

eCompensation – Training Guide

Visit the [HR Manager Toolkit](#) for more information on HR related policies, processes and training.

eCompensation Overview

eCompensation (or eComp) is a function within People@Columbia (PAC) where annual merit increases are electronically submitted and approved in the departments and schools. It is also used to reappoint faculty for the 7/1 - 6/30 academic year. An electronic workflow allows for a paperless approval process.

The eComp system opens each year for several weeks in May and June for changes effective July 1, the beginning of the new fiscal year.

Access to eComp is targeted to employees at Columbia University who submit and review eComp transactions for their assigned department(s). They also work closely with the Human Resources Business Partners and Compensation team for officers of administration and with the Associate Provost for Academic Appointments for academic personnel to ensure all required steps and documentation are completed to support the process.

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eCompensation Workflow and Roles

A Workflow is the routing of transactions based on rules. Workflow is used in PAC to route transactions for approval and processing. Within each workflow, there are levels of reviewers and transactions will "stop" at each level for review and approval as needed.

There are two roles within eComp, the Submitter and the Reviewer. A Submitter enters the transaction data for their assigned department(s) into PAC and a Reviewer approves the transactions for their assigned department(s). Depending upon the department structure, there is one Submitter and up to two Reviewers. In some departments the Submitter is also the 1st Level Reviewer in a combined role that submits and approves in one step. In some departments, the roles of 1st and 2nd level Reviewers are held separately. In this format, the Submitter enters the transaction and each Reviewer approves. See the diagram on the next page for a visual of the workflow.

The Submitter Role

A Submitter enters and submits the annual merit increases into the eComp module in PAC. Only Submitters can enter compensation data. The department(s) and employee groups that can be accessed in the module are assigned by your department.

The Reviewer Role

A Reviewer confirms and approves submitted eComp data. Reviewers cannot enter data, only view and approve. The department(s) and employee groups that can be accessed in the module are assigned by your department.

Once reviewed, Reviewers can take one of the following actions:

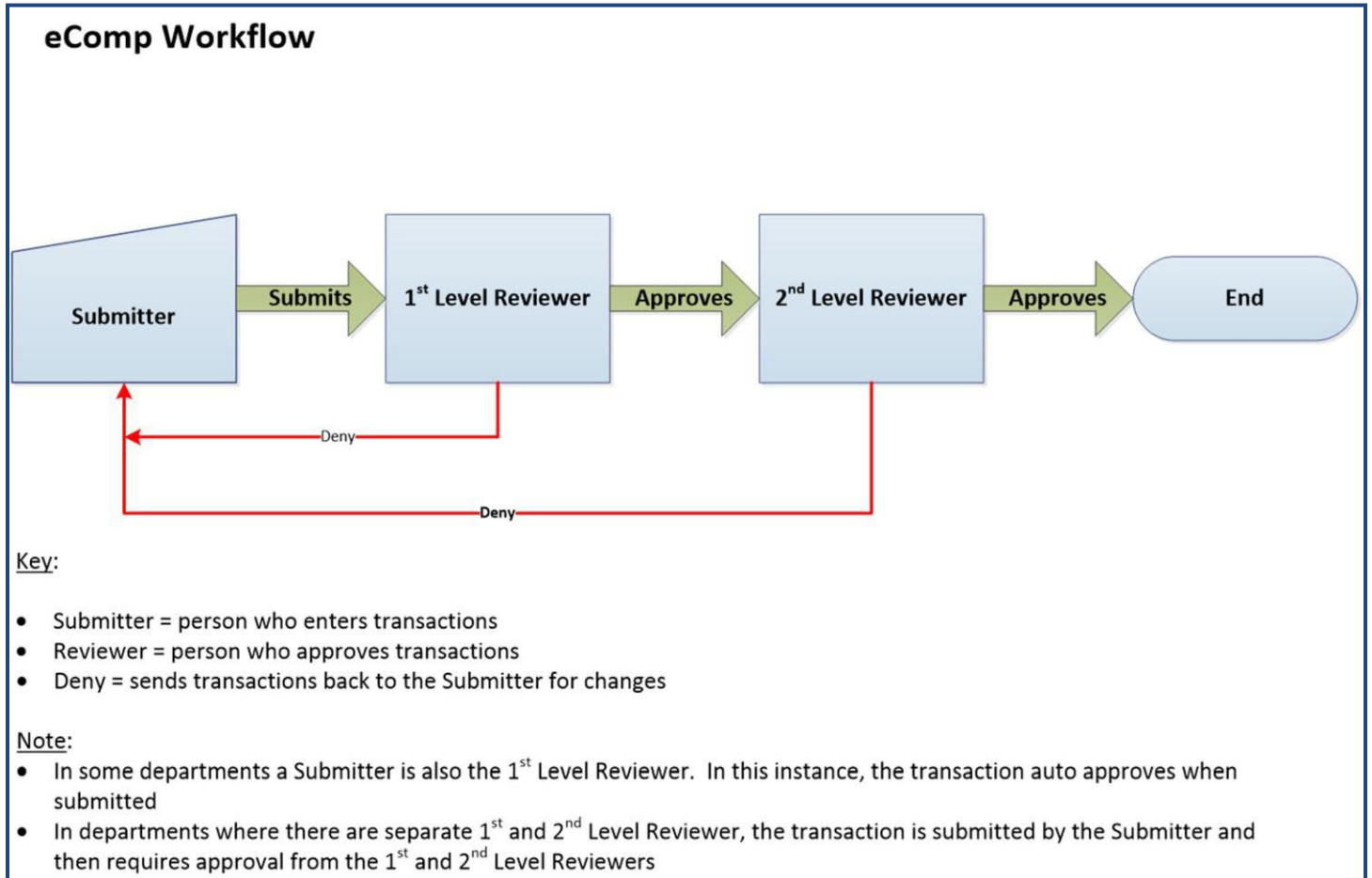
- **Approve.** This either sends it forward in the workflow process to the next level Reviewer or completes the approval process if it is the final approval
- **Deny.** This sends transactions back to the Submitter to make changes

