Maintaining Distributions for Faculty & Staff
Overview of Faculty and Staff Commitments

Faculty and staff commitments (salary, compensation, and status data) come from the PeopleSoft Human Resources system, and are updated nightly. You can review and update committed distributions for employees and faculty members using the Faculty & Staff Commitment Summary page.

For faculty and staff members, the data you enter in Labor Accounting only determines which project/grants will be charged for the payments. The actual commitments come from the Payroll system, and cannot be changed in Labor Accounting. The only exception is the faculty summer salary, for which you can enter the encumbrance as well as the distribution in Labor Accounting. The summer salary must then be approved by the Office of the Dean of the Faculty before any summer salary can be paid.

Earnings Periods and Distribution Periods

All distributions of salary charges are made within distribution periods. For most staff members, the system commits regular salaries in a single earnings period that usually begins at the beginning of a fiscal year (when salary increases are given). The period then continues until a new commitment is entered. The fiscal year begins on July 1st.

For faculty, the system encumbers salary in two earnings periods. Summer salaries appear in a period that runs from July 1st through August 31st. Regular salaries appear in a period that begins with the fall term, on September 1st and ends with the end of the spring term, on June 30th. The following figure shows the default earnings periods for faculty members.

The fiscal year for bi-weekly employees changes depending on when the pay periods fall. For example, the 2004 fiscal year for bi-weekly employees began on June 9th, 2003 (because the pay date of the first pay period was July 2nd). The next fiscal year began on June 21, 2004.

Tip! An entry will be displayed in the Status area at the top of the View Comments page for any status change that results in a new earnings period.
For all employees, the system creates new salary earnings periods at the beginning of each fiscal year. If a compensation adjustment such as a promotion, or a change in status such as a leave occurs at another time of the year, the system automatically creates a new earnings period. Earnings periods are displayed in the Commitment area of the detail pages for each earnings type.

Distribution periods are displayed in the Distribution area of the detail pages for each earnings type. For permanent faculty and staff members, the default distribution period is generally shown beginning on the first day of the fiscal year and ending on 12/31/2999. You can change the default distributions as needed to reflect actual distributions or subsequent changes, and you may create new distribution periods in addition to those automatically generated by the system. If the distribution of a person’s salary changes during an existing period, you must add a new period in the Distribution area where you can then distribute the charges to different project/grants or change the amounts or percentages between project/grants.

To add a distribution period for the full fiscal year (that is, not ending on 12/31/2999), click the Add Yr End button. To add a distribution period for less than a full fiscal year, you must specify the beginning date of the period. The system assumes that the ending date for a new distribution period is the day before the beginning date for the next sequential period, or the end of the fiscal year. Periods are arranged according to date, and the new period is added in the appropriate spot.

For example, if you have a period that begins at the beginning of the fiscal year and another that begins on February 1st, and you add a distribution period beginning November 15th (keep in mind that the fiscal year begins on July 1), the November period is added before the February period, and the ending date of the newly added period will be January 31st, as shown below.

For information on changing salary distributions and distribution periods, see “Adding or Changing Project/Grant Distributions,” on page 126, or “Adding and Deleting Distribution Periods,” on page 122.
The pages used to change project/grant distributions for faculty and staff members are all available through links on the Faculty & Staff Commitment Summary page. When you click on any of the links, the selected page is displayed, with tabs across the top of the page for all the other Faculty & Staff pages. The following pages are available for maintaining distributions for Faculty & Staff Commitments:

