Salary Cost Distribution Form

When to use

Complete a Salary Cost Distribution form when an employee's cost distribution needs to change. This may include, but is not limited to, the expiration of a cost object, when a new cost object needs to be added to the current cost distribution of the employee, or when the allocation of salary charged to the cost objects needs to be adjusted.

The Salary Cost Distribution form allows you to change salary cost distributions either from the Effective Date you specify onward, or to insert a change within a specific window of time that you designate (this option does not impact other, existing distributions).

Note: Cost distributions must always total to 100%. When retroactive changes are made to grants, you will be required to provide answers/explanations to questions in the "Additional Fields" section.

Information: No OM form is required prior to the submission of this form; however, the allocation of your budget will not be adjusted without submitting an OM form.

Before you begin

You will need the following information:

- Effective date of action
- Reason for change
- Cost Distribution
- If making an adjustment to or from a grant and the change is more than 90 days retro, see the adjustment procedures on the Sponsored Programs page

Incorrect information will result in longer processing times and may cause your form to be returned or rejected.

References

- Click here for the Data Dictionary
- Click here for more information about Sponsored Program salary adjustment procedure and forms such as PAR, SARF, etc.

Salary Cost Distribution Change Form: Step-by-Step

Step	Action
1	Initiate the **Salary Cost Distribution Change** form. ***Warning:*** Forms must be completed one at a time; do not open multiple forms in multiple tabs. ***Reference:*** Initiate a Personnel Administration (PA) Form
2	Enter the effective date for the change(s) in the **Salary Cost Distribution Effective Date** field in mm/dd/yyyy format. If preferred, click the **Calendar Lookup** icon to select the effective date of hire from the calendar. ***Note:*** To see an overview of existing Cost Distributions, click on Cost Distribution Overview ***Warning:*** To avoid salary being charged incorrectly, whether to the wrong account(s) or in the wrong amount(s), take note of the assigned PA deadline for the intended pay period and plan accordingly.
3	Click the **Continue Editing Form** button. ***Result:*** The following sections of the form will appear: • **Employee Information** • **Current Entries** ***Note:*** The Current Entries displays all existing distributions as of the Effective Date entered in Step 2 and are not editable. • **New Entries** ***Information:*** This step will make the **Effective Date/Start Date** field become read only. Click the **Change Effective Date** button to change the effective date, if needed.
4	Review the cost distribution section. The Cost Distribution area is divided into two sections, Current Entries and New Entries: • The **Current Entries** section displays all existing/active salary cost distributions as of the Salary Cost Distribution Effective Date entered. • The **New Entries** section is where you can add or make edits to an existing cost distribution.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>5</td><td>In the New Entries section add or make edits to a cost distribution (i.e., Changing an End Date)

<table>
<tr><th>IF…</th><th>THEN…</th></tr>
<tr><td>REPLACE</td><td>Remove existing cost distributions, from the Effective Date that you entered, continuing forward. These may be retro-active or prospective changes.</td></tr>
<tr><td>INSERT</td><td>To insert a change to a particular cost distribution – but only within a specific period of time that you designate.</td></tr>
</table>

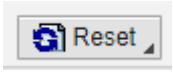
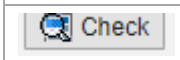
Note: When using INSERT, the End Dates of the cost distributions have to be the same. If this is not the case, you'll receive an error: "End dates of cost distributions need to match on Insert"</td></tr>
<tr><td>6</td><td>Choose how you would like to allocate what portion of funding should be charged to a cost object. Click on Percentage to specify the percentage OR amount if you prefer to specify the amount.

Note: No matter which method you choose, the other option will automatically update; for example, if you choose to allocate based on percentage, the amount will automatically update based on the percentage you enter, and vice versa.</td></tr>
<tr><td>7</td><td>Enter the Begin and End Dates and select the Reason for Change from the drop-down menu.</td></tr>
</table>

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>8</td><td>Complete the cost distribution fields in the New Entries section:

Cost Center
Information: If you don't know the cost center, click the button in the Cost Center field to search for the cost center.
Order Number, as applicable
WBS Element, as applicable
Percentage

Warning: The Total Percentage field must equal 100%.
End Date
Information: If the end date is invalid, it will be highlighted in red and must be changed. This is typically due to the end date entered on the form not matching the end date of the account to be charged.

Note: The buttons below allow you to edit input in the New Entries section:
<table>
<tr><th>Option</th><th>Description</th></tr>
<tr><td> </td><td>Delete a line of the distribution</td></tr>
<tr><td>  </td><td>Restore the distribution settings to how they initially appeared on the form prior to the changes you made</td></tr>
<tr><td>  </td><td>Perform a check for formatting of the percent time entries up to two decimal places and populate the Description field.</td></tr>
</table></td></tr>
<tr><td>9</td><td>Click the Check button to review percentages and populate the Description field. Confirm the cost distribution is correct based on the Description.</td></tr>
<tr><td>10</td><td>Upload any relevant documentation for the cost distribution change in the Attachments section of the form. Please refer to the matrix if you need assistance determining what is required for attachments.
<table>
<tr><th>IF…</th><th>THEN…</th></tr>
<tr><td>There are documents to attach</td><td>Proceed to the next step</td></tr>
<tr><td>There are no documents to attach</td><td>Proceed to Step 17</td></tr>
</table>
Warning: do not include attachments containing sensitive information such as social security number, date of birth, etc.</td></tr>
</table>

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>11</td><td>Click the Browse button in the Attachments section.

✔ Result: The Open window appears.</td></tr>
<tr><td>12</td><td>Navigate to the appropriate file on your computer.</td></tr>
<tr><td>13</td><td>Click the title of the file.</td></tr>
<tr><td>14</td><td>Click the Open button.

✔ Result: The filename appears in the Select File: field.</td></tr>
<tr><td>15</td><td>Click the Attach File button.

✔ Result: The file now appears in the Attachments table.</td></tr>
<tr><td>16</td><td>Repeat steps 11-15 for each attachment.</td></tr>
<tr><td>17</td><td>Enter additional information in the New Comments section for both future reference and to provide additional details to the approvers.</td></tr>
<tr><td>18</td><td>Click the Review button at the bottom of the page. This will check for errors on the form.

✔ Result: Error messages appear at the top of the form.</td></tr>
<tr><td>19</td><td>Review the form for accuracy.</td></tr>
<tr><td>20</td><td>
<table>
<tr><th>IF the form…</th><th>THEN…</th></tr>
<tr><td>Is accurate</td><td>Click the Submit button</td></tr>
<tr><td>Requires updates</td><td>• Click the Back button
• Make any necessary updates
• Return to step 18</td></tr>
</table>
✔ Result: The form is submitted for approval via workflow. You can track the form progress through Request Tracker. You will receive an email notification when the form is approved.

⚠ Warning: Being able to submit the form does not mean the action is error free. A crash will show in the Request Tracker with the current agent “SAP” and a status of “Correction”. If an error exists, the form will crash and HR Information Systems will receive an automatic notification (ticket). No action is required on the part of the initiator; HRIS will follow up if additional information is needed. HR Information Systems will resolve the issue as soon as possible. Payroll critical items are handled first.</td></tr>
</table>