Important!

Be sure to communicate with each other during the entry and review process. The eComp tool does not provide notifications so it is important to keep in touch. For example, Submitters should let their Reviewers know that a group was submitted and Reviewers should let Submitters know when a group is approved/denied.

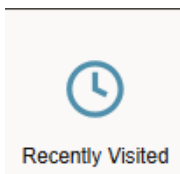
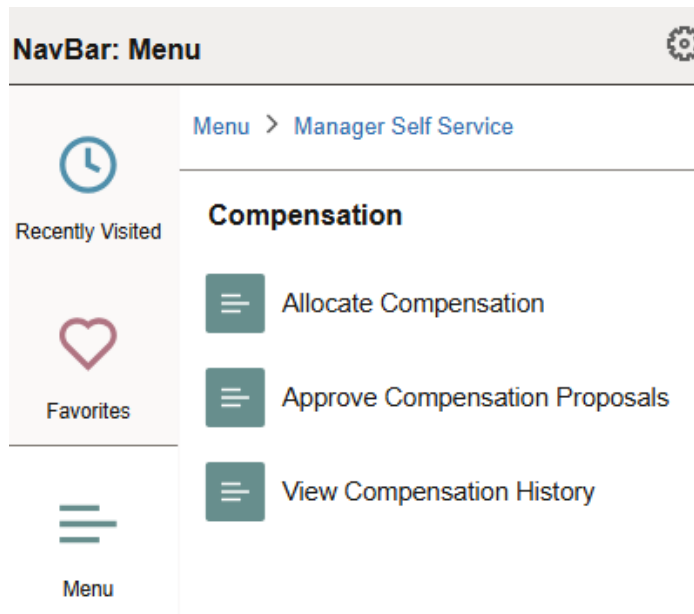
eCompensation Workflow

Below is a representation of the eComp workflow. This is the path eComp transactions follow when submitted.



Accessing eCompensation

1. Navigate to the my.Columbia portal @ <https://www.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 – Note, you must use multi-factor authentication (DUO) to log into PAC
5. The "eCompensation" page is located within the “Compensation” folder within the “Manager Self Service” folder



Once you have accessed the Allocate Compensation and Approve Compensation Proposals screens, you can use the Recently Visited button to quickly navigate back to these screens.

Visit the [HR Website](#) for information on HR related policies, processes and training.

Entering eCompensation Transactions – The Submitter Role

The Allocate Compensation Page

Now that we accessed the eComp module in PAC, let's review the information and options on the "Allocate Compensation" page. The "Allocate Compensation" page is located within the Compensation menu within the "Manager Self Service" menu.