Table 3: Faculty & Staff Pages

<table>
<thead>
<tr>
<th>Link Name</th>
<th>Page Tab Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Regular Pay</td>
<td>REG</td>
<td>Used to maintain distributions for regular salary commitments.</td>
</tr>
<tr>
<td>Summer Salary</td>
<td>Fac Summ</td>
<td>Used to enter encumbrances and maintain distributions for summer salary commitments.</td>
</tr>
<tr>
<td>Chair/Dean Override</td>
<td>Chair/Dean</td>
<td>Used to maintain distributions for department chair or dean appointments.</td>
</tr>
<tr>
<td>Chapel Housing</td>
<td>Chap Hsng</td>
<td>Used to maintain distributions for a housing allowance for the University chaplain.</td>
</tr>
<tr>
<td>Workers Compensation / Workers Compensation - Ext</td>
<td>Wk Comp</td>
<td>Used to maintain distributions for payments made from workers compensation funds.</td>
</tr>
<tr>
<td>Temporary Disability / Temporary Disability - Ext</td>
<td>Temp Dis</td>
<td>Used to maintain distributions for payments made from temporary disability funds.</td>
</tr>
<tr>
<td>VF/VRF Stipend</td>
<td>VR/F Stip</td>
<td>Used to maintain stipend distributions for Visiting Fellows and Visiting Research Fellows.</td>
</tr>
<tr>
<td>VF/VRF Salary Sup</td>
<td>VR/F Sal</td>
<td>Used to maintain salary support distributions for Visiting Fellows and Visiting Research Fellows.</td>
</tr>
<tr>
<td>Summary</td>
<td>Click this tab to return to the Faculty &amp; Staff Commitment Summary page.</td>
<td></td>
</tr>
</tbody>
</table>
The Faculty & Staff Commitment Summary Page

You use the Faculty & Staff Commitment Summary page to review and update distributions for faculty and staff commitments for salary (regular and summer), workers compensation and disability, and other forms of compensation such as chair/dean appointments, chapel housing, and stipend and salary for visiting fellows and visiting research fellows.

When the Faculty & Staff Commitment Summary page is displayed, the distributions shown on this page include any changed distributions that have not been authorized or approved. To see the distributions that are currently in effect when changes are pending, click on the In Eff button at the bottom of the page. This displays a non-editable version of the Faculty & Staff Commitment Summary page that shows the distributions currently in effect for the selected individual.

Tip! You can display comments on the changes shown on the Faculty & Staff Commitment Summary page by clicking the View Cmt button.

Displaying a Person’s Commitment Summary

To display a person’s Commitment Summary page, you must locate the person on the General Browse page, and click the Edit Summary button to display the Faculty & Staff Commitment Summary page.

Note: If you search for records using the Project Browse page, you will not see the Faculty & Staff Commitment Summary page; instead, you will see the tabbed detail pages for which you are authorized. See “Changing Project Distributions,” on page 151 for information on how to make distribution changes on the detail pages from the Project Browse.

To display a person’s commitment summary:

1. On the General Browse page, create a current view as described in “Entering Search Criteria to Create the Current View,” on page 28.

   Tip! The more search criteria you use, the smaller the resulting list will be, and the easier it will be to locate the person you want.

2. In the Personnel List on the General Browse page, use the scroll bar, if needed, to locate the person whose commitments you want to see.
3. Click the Edit Summary button on the line that contains the person’s name. The Faculty & Staff Commitment Summary page is displayed.

Alternatively, you can work your way through all the records displayed on the Personnel List of the General Browse page by clicking the Next and Prev buttons on the Faculty & Staff Commitment Summary page. This is very useful when you are using the General Browse page to display your work list.

**What’s on the Faculty & Staff Commitment Summary Page?**

The Faculty & Staff Commitment Summary page contains a summary of commitment data for one faculty or staff member. At the top left, in the yellow banner, the person’s name, emplID, and department are displayed. Under the identification area, the earnings types for commitments are listed, by fiscal year.

Depending on the default settings for your user profile (see “Changing Your User Profile,” on page 21 for information on the user profile), one or more fiscal years may be expanded to show the support and earnings types, or they may all be collapsed. Rows that are collapsed are indicated by a plus mark:

You can click on the plus mark to expand a collapsed row into multiple rows for each earnings type.

**Note:** When you click on the plus mark, the display is expanded upward to show the additional data.
To collapse the rows, click on the minus symbol at the bottom of the expanded rows.

