hr-manager-toolkit/managing-staff/managing-pay/pay-transactions/pay-calendar>)

Note the date for hire/rehire transactions to receive final approval, and thus received by HRPC, to ensure entry into PAC effective for that pay period.

Columbia University Pay Calendar for July 2012 to June 2013								
Type of Payroll	Pay Run ID	Period Covered	PAF, Nomination Forms & TBH HRPC Mail Closing Date	FFE Entry Period	Labor Accounting Add Comp		View on Web Date	Check Date
					Dept. Admin.	Final Approve		
Biweekly	BWK-12-027	06/18/12 - 07/01/12	Fri 06/22/2012	06/27/12 - 06/29/12			07/03/12	07/06/2012
Weekly	BWK-12-027	06/25/12 - 07/01/12	Fri 06/22/2012	06/27/12 - 06/29/12			07/03/12	07/06/2012
Semi-Monthly	SMP-12-013	07/01/12 - 07/15/12	Fri 06/29/2012		Fri 06/29/12	Fri 07/06/12	07/11/12	07/13/2012
Weekly	WKL-12-028	07/02/12 - 07/08/12	Fri 06/29/2012	07/04/12 - 07/09/12			07/11/12	07/13/2012
Biweekly	BWK-12-029	07/02/12 - 07/15/12	Mon 07/09/2012	07/11/12 - 07/16/12			07/18/12	07/20/2012
Weekly	BWK-12-029	07/09/12 - 07/15/12	Mon 07/09/2012	07/11/12 - 07/16/12			07/18/12	07/20/2012
Weekly	WKL-12-030	07/16/12 - 07/22/12	Mon 07/16/2012	07/18/12 - 07/23/12			07/25/12	07/27/2012
Semi-Monthly	SMP-12-014	07/16/12 - 07/31/12	Fri 07/20/2012		Wed 07/18/12	Wed 07/25/12	07/28/12	07/31/2012
Stipend / Retiree	STR-12-008	08/01/12 - 08/31/12	Fri 07/20/2012				07/28/12	08/01/2012

Transaction Status and Location

This is the *Transaction Status and Location* lesson of the *Template-Based Hire and Labor Accounting* course. Upon completion of this lesson, you will be able to:

- Determine Status and Location of Transactions

Estimated Time to Complete Lesson: 5 minutes

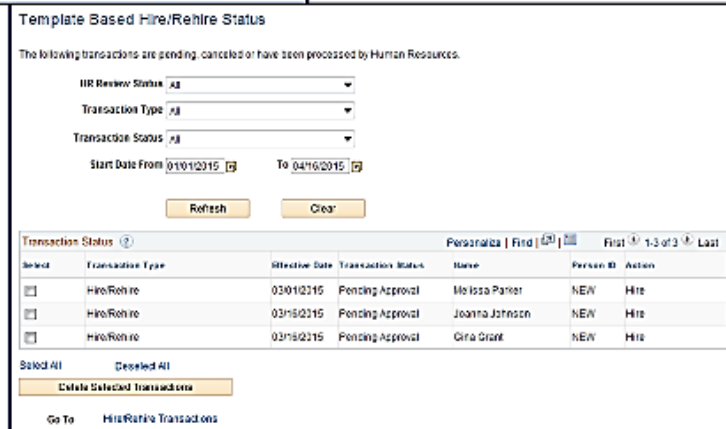
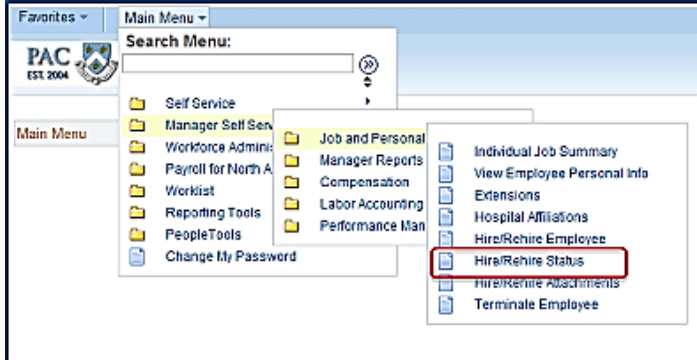
Template-Based Hire Status-Initiators

Template-Based Hire Status Page - Initiators

In the Job and Personal Information folder, there is also a page accessible to initiators where you can see which hire/rehire transactions are pending approval by an approver or processing by HRPC, or that have been denied by an approver or HRPC, or processed by HRPC.