This page displays the following information in columns and can be sorted by clicking on the column header.

- Cycle Name - the employee group within a department. The cycle groups include: Tenured Faculty, Non-Tenured Faculty, Officers of Research, Officers of the Libraries, Student Officers, Officers of Administration, and Non-Union Support Staff
- Group Name - the department name
- Role - Submitter or Reviewer
- Department - the department number
- Status - the state an employee group is in within the process

Group Status Definitions:

- Calculated - the initial state. Allocations have not yet been made to any employee in the population
- In Progress - compensation allocation data was entered and saved but not yet submitted to the next Reviewer. Reviewers for this group will see a status of "In Progress" and can view the data. Revised values of Total Proposed and Balance have been calculated based on the proposed allocations
- Submitted - allocation data was submitted for review and is in the Reviewer's queue
- Denied - data was sent back to the Submitter to make changes
- Confirmed - allocations have been approved by the Reviewer(s) and are waiting to be loaded and finalized in PAC
- Completed – allocations have been loaded and finalized in PAC
- Completed with Errors – allocations have been loaded and finalized in PAC with the exception of errors

The following actions are available on the "My Compensation Activities" section bar.

- Personalize - this option allows you to make changes to the order and sorting of columns
- Find - click here and enter text to locate an item on the list
- Zoom - click the icon to the right of the Find link to bring up a separate window that displays the compensation activities. Once you access a specific Cycle, this feature displays the employee data in a separate window

To access an employee group, simply click the link in the *Cycle Name* column.

Allocate Compensation

Select a Compensation Activity

Review and allocate compensation for your Employees.

Andrea Beharry

Instructions

Select the Cycle Name link to perform actions for the listed activities.

My Compensation Activities

Cycle Name	Group Name	Role	Department	Status
FY20XX Admin	"Department Name"	Submitter	123456X	Confirmed
FY20XX Admin	"Department Name"	Submitter	1234561	Confirmed
FY20XX Admin	"Department Name"	Submitter	1234562	Confirmed
FY20XX Admin	"Department Name"	Submitter	1234563	Confirmed

Allocate Compensation Page - View Summary Data

Once a cycle name is selected, the department summary data and individual employee data displays. In addition to displaying the information, this page allows you to enter proposed increases and calculates the total proposed amount while providing a balance of any funded amount remaining.

Let's review the information on this page.

Organization Summary Data section

Here you will see salary and amount totals along with a Balance field that displays the remaining amount of dollars left to allocate. This data is inclusive for all parent and child departments in your purview. Where you have parent/child relationships in your department tree access, you are defaulted to the parent department. More to follow on department dependencies.

The columns of information in this section include:

- Plan - the type of comp plan, e.g. FY20XX Merit
- Total Eligible Employees - employees eligible for merit increases
- Total Eligible Salaries - the total salary of all eligible employees listed in this group (including any indirect reports)
- Total Funded Amount - the amount of dollars to spend on merit increases

- Total Proposed Amount - the total amount of dollars spent on increases. This begins at \$0 and increases as entries are made to individual employee data
- Balance - the balance of dollars left to spend between the Total Funded Amount (provided) and the Total Proposed Amount (entered)

Note: Where a parent/child department relationship exists, the summary includes all employees and totals. Once a child department is selected, the summary data displayed is for that child department only. To return to the Allocate Compensation Home page, click the "Back to Compensation Activity" link on the bottom left of the screen (not shown in picture below)

Allocate Compensation ← Your name and role appear at the top

Employee Name: _____
Current Role Submitter

Save for Later Discard Changes Submit

Planning Currency USD US Dollar

Summary Data

Analytics
▼ Compensation Analytics

Department Name > 123345X - Department Name - FY20XX Off of Admin

Organization Summary Data ⓘ

My Direct Reports ⓘ

Analytics	Plan	Total Eligible Employees	Total Eligible Salaries	Total Funded Amount	Total Proposed Amount	Balance
Analytics	FY20 Merit	4	262,859.80	7,885.00	7,885.00	0.00

[Back to Compensation Activity](#)

Processing for Multiple Departments

When processing eComp transactions for multiple departments, you must first submit Indirect Reports (child) departments before submitting the Direct Reports (parent) department.