When the fiscal years are expanded, each earnings type is a link to a page where you can specify the details about that earnings type, including adding and removing periods, and changing project/grant distributions.

The Faculty & Staff Commitment Summary page is divided into four major column groups, a yearly total column and one column each for Summer, Fall, and Spring. When the fiscal year is collapsed, only the total commitment and duty time are displayed in each column.

When a fiscal year is expanded, the commitment and duty time percent are displayed for each earnings type in each column.
Click on the links in the first column to enter distribution changes for a particular earnings type, including adding or removing a distribution period, or changing project/grant distributions.

At the bottom of the page are a series of buttons (you may need to scroll down to see them).

**Copy From**
Use to copy distribution data from the displayed person’s record.

**Copy To**
Use to paste copied data for a selected year into the displayed person’s record.

**View Cmt**
Use to display status and comments on the displayed person’s record.

**Quit Edit**
Use to return to the General Browse page without saving or submitting changes. If you have made changes, a warning will be displayed, giving you the option to continue without saving, or to return to the page and save your changes.

**Important!** Do not use the browser’s Back button to return to a previous page. This leaves the record in Edit mode, locking out all other users until either you return to the record or the system resets overnight. If the system resets the record, any changes will be lost.

**In Eff**
Use to display the distributions currently in effect for the displayed person. To return to the edit page, click the Edit button.
Save
Use to temporarily save changes without submitting them for approval. The record will be locked to other users for 24 hours. After that, your changes will be lost only if another user makes changes that interfere with your changes.

Tip! Clicking Save returns you to the browse page.

Partial
Use to approve changes only at your highest level of approval authorization. You must enter a comment explaining the changes.

Tip! It is not necessary to save changes before submitting them for approval.

Submit
Use to approve changes at all levels for which you are authorized, and submit changes for other approvals. You must enter a comment explaining the changes.

Tip! It is not necessary to save changes before submitting them for approval.

Disappr
Use to disapprove changes. You must enter a comment explaining why the changes are not approved.

Help
Use to display the help topic that introduces or explains the displayed page. This button appears on most pages. If you need more help than is provided in the help topic, click the Contents button at the top of the topic page to display the help contents.

Prev
Use to display the previous record on the Personnel List. If you have made changes, a warning will be displayed, giving you the option to continue without saving, or to return to the page and save your changes.

Next
Use to display the next record on the Personnel List. If you have made changes, a warning will be displayed, giving you the option to continue without saving, or to return to the page and save your changes.
Adding and Deleting Distribution Periods

Usually, except in the case of summer salaries for faculty, you would not add or delete an earnings period for a commitment for a faculty or staff member. However, you can add, change, or delete distribution periods for project/grant distributions. Each earnings type must have at least one distribution period, so if only one distribution period exists for an earnings type, it cannot be deleted.

Many faculty and staff encumbrances are open ended. This is indicated in the Distribution area by a Period End date of 12/31/2999. If you want to add a distribution period for the fiscal year you are updating, click the Add Yr End button. A period will be added from July through June of the following year.

If you want to add a distribution period shorter than a year, use the Add Period button.

To add distribution periods for project/grant distributions:

1. From the General Browse page, select the person you want to update by clicking the Edit button on that line. The Faculty & Staff Commitment Summary page appears.

2. Locate the earnings type that needs to be redistributed, and click on the link to open the page for that earnings type.

3. To add a distribution period for the fiscal year, click on the Add Yr End button in the Distribution area, and continue with Step 6.

   To add a shorter distribution period, click the Add Period button. The Add Period window is displayed.

   Tip! You can cancel the add by clicking on the Cancel button.

4. In the Begin Date field, type the starting date for the new time period using the format m/d/yyyy, or double click in the field to display a calendar where you can select the date.
5. Click on the Finish button (or press the Tab and then the Enter key). The page will be redisplayed with the new distribution period using the percentages from the previous period. The end date of the new period is what was the end date of the previous period, and the end date of the previous period is the day before the beginning date you entered for the new period.

