Quick Reference Guide - Personnel Administration
Completing a Salary Cost Distribution Form – (page 1 of 2)

Overview – Salary Cost Distribution Form

Complete a Salary Cost Distribution form to add a new salary cost distribution, change existing salary cost distributions, or end an existing salary cost distribution.

The form allows you to change salary cost distributions:
- From the Effective Date you specify onward
- For a specific period only. The Salary Cost Distribution form allows you to insert a change within a window of time that you designate, without impacting other/existing distributions

Prerequisites

- Any supporting/back-up documentation used for approval should be attached to the Salary Cost Distribution form prior to submission. When retroactive changes are made to the Sponsored Programs/PAFO grants, you will be required to provide answers/explanations to questions in the “Additional Fields” section

Notes

- As always, cost distributions on the Salary Cost Distribution form must always total to 100%
- Once submitted, the form’s approval can be monitored via Request Tracker

Accessing the Salary Cost Distribution Form

1. From the BUworks Central portal, based upon your role, begin by selecting either the Manager Self-Service or Payroll Coordinator tab.
2. Click the link labeled Personnel Actions.
3. Via the Organizational Structure area of the screen, click on the Org Unit in which the employee for whom you’ll be completing a Salary Cost Distribution form is assigned. Tip: You can expand the display of the Org Structure by clicking the arrow next to an Org Unit (ex. BNG Administration). You may also find an employee by BUID by entering BUID and clicking on Find Employee.
4. From the display of employees, click the Selection button to choose the specific employee for whom you’ll be completing a Salary Cost Distribution form. Please note that the row becomes highlighted
5. Click Select Form
6. Click the radio button to choose the Salary Cost Distribution form, which will appear in a new window:

Completing the Salary Cost Distribution Form

1. Cost Distribution Effective Date: Indicate the date the salary cost distribution change is effective. Enter a date in the future or for retro-active distributions, enter a date in the past. You have the option of viewing the overview of the distributions in a new window by clicking Cost Distribution Overview located in the upper right corner of the form.
2. Click on Continue Editing Form. The form expands.

The Current Entries and New Entries Sections

Note that once you’ve clicked Continue Editing Form, the Cost Distribution section is visible; divided into 2 sections:
A. Current Entries

This section displays all existing distributions as of the Effective Date you entered in Step 1.
For example: If you entered an Effective Date of 08/01/2014, any cost distributions active on 08/01/2014 would be displayed (and available for changes) within the 2nd section: New Entries
To change the Effective Date, click Change Effective Date.

B. New Entries

This section is where you add or make edits to a cost distribution, such as changing an End Date which stops a cost distribution
Continuing with the Cost Distribution section:

1. You'll find under the Current Entries section, two radio buttons: (REPLACE and INSERT). Please select the appropriate button.

- **REPLACE** is used when you want to remove existing cost distributions, from the Effective Date that you entered, continuing forward. These may be retro-active or prospective changes

- **INSERT** is used when you want to insert a change to a particular cost distribution – but only within a specific period of time that you designate

The insert option allows you to make the change, but existing distributions after that specified period of time continue forward.

4. You make changes to cost distributions in the New Entries section of the Salary Cost Distribution form. In this section, you will see the following icons:

- ![Delete](image)
  Allows you to delete a distribution: Click the Selection button for the distribution you wish to delete. The distribution is highlighted and you may click on delete.

- ![Reset](image)
  Allows you to restore the distribution settings.

- ![Check](image)
  Allows you to perform a check for formatting of entries (e.g., it will insert .00 if you entered a percentage as simply 25, so it's updated to a correct format of 25.00)

5. The salary cost distribution's Begin Date is the same as Effective Date of the cost distributions.

6. From the drop-down menu, select the Reason for Change you are making.

7. Enter the Cost Center, Order Number, and/or WBS Element, click on one of the radio buttons, Percentage or Amount and enter either the % value or the amount.

8. Enter the End Date for the individual cost distribution. If end date is invalid, it will be highlighted in red and must be changed. When using INSERT for multiple cost distributions, End Dates MUST be the same for each distribution or you'll get the error: “End dates of cost distributions need to match on Insert”.

9. Use ![Attachments](image) > ![Browse](image) > ![Attach File](image) to upload any back-up documents used for pre-approval.

10. **New Comments** - Supply additional info pertaining to the salary cost distribution to aid Workflow approval. Click on ![Continue/Review](image) button to proceed.

11. In case of multiple cost distributions, or in the case that the salary is not being charged to the Master Cost Center, an acknowledgement section will appear. Check all the options that apply in this section.

Acknowledgement Section

Additional Fields Section: Questions related to Sponsored Programs/PAFO grants

12. For retroactive changes for PAFO grant related distributions less than 90 days from the system date, you will need to answer two questions that appear in “Additional fields” section. For retroactive requests greater than 90 days, you will need to answer four questions, choose an approver from a list of Principal Investigators (PI), and (optionally) email an employee a copy of the explanations in the additional fields section.

13. Click on ![Continue/Review](image) to review the form or exit.

14. Click on ![Submit](image) to submit the form.