Allocate Compensation

Employee Name:

Current Role Submitter

Save for Later

Discard Changes

Submit

Planning Currency USD US Dollar

Analytics

▼ Compensation Analytics

123456X - Dept Name - FY20XX Off of Admin

Organization Summary Data

Organizational Summary

My Direct Reports

Analytics	Plan	Total Eligible Employees	Total Eligible Salaries	Total Funded Amount	Total Proposed Amount	Balance
Analytics	FY20 Merit	11	1,285,237.80	38,558.00	30,103.00	8,455.00

Direct Reports

Name	Employee ID	Employment Record	Status	Current Salary	Change Amount	Proposed Percent	Proposed Annual Rate	Position Title
Doe, John A	1234567	0	Invite	168,920.00	5,068.00	3.00	173,988.00	"Position Title"
Smith, Jane	1234568	0	No Increase/Reappoint	261,817.00	0.00	0.00	261,817.00	"Position Title"

The Parent Department and the employee(s) (Direct Reports) in that department

Indirect Reports

Department ID	Name	Group Status	Balance	Total Eligible Salaries	Total Funded Amount	Funded Percent	Total Proposed Amount	Proposed Percent	Status Date
1234561	"Department Name"	Confirmed	0.00	767,950.00	7,985.00	1.00	7,985.00	1.00	03/27/19 12:05PM
1234562	"Department Name"								

The Children Departments and the employees (Indirect Reports) in those departments. The Indirect Reports (Children) departments MUST be submitted before the Direct Reports (Parent) department

Back to Compensation Activity

Accessing an Indirect Department

Click on the department number link in the Department ID column in the Indirect Report section to display the department and its employees. Once a child department is selected, the department number will display on the top and the Direct Reports section will display the employees for that department. You must submit each child department prior to submitting the parent department.

CTV Contracts & Compliance > 1804104 - CTV Compliance - FY2020 Off of Admin

Organization Summary Data

My Direct Reports

Analytics	Plan	Total Eligible Employees	Total Eligible Salaries	Total Funded Amount	Total Proposed Amount	Balance
Analytics	FY20XX Merit					

When you select an Indirect Department, you can see the department number listed here. The direct Reports section will now show employees in that department. To toggle back to the Parent Department, Click the department number here.

Direct Reports

Name	Employee ID	Employment Record	Status	Current Salary	Change Amount	Proposed Percent	Proposed Annual Rate	Position Title	Salary Grade
Franco, James	12345678	0	Update	98,642.00	4,932.00	5.00	103,574.00	"Position Title"	012

Viewing Individual Employee Data

Allocate Compensation Page - View Individual Employee Data

In the Direct Reports section, you will see the list of employees included in this department group along with their current salary, job title, location, department and hire date. Remember that if you have multiple departments in your purview, the Direct Reports listed initially are for the parent department. Check the department numbers listed above the Organization Summary Data to confirm.

Important! This section may only display a portion of the employee list upon initial access. Check the number of items displayed in the Direct Reports bar to confirm. If only a portion of the complete list is appearing, click the "View All" button to view the complete list. It is important to view the complete list and allocate the Total Funded Amount amongst all employees and not only to those who appear on the initial page.

Direct Reports section

The columns of information in this section include:

- Name - the employee's name. Click on the employee's name to view the individual's data including the salary history. Entries can also be made in this window. If the salary history does not automatically display, click the triangle to the left of the Salary History menu to expand the section. To return to the employee list page, click the "Return" link toward the top of the page, beneath the employee's name and job title
- Employee ID - the employee ID for the employee
- Employment Record - the job record that you are updating. Be sure to make updates to the correct job record
- Status – indicates the action applied to the employee
- Current Salary – current salary for the employee/faculty member
- Change Amount - the dollar amount of the proposed increase. This amount automatically calculates once either a Proposed Percent or Proposed Annual Rate is entered. You may also enter a dollar amount into this field. If a dollar amount is entered, the system will calculate the percentage of the increase and Proposed Annual Rate and display it in the Proposed Percent and Proposed Annual Rate fields, respectively
- Proposed Percent - the percentage of the proposed increase. This amount automatically calculates once either a Change Amount or Proposed Annual Rate is entered. You may also enter a percent increase into this field. If a percent increase is entered, the system will calculate the dollar amount of the increase and Proposed Annual Rate and display it in the Change Amount and Proposed Annual Rate fields, respectively
- Proposed Annual Rate - the new salary amount. This amount automatically calculates once either the Change Amount or Proposed Percent is entered. You may also enter a new proposed annual rate into this field. If a dollar amount is entered, the system will calculate the dollar amount/percentage of the increase and display it in the Change Amount/Proposed Percent fields, respectively
- Position Title - the job title for the employee position
- Salary Grade – the salary grade for the position
- Full/Part - the full or part-time status for the employee's position