6. If you know the distribution percentage to be charged to the project/grant in the new period, type the percentage of the overall commitment to be charged to the project/grant (50% is entered as 50.00) in the Distrib % field.

   If you know the dollar amount to be charged to the project/grant:

   a) Click the $ checkbox to open the Distrib Amt field for input.

   b) Type the amount to be charged to this project/grant in the Distrib Amt field.

   Note: If there are multiple project/grants, and you want to distribute the remaining commitment to a project/grant other than the default project/grant, check the Bal checkbox for the project/grant that is to receive the balance of the distributions before you click the Calculate button.

7. Click the Calculate button to calculate the remaining values for all of the project/grants.
8. When the distributions are correct, you can return to the Faculty & Staff Commitment Summary page by clicking the Summary tab, or select another earnings type by clicking on the appropriate tab.

9. When you are finished with changes for this faculty or staff member, click the Submit button on the Faculty & Staff Commitment Summary page to save your changes and submit them for approval.

If you are not ready to submit the changes for approval, click the Save button. The record will be locked to other users for 24 hours.

**To delete an existing distribution period:**

1. From the General Browse page, select the person you want to update by clicking the Edit button on that line. The Faculty & Staff Commitment Summary page appears.

2. Locate the earnings type for which a distribution period needs to be deleted, and click on the link to open the page for that earnings type.

3. In the Distribution area, click on the Del Period button. The Delete Period window is displayed.

   **Note:** If there is only one period, the Del Period button will be dimmed, since you cannot delete that period.

   **Tip!** You can cancel this action by clicking on the Cancel button.

4. In the Begin Date field, select the beginning date of the period you want to remove from the drop-down list, and click the Finish button. You are returned to the page, and the distribution period is deleted. The previous distribution period is extended to the date when the deleted period ended, and the support commitments are recalculated.

   **Note:** If the support in the remaining period(s) is distributed to the wrong project/grant(s), you will need to change the amounts allocated to each project/grant. See “Adding or Changing Project/Grant Distributions,” on page 126 for instructions.

5. When the commitments are correct, you can return to the Faculty & Staff Commitment Summary page by clicking the Summary tab, or select another earnings type by clicking on the appropriate tab.
6. When you are finished with changes for this faculty or staff member, save or submit your changes as described in “Saving and Authorizing Changes,” on page 166.
Adding or Changing Project/Grant Distributions

Project/grant distributions can be added or changed by users who are authorized for that project/grant, or by users who are authorized for any department. If the user who makes the changes is not authorized for that project/grant, the changes are submitted for approval by the owner of the project/grant.

**Important!** You will not be able to enter distributions for projects that are closed (that is, before the project open date or after the project close date). If the current date is after the project close date, you cannot enter distributions to that project, because it would require booking the changes after the close date.

While you can change existing project/grant distributions, you cannot change the project/grant numbers. If an incorrect project/grant has been charged, you must zero out the distributions charged to that project/grant, click the Clean Data button to remove the project/grant, and then add the correct project/grant and its distributions.

**Note:** The Clean Data button will not remove the default project/grant line, even if it contains only zeros.

When you add a non-default project/grant, the default project/grant is adjusted automatically, so the total commitment remains the same.

If there are multiple project/grants, you can enter a value in the line for one project/grant and check the Bal checkbox in another line to distribute the remaining commitment to that project/grant, rather than to the default project/grant.

**Note:** If you have only project/grant authorization, you will not see project/grants other than the ones for which you are authorized. See “Changing Project/Grant Distributions,” on page 154 for instructions.