To view the status of a template-based hire that you as the initiator submitted, click on the Hire/Rehire Status link from within the Job and Personal Information folder.

Note: The Template-Based Hire Status Page provides a view only status of template transactions initiated by yourself as the initiator. A transaction is not accessible from this page, only viewable. You cannot see other Initiator's transactions from this page.

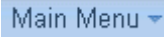




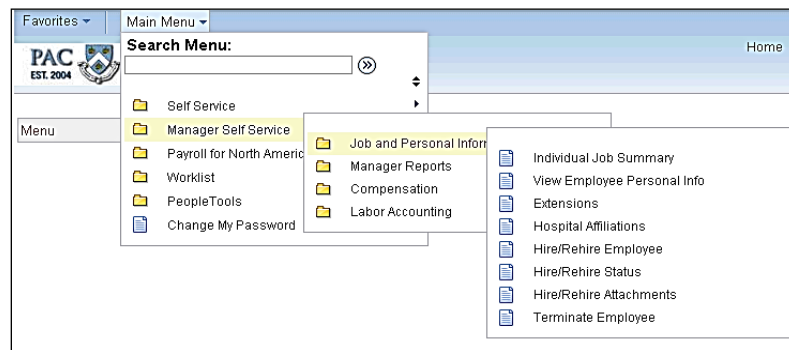
Navigate to Template-Based Hire Status-Initiators


Let's navigate to the Template-Based Hire Status page where Initiators view the status of submitted hire/rehire templates.

Procedure

This is the "Navigate to Template-Based Hire Status-Initiators" topic where you will learn how to search for the status of submit template-based hire transactions *submitted by yourself as the initiator*. Remember, this is a view only page of the Initiator's transactions. You cannot see other Initiator's transactions in this page.

Step	Action
1.	Click the Main Menu button. 
2.	From the PAC Main Menu, click the Manager Self Service menu. 
3.	Click the Job and Personal Information menu. 



Step	Action
4.	Click the Hire/Rehire Status menu. 
5.	You arrive at the Template-Based Hire/Rehire Status page. Note that the information is only viewable and cannot be accessed from this page.
6.	You have successfully completed the "Navigate to Template-Based Hire Status-Initiators" topic. You can now move on to the next lesson, "Pending Transactions Page" where you will learn how to view Pending Transactions for all labor accounting transactions. End of Procedure.

Locating Transactions in Workflow - Approver View

Workflow Status

Approvers access transactions submitted into workflow via the Worklist. Within the worklist is a Workflow Status page which provides the location of transactions currently in workflow. This page is not viewable to the Initiator Only role. If you have the Initiator Only role, contact a department approver(s) who can locate where a transaction is in the workflow.

Workflow Status Page Filter

On this page, a list of transactions currently in workflow appear on the displayed list. On the top section of the page are Filter Options used to locate a specific transaction or group of transactions. This feature is helpful when looking for a specific transaction and you have the name, employee ID or Transaction ID.

Locate Transaction in Workflow

Next to each transaction is a "Details" link. Clicking on this link displays the status, details and current location of the transaction in workflow.

Workflow Status and the Current Active Worklists Section

On the bottom of the Workflow Page is a "Current Active Worklists" section that lists which approvers can review the transaction at the level indicated.

If you are an approver, more information and details on the Workflow Status page and the Worklist can be found in the Approver course.