- Department - the administrative department for the employee (scroll right to view)

To return to the Allocate Compensation Home page, click the "Back to Compensation Activity" link on the bottom left of the screen or the "Allocate Compensation" link at the top middle of the screen (not shown in picture below). Note: screen print is for representation only and does not contain employee data.

Direct Reports

Be sure to "View All" employees

Employee Data

Name	Employee ID	Employment Record	Status	Current Salary	Change Amount	Proposed Percent	Proposed Annual Rate	Position Title
Doe, John A	1234567	0	Update	168,920.00	5,068.00	3.00	173,988.00	"Position Title"
Smith, Jane	1234568	0	No Increase/Reappoint	281,817.00	0.00	0.00	281,817.00	"Position Title"

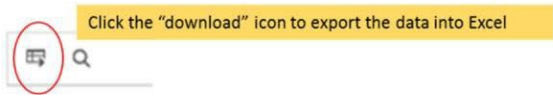
1-2 of 2 | View All

Data can also be exported into Excel and saved by clicking the "download" icon on the Direct Reports menu bar. You can either open the file to view and then save, or save the worksheet first and then open the saved file to view.

Direct Reports

1-2 of 2 | View All

Name	Employee ID	Employment Record	Status	Current Salary	Change Amount	Proposed Percent	Proposed Annual Rate	Position Title
Doe, John A	1234567	0	Update	168,920.00	5,068.00	3.00	173,988.00	"Position Title"
Smith, Jane	1234568	0	No Increase/Reappoint	281,817.00	0.00	0.00	281,817.00	"Position Title"



Entering Salary Changes and Status

Salary Changes

For each employee listed, enter either the Proposed Percent, Change Amount, or Proposed Annual Rate. Up to two decimal points can be entered in the fields. When entering decimals into the Proposed Percent or Change Amount fields, the system will round up or down to whole dollars. For example, \$1,275.75 rounds up to \$1,276.00 and \$1,275.25 rounds down to \$1,275.00.

Once a value is entered in one field, the system calculates the other two fields as well and displays the remaining balance left to allocate.

Submitter Actions:

- Save for Later – click this to save entries and return to the saved information. Once an increase is entered and “Save for Later” is pressed, the status for the cycle changes to “In Progress”. This feature is helpful as it allows the page to be used as a tool to enter different comp variations and discuss the overall allocations with Reviewers prior to the final submittal. Reviewers can also view the entries once saved
- Discard Changes – click this to remove any entered changes up until “Save for Later” is pressed. Once “Save for Later” is used, the system remembers those entries. To make changes simply enter a new value in the field. Please note that this button will not remove changes made to the “Status” column, so please review the “Status” column to confirm that they are correct
- Submit – click this when input is complete and you are ready to send into workflow for review

Key Points:

- Press the Tab key to easily move between fields on the page
- When you arrive at the last employee listed and input a value, first click into another field to ensure the amount calculated and then click “Save for Later”. **DO NOT** press “Enter” to save the data as it will send you back to the home page and not save the data

\$15,151.00 is the Total Funded Amount to be allocated

Total Eligible Salaries	Total Funded Amount	Total Proposed Amount	Balance
505,001.95	15,151.00	0.00	15,151.00

Current Salary	Change Amount	Proposed Percent	Proposed Annual Rate	Current Salary	Change Amount	Proposed Percent	Proposed Annual Rate
100,155.00	0.00	0.00	100,155.00	100,155.00	3,005.00	3.00	103,160.00
62,400.00	0.00	0.00	62,400.00	62,400.00	2,500.00	4.01	64,900.00
52,396.95	0.00	0.00	52,396.95	52,396.95	1,603.00	3.06	53,999.95
94,050.00	0.00	0.00	94,050.00	94,050.00	0.00	0.00	94,050.00
0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

Enter either a dollar amount in the Change Amount field or Proposed Annual Rate field or a percentage in the Proposed Percent field for each employee and the system calculates the other two fields