If you need to add a distribution period to redistribute the charges (for example, when a project starts or closes), or if you need to remove a distribution period, see “Adding and Deleting Distribution Periods,” on page 122 for instructions.
When adding a project/grant, you can look for the project/grant number using any of the following search criteria:

- The first several digits of the project/grant number. The resulting project/grant list will include only those project/grant numbers that begin with the specified digits.
- The department number of the department that owns the project/grant. This is also the first three characters of the project/grant number, and the resulting project/grant list will be limited to project/grants in the specified department.
- Sponsored projects. If you check this box, only sponsored projects will be listed.
- Primary Investigator. All projects with the specified P.I. will be listed.
- Fund. All project/grants that use this fund code will be listed.

If you select multiple search criteria, the resulting list will include only those project/grant numbers that match all of the specified criteria.

**To add a project/grant to an existing period:**

1. From the General Browse page, select the person you want to update by clicking the **Edit Summary** button on that line. The Faculty & Staff Commitment Summary page appears, showing the selected person’s distributions.

2. Locate the earnings type that needs to be redistributed to a different project/grant, and click on the link for that earnings type.

3. On the earnings type page, click the **Add P/G** button in the Distribution area. The Find Project Grant window is displayed.
4. Enter the desired search criteria:

   **Begin**
   
   Enter the first several digits of the project/grant number. The resulting project/grant list will include only the project/grant numbers that begin with the specified digits. This is useful if you want to search for all of your 4xxx accounts, for example.

   **Dept**
   
   Enter the department number of the department that owns the project/grant. This is also the first three characters of the project/grant number, and the resulting project/grant list will be limited to project/grants in the specified department.

   If you are authorized for only one department, that department will be used as the default search criteria.

   **Sponsored Project**
   
   Click on this checkbox to list only sponsored projects (projects in the Fund 40 or 60 series).

   **P. I.**
   
   Select the primary investigator from the drop-down list. All projects with the specified P. I. will be listed. If you select ---- All ----, the list will not be filtered by P. I.

   **Fund**
   
   Select the desired fund code from the drop-down list. All project/grants that use this fund code will be listed. If you select ---- All ----, the list will not be filtered by fund code.

5. Select the desired project/grant number by scrolling through the list and clicking on the desired project/grant. Click the **Finish** button to add the new project/grant number.

Note: If the desired project/grant is not included in the list, contact the Controller’s Office.
The earnings type page is redisplayed with a new line for the new project/grant.

6. If you know the distribution percentage to be charged to the new project/grant:
   
   a) Type the percentage of the overall commitment to be charged to the project/grant (50% is entered as 50.00) in the Distrib % field.

   **Note:** If there are multiple project/grants, and you want to distribute the remaining commitment to a project/grant other than the default project/grant, check the Bal checkbox for the project/grant that is to receive the balance of the distributions.

   b) Click the Calculate button to calculate the Distrib Amt, based on the Distrib % value.

If you know the dollar amount to be charged to the new project/grant:

a) Click the $ checkbox to open the Distrib Amt field for input.

b) Type the amount to be charged to this project/grant in the Distrib Amt field.

   **Note:** If there are multiple project/grants, and you want to distribute the remaining commitment to a project/grant other than the default project/grant, check the Bal checkbox for the project/grant that is to receive the balance of the distributions before you click the Calculate button.

   c) Click the Calculate button to calculate the Distrib % values for all of the project/grants.

7. When the distributions are correct, you can return to the Faculty & Staff Commitment Summary page by clicking the Summary tab, or select another internal support type by clicking on the appropriate tab.
8. When you are finished with changes for this faculty or staff member, click the Submit button on the Faculty & Staff Commitment Summary page to save your changes and submit them for approval.

If you are not ready to submit the changes for approval, click the Save button. The record will be locked to other users for 24 hours.

**To change project/grant distributions without adding a new period:**

1. From the General Browse page, select the person you want to update by clicking the Edit Summary button on that line. The Faculty & Staff Commitment Summary page appears, showing the selected person's distributions.

2. Locate the earnings type that needs to be redistributed, and click on the link for that earnings type.

3. To change the distributions by percentage, type the distribution percentage to be charged to the project/grant (50% is entered as 50.00) in the *Distrib %* field.