Course References

Course References

You can access the Lesson, Job Aids, Policies, and Procedures that were referenced throughout this course in the Course Catalog (<http://hr.columbia.edu/course-catalog/search>) on the HR Website:

Lesson:

Template-Based Hires and Labor Accounting Transactions Course Training Guide

Job Aids (located in the Course Catalog in the HR Website):

TBH Academic Hire/Rehire Workflow
TBH Administrative Hire/Rehire Workflow
Create a Combo Code Job Aid
Search Combo Codes Job Aid
ChartFields, ChartStrings and Combo Codes in PAC

Websites:

HR Manager Toolkit (<http://hr.columbia.edu/helpful-tools/hr-manager-toolkit>)
Columbia University Human Resources Website (<http://hr.columbia.edu/>)
Course Catalog (in the HR Website) (<http://hr.columbia.edu/course-catalog/search>)
CourseWorks (<https://courseworks.columbia.edu/welcome/>)
HR Service Center (<http://hr.columbia.edu/helpful-tools/hr-manager-toolkit/human-resources-service-center>)

Knowledge Assessment

Congratulations! You have successfully navigated through the instructional portion of *Template-Based Hire and Labor Accounting Transactions* course. We hope that the concepts and skills you have learned in this course have prepared you for your day to day tasks.

Please complete the required knowledge assessment associated with this course. Successful completion of this knowledge assessment (a passing grade of 90%) is required to receive credit for the courses and to gain access to the Template-Based Hire functionality in PAC.

To access and complete the knowledge assessment, click on the following link. You will be prompted to log in with your UNI and Password to access CourseWorks.

Template-Based Hire and Labor Accounting Transactions Knowledge Assessment _April 2015 (<https://courseworks.columbia.edu/samigo-app/servlet/Login?id=0ca4ee8b-c782-4c51-ba50-7f2bd2add6431429126334381>)

Estimated Time to Complete Assessment: 10 minutes

Glossary

Add Comp	Additional Compensation Payment. Also known as Additional Pay or Add Pay.
ARC	Accounting and Reporting at Columbia, our finance system.
ChartFields	The fields that store the Chart of Accounts (COA) and provide the system with the basic structure to segregate and categorize transactional and budget data.
ChartStrings	The combination of ChartFields and the level at which accounting charges and credits are applied.
Combination Code	A 10-digit system-generated number representing a unique ChartString. It is not a characteristic <u>of</u> the ChartString, it is a representation of it. Combo codes are required by PAC to assign labor charges. Also known as combination code.
Combination Code Amount	In add comp transactions, the combination code amount is <i>the dollar amount of the Total Earnings Code Payment</i> charged to a particular ChartString. In salary distribution transactions it is the <i>dollar amount of the salary</i> to be charged to the ChartString.
Combo Code	A 10-digit system-generated number representing a unique ChartString. It is not a characteristic <u>of</u> the ChartString, it is a representation of it. Combo codes are required by PAC to assign labor charges. Also known as combination code.
Combo Code Amount	In add comp transactions, the combo code amount (or combination code amount) is <i>the dollar amount of the Total Earnings Code Payment</i> charged to a particular ChartString. In salary distribution transactions it is the <i>dollar amount of the salary</i> to be charged to the ChartString.
Earnings Code	Specifies the type of payment with related tax withholding, benefits information and fringe rate. Also known as Earn Code.
Field	An area on a page that displays or requires data.
Funding End Date	The end date on an employee's salary distribution profile which indicates the last day the employee's regular earnings should be charged to the combo code.
Labor Accounting	Manages an employee's salary profile, additional compensation,

and cost transfers.

PAC

People@Columbia. The customized version of PeopleSoft Human Resources Capital Management that integrates and processes all Human Resources and Payroll transactions for Columbia University including hire/rehire, salary distribution, additional compensation and cost transfer transactions.

Pay Period Amount

The dollar amount of an add comp payment an employee will receive each pay period. It is calculated by PAC in the Add Comp module and user calculated in Template-Based Hire.

PC

Petty Cash - cash held in department for small or emergency purchases.

Period Amount

The Period Amount is the *amount of regular earnings* to allocate for the timeframe *beginning on the Profile Effective Date through the Funding End Date*. It is used to calculate the percent distribution when a combo code amount is entered. Used in Salary Distribution transactions.

Project

A specific funding source. The First (highest) level at which you can budget and record project activity. Projects are generally set up where a separate fund balance must be tracked and carried forward.

Receiving

A system record of goods received from purchase orders.

Salary Distribution

The process by which departments communicate charges to the University's accounting system, ARC, for regular earnings for faculty and staff.

TBH

Template-Based Hire. A function within PAC where new hire and rehire transactions are initiated electronically in the departments and schools through PAC templates.

Workflow

The routing of transactions based on rules.