Dollar amount entered - system calculates percentage and New Rate

Percent entered - system calculates Change Amount and New Rate

New Rate entered - system calculates Change Amount and percentage

Total Eligible Salaries	Total Funded Amount	Total Proposed Amount	Balance
505,001.95	15,151.00	7,382.00	7,769.00

A running total of the dollar amount of the increases entered is calculated in the Total Proposed Amount field and the remaining dollars to allocate displays in the Balance field

Status

The status will default to “No Increase/Reappoint” when you first click into the cycle. Once you input a salary increase, the status will automatically change to “Update”. When no increase is entered, make sure to select the appropriate status for the reason.

Specific reasons include:

- No Increase/Reappoint – This is the default status for all employees. Employees with this status will receive no change to their salary. Non-tenured faculty and officers of research whose salary is not updated will be reappointed at the same salary for the next fiscal year (7/1/YYYY – 6/30/YYYY)

- Deferred/Non-reappoint – This is for academic personnel only when no action is proposed in eComp. Any action will be submitted via PAF. For example: when non-tenured faculty and officers of research are being terminated, put on leave or changing title. Student officers who are not being reappointed should have this deferred status which will lead to their automatic termination before the 7/15 payroll is run
- Promotion – This is for non-academic personnel only. Employee will receive increase through PAF. Therefore, do not input any salary increases for promotions in eComp

*Increases of 8% or more or increases that will bring employees above their grade maximums must be reviewed by CUHR through the Salary Exception Form.

View Approval Status

Once the transaction is submitted you can view the approval status and entered comments by clicking on the "View Approvals Monitor" on the top of the page. Notice that the action buttons are "grayed out" as the transaction has been submitted.

Instructions

You are viewing A&S Earth & Environ Sci organization's plan data for the drill into each employee's data separately.

Save for Later Discard Changes Submit

View Approvals Monitor

Approvals Monitor

Allocate Compensation

Approval by Next Submitter

Compensation Proposal Approvals: Pending [View/Hide Comments](#)

Academic Approval

Pending → Not Routed

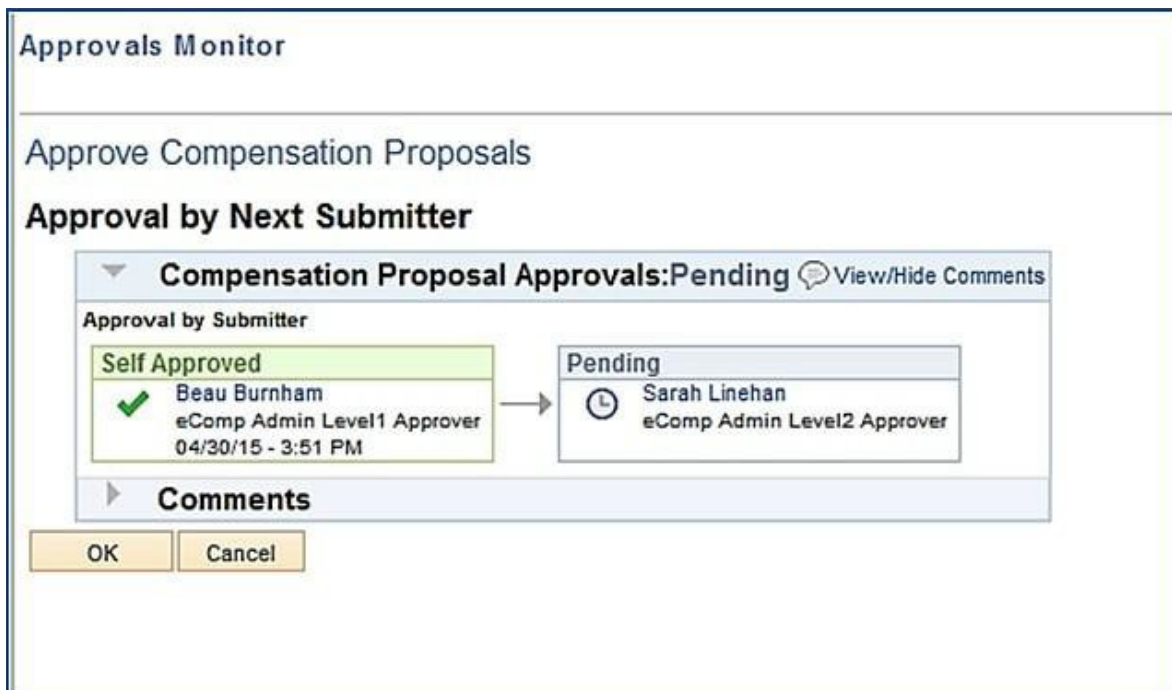
Beau Burnham
eComp Academic Level1 Approver