To change the distributions by dollar amount:

a) Click the $ checkbox to open the *Distrib Amt* field for input.

b) Type the amount to be charged to this project/grant in the *Distrib Amt* field.

**Note:** If there are multiple project/grants, and you want to distribute the remaining commitment to a project/grant other than the default project/grant, check the *Bal* checkbox for the project/grant that is to receive the balance of the distributions.

4. Click the Calculate button to calculate the *Distrib %* values for all of the project/grants.

5. When the distributions are correct, you can return to the Faculty & Staff Commitment Summary page by clicking the Summary tab, or select another internal support type by clicking on the appropriate tab.

6. When you are finished with changes for this faculty or staff member, save or submit your changes as described in “Saving and Authorizing Changes,” on page 166.
To delete a project/grant from a distribution period:

1. From the General Browse page, select the person you want to update by clicking the Edit Summary button on that line. The Faculty & Staff Commitment Summary page appears, showing the selected person’s distributions.

2. Locate the earnings type that needs to be redistributed, and click on the link for that earnings type.

3. Type zeros in the Distrib % field for the project/grant you want to delete.

   Note: To distribute the remaining commitment to a project/grant other than the default project/grant, check the Bal checkbox for the project/grant that is to receive the balance of the distributions.

4. Click the Calculate button to zero out the remaining fields for the project/grant. The distributions will be re-allocated to the default project/grant, unless you check the Bal checkbox for another project/grant.

5. Click the Clean Data button to remove the zeroed out project/grant line.

6. When the distributions are correct, you can return to the Faculty & Staff Commitment Summary page by clicking the Summary tab, or select another internal support type by clicking on the appropriate tab.

7. When you are finished with changes for this faculty or staff member, click the Submit button on the Faculty & Staff Commitment Summary page to save your changes and submit them for approval.

   If you are not ready to submit the changes for approval, click the Save button. The record will be locked to other users for 24 hours.
Adding Faculty Summer Salaries

Faculty summer salaries can be paid at a rate of up to 2.5 ninths of the faculty member’s regular academic year base pay. Before the Office of the Dean of the Faculty will approve a summer salary, you must allocate the distributions to one or more open, valid accounts with sufficient funding to cover the charge. For a full explanation of the policies on faculty summer salaries, see the Guide for Academic Department Chairs and Managers, located under Guide to Policies, Publications, and Reports on the Office of the Dean of the Faculty web page.

**Tip!** You do not need to calculate what a ninth of the salary would be for a faculty member. The single summer month salary amount is displayed on the DOF Curr Appr line.

No summer salary will be paid until the Office of the Dean of the Faculty approves it. You can see whether the summer salary has been approved on the DOF Curr Appr line. If the summer salary has been approved, the Distrib Mths and Distrib Amt will reflect the salary that has been approved.

Approved summer salary amounts are displayed here. This summer salary has not been approved by the DOF

<table>
<thead>
<tr>
<th></th>
<th>July</th>
<th>August</th>
<th>Summer</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>100.00</td>
<td>100.00</td>
<td>200.00</td>
</tr>
<tr>
<td>DOF Curr Appr</td>
<td>100.00</td>
<td>100.00</td>
<td>200.00</td>
</tr>
</tbody>
</table>

The single month salary amount is displayed here

The Office of the Dean of the Faculty requires all faculty who receive summer pay to certify their time and effort on the project/grants to be charged. If you have department authorization, you can print the Certification of Effort form with the summer salary distributions from the Fac Summ page. Have the faculty member and the department chair sign the form, and keep the completed form as a record in case it is needed later for a project audit.
If a project cannot pay the full salary for the required amount of time, an offset is temporarily created. If your department cannot cover the offset from another project, you can decrease the amount paid by clicking the zero offset button. You cannot approve an amount over what will be paid by the project unless the department is providing the additional funds.