Betty Kraker
eComp Academic Level2 Approver

Comments

OK Cancel

For departments with two users, the Submitter is also the 1st Level Reviewer and thus "self-approves" the transaction once "Submit" is pressed. When viewing this in the Approvals Monitor, it appears as needing a Level 2 Reviewer but keep in mind it is only one additional reviewer. **Note:** Screen print below for reference. You will see the current year/date in the tool.



Additional Status Interpretations Viewable in the Approvals Monitor:

- Denied (Level 1) and Terminated (Level 2) = denied by the 1st Level Reviewer and the approval chain was terminated before it reached the 2nd Level Reviewer
- Self-Approved or Approved (Level 1) and Denied (Level 2) = approved by the 1st Level Reviewer and denied by the 2nd Level Reviewer

Reviewing an eCompensation Transaction - The Reviewer Role

Reviewing Compensation Proposals

Now that entries were input and submitted from the "Allocate Compensation" page, the transactions are ready for review and approval.

Before accessing the "Approve Compensation Proposals" page where Reviewer actions are submitted, it is necessary to first view the detail for each Group on the "Allocate Compensation" page. The reason for this is that the "Approve Compensation Proposals" page provides only the options to take action for the group but not to view the individual details. Click the "View" button on the "Approve Compensation Proposals" page to navigate to the Allocate Compensation page.

Below is an example of the Allocate Compensation page where some groups are awaiting action from the Submitter or the Reviewer. In this example you can see a group that was submitted and is awaiting review. You can tell this by the Role = Reviewer and the Status = Submitted.

Click on the Cycle Name for a group to view the individual details. Here you will see the Change Amounts, Proposed Percentages, and Proposed Annual Rates.

Remember, you can view details for groups while they are in progress. Once a Submitter clicks the "Save for Later" button, the status changes to "In Progress" and you can review the entries before they are submitted for review. This feature is helpful as it allows the page to be used as a tool to enter different comp variations and discuss the overall allocations prior to the final submittal.

Allocate Compensation

Select a Compensation Activity

Review and allocate compensation for your Employees.

Andrea Beharry

Instructions

Select the Cycle Name link to perform actions for the listed activities.

My Compensation Activities ?

Cycle Name	Group Name	Role	Department	Status
FY20XX Admin	"Department Name"	Submitter	123456X	Confirmed
FY20XX Admin	"Department Name"	Submitter	1234561	Confirmed
FY20XX Admin	"Department Name"	Submitter	1234562	Confirmed
FY20XX Admin	"Department Name"	Submitter	1234563	Confirmed

Approving Compensation

Let's review the information and options on the "Approve Compensation Proposals" page. The "Approve Compensation Proposals" page is located within the Compensation menu within the "Manager Self Service" menu.

This page displays items based on transaction status and the selection defaults to your role. The default selection for 1st Level Reviewers is Pending Review and the default selection for 2nd Level reviewers is Pending Approval. You can locate items with a specific status, such as approved or deny, by selecting the option from the *Transactions* dropdown menu and clicking "Refresh".

To take action for a group, click the "Select" box for the group and click one of the following actions:

- **Approve.** This either sends it forward in the workflow process to the next level Reviewer or completes the approval process if it is the final approval
- **Deny.** This sends transactions back to the Submitter to make changes

You can take a similar action on multiple groups at the same time by selecting the groups and then selecting either "Approve" or "Deny".

Select	View	Begin Date	Cycle	Dept ID	Group	Total Employee Salaries	Total Funded Amount	Total Proposed Amount	Proposed Percent	Funded Percent	Funding Balance	Currency Code	Approval Status
<input type="checkbox"/>	View	07/01/2019	FY20XX Off of Admin	1234565	"Department Name"	608,856	18,266	18,266	3.00	3.00	0	USD	Approval Status

The "Approval Status" link (in the far-right column) displays the status and location of the transaction awaiting approval. See the "View Approval Status" lesson for a visual of the page.