**Important!** A person with project authorization may submit a summer salary with an offset, which must be re-distributed to another project and then approved by the department. If you have department authorization, you cannot submit a summer salary with an offset.

If you add a summer salary from the Project Browse detail pages and you have department-level authorization, you must save the changes, and then reopen the record from the General Browse page to submit the changes.

**To add summer salaries for faculty members:**

1. From the General Browse page, select the faculty member you want to update by clicking the Edit Summary button on that line. The Faculty & Staff Commitment Summary page appears, showing the selected person's distributions.

2. Click on the Summer Salary link to display the Faculty Summer Salary Distribution page. If no summer salary has been previously entered for this faculty member, there will be two distribution periods, one for the month of July and one for August.

3. Click the Add P/G button to display the Find Project Grant window.

4. Locate the project/grant number using the search fields on the Find Project/Grant window. (If you need instructions on using the Find Project/Grant window, see “Using the Find Project/Grant Window,” on page 172.)
5. Click the Finish button to add the project/grant. The Distrib Mths field will be opened for input.

**Note:** If the project/grant you selected is for a project that will be closed at any point during the distribution period, another period will be added automatically beginning on the day after the project is closed. The P/G Name will begin with the word Closed - for that period, and you will not be able to enter any amounts on that line. However, you will be able to enter amounts for the period when the project is open.

6. If more than one project/grant will be charged for the summer salary, repeat Step 3 through Step 5, as needed.

7. If you know the number of months work to be charged to the project/grant, enter the number of summer months to be charged in each month to the new project/grant in the Distrib Mths field in each period, and continue with Step 8. The maximum total number of months for which a faculty member can be paid a summer salary is 2.5.

**Note:** One month in the Distrib Mths field equals one ninth of the regular faculty salary.

**Tip!** If you are entering partial month values, you will need to include five decimal positions to ensure that calculations will total correctly.

If you know the dollar amount to be charged to the project/grant:

a) Click the $ checkbox to open the Distrib Amt field for input.

b) Type the amount to be charged to this project/grant in the Distrib Amt field.

**Note:** If summer salary is to be paid in both July and August, it is preferred that you split the payments evenly over the two months, unless an account is closed in one of the months, or another reason prevents even payment.

**Tip!** If you have a complex distribution set, it is recommended that you calculate the amounts offline, and enter the dollar amounts and click the Calculate button to derive the month values. Otherwise, rounding could cause discrepancies in the penny amounts displayed, although this will not affect the bottom line charges to projects.
8. Click the Calculate button to calculate the remaining values, based on the values you entered.

   **Tip!** If you have project/grants listed that are not used, click the Clean Data button to remove them.

   **Note:** If you have corrected an offset, you must click the Zero Offset button to remove the offset funding. Otherwise, you will not be able to save the record.

9. If the project/grant(s) are the same in both periods, and will be charged the same number of months in each period, click the Jul-->Aug button to copy the July entries to August, and combine the two months.

   **Tip!** If you need to split the periods apart again, click the Split button. The period will be divided into the two summer months.

10. Display and print the certification form:

    a) Click the Cert Form button to display the Faculty Summer Salary Certification of Effort Form.

    b) From the menu, select File, and then Print to print the form.

    c) Have the faculty member and department chair sign the form, and save it for your records in case of a project audit.

    d) Click the Close button to close the window and return to the Fac Summ page.

11. When you have made all the changes you need to make on this page, you can return to the Faculty & Staff Commitment Summary page by clicking the Summary tab, or select another earnings type by clicking on the appropriate tab.
12. When you are finished with changes for this faculty member, click the Submit button on the Faculty & Staff Commitment Summary page to save your changes and submit them for approval.

**Note:** Fund 10 or 20 may only be used for up to 2 months of salary. If you attempt to enter more than 2 months on a Fund 10 or 20 project/grant, an error will occur, and the record will not be saved until you reduce the Fund 10 or 20 distribution.

A warning message is always displayed for the use of Fund 10 or 20 project/grants for summer salary. If you have questions about the use of these funds, contact the Office of the Dean of the Faculty.

If you are not ready to submit the changes for approval, click the Save button. The record will be locked to other users for 24 hours.

**Note:** If you add a summer salary from the Project Browse detail pages but you have department-level authorization, you must save the changes, and then reopen the record from the General Browse page to submit the changes.

When the Summary page is redisplayed, the **Pend Code** column indicates what type of approval, if any, is still required. For an explanation of the Pending Status codes, see Step 2, on page 29, or see the *Entering Summer Distributions* quick reference card.

**Important!** No summer salary will be paid until the Office of the Dean of the Faculty approves it. In addition, if HR does not have an I-9 on file for the faculty member by the begin date of the summer pay period, he or she will not be paid.

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**To redistribute approved summer salary amounts:**

1. From the General Browse page, select the faculty member you want to update by clicking the Edit Summary button on that line. The Faculty & Staff Commitment Summary page appears, showing the selected person's distributions.

2. Click on the **Summer Salary** link to display the Faculty Summer Salary Distribution page.
3. To add a new project/grant, click the Add P/G button to display the Find Project Grant window. For instructions on using the Find Project Grant window to locate and select a project/grant, see “Using the Find Project/Grant Window,” on page 172.

4. To redistribute an amount from one project grant to another displayed project/grant:
   a) On the line for the project/grant whose encumbrance should be changed, enter the new amount, either by entering the Distrib Mths value or by clicking the $ checkbox and entering the reduced Distrib Amt.
   b) On the line for the project/grant that will receive the balance of the encumbrance, click the MTA (Match to Approved) checkbox. This will adjust this project/grant to the remaining approved summer salary encumbrance.
   c) Click the Calculate button. The total will still match the DOF Curr Appr line, but the amounts will be redistributed across the project/grants.

5. Display and print the certification form:
   a) Click the Cert Form button to display the Faculty Summer Salary Certification of Effort Form.
   b) From the menu, select File, and then Print to print the form.
   c) Have the faculty member and department chair sign the form, and save it for your records in case of a project audit.
   d) Click the Close button to close the window and return to the Fac Summ page.

6. When you have made all the changes you need to make on this page, you can return to the Faculty & Staff Commitment Summary page by clicking the Summary tab, or select another earnings type by clicking on the appropriate tab.

7. When you are finished with changes for this faculty member, click the Submit button on the Faculty & Staff Commitment Summary page to save your changes and submit them for approval.
Tip! After the total summer salary amount has been approved by the Office of the Dean of the Faculty, redistributing the encumbrances without changing the total does not require central office approval. However, changing the total summer salary will require central office approval.

If you are not ready to submit the changes for approval, click the Save button. The record will be locked to other users for 24 hours.
You can copy distributions from one faculty or staff member to another. Copying distributions is a two-step process, like a Windows copy and paste:

- First, you copy from the Faculty & Staff Commitment Summary page for the person with the distributions you want. All the distributions on the page are copied, even if they are not expanded.
- Then you copy those distributions to the person who requires the same distributions, specifying which year’s distributions to copy. If you are copying from a record with pending changes, you may specify whether you want to copy the distributions currently in effect, or the pending changes.

**To copy distributions:**

1. From the General Browse page, select the person you want to copy from by clicking the Edit Summary button on that line. The Faculty & Staff Commitment Summary page appears, showing the selected person's distributions.

2. If necessary, make any changes that are required for both people on the appropriate earnings type page for this person.

3. Click the Copy From button. When the message **Copy From has been set up successfully** appears, click the OK button to continue. All distributions for the selected person have been copied.

4. Return to the Personnel list on the General Browse page by clicking the Save or Submit button if you have made changes, or the Quit Edit button if you have made no changes.

5. Select the person who should have the same distributions by clicking the Edit Summary button on the line for that person. The Faculty & Staff Commitment Summary page appears, showing the selected person's distributions.

6. Click the Copy To button. The Copy To window