*This page does not provide the detail for the group you want to review. Click the “View” button (in the View column for the group) to view the detail for a group. This will bring you to the Allocate Compensation page. There you will see the employee listing and the individual entries.

Confirming and Changing Data

Once the eComp data is approved it is no longer editable in the tool. Therefore, it is helpful to ensure that the entries and reviews are 100% complete prior to approval. If a change is needed after a group entry has been approved, a PAF must be submitted requesting that the amount input into eComp needs to be replaced and thus overriding the 7/1 action. Be sure to include this note in the Comments section of the PAF. For changes on PAFs, please indicate “SUPERSEDES eComp” in the Comments section of the PAF.

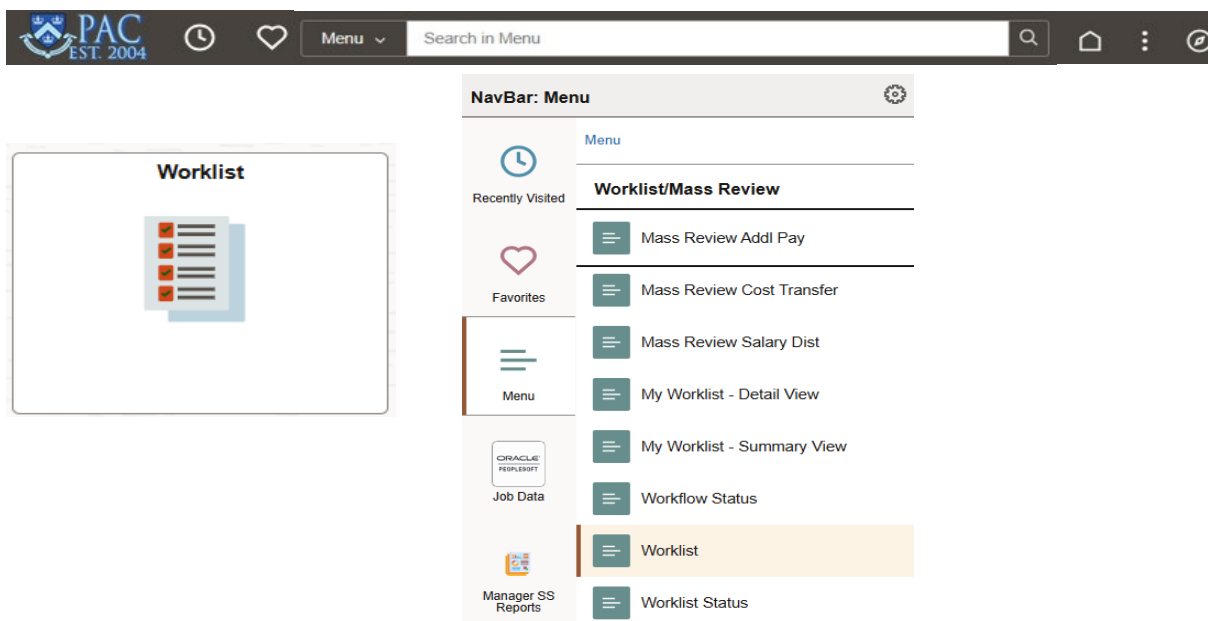
To view the PAF submittal deadlines for non-academic personnel, visit the [Payroll Calendar](#) section of the HR Website.

For academic personnel, please refer to the memo from the Office of the Provost.

To view salary data in your department(s), the Salary Planning Report is available for use during the eComp process. The report is located in the BI Launch Pad and is accessible from the Enterprise Reporting page in the [my.columbia portal](#). It displays "day old" data which means that a report run today will display data entered as of yesterday. It is helpful and recommended to run this report and take a final snapshot of your department(s) salaries at the end of the eComp process.

Worklist

Users can use the Worklist function to approve transactions in eComp. The Worklist tile can be accessed via “Manager Self Service” or by using the Navigation bar and Clicking “Worklist/Mass Review”.



Pending eComp transactions will appear under the “Others” section.

Important Tips

How to clear your cache.

Please remember to clear your cache and browsing history from time to time to eliminate issues in eComp. Users can clear their cache by clicking on Tools > Internet Options via when using Internet Explorer and using “More Tools” when using Chrome.

Internet Explorer

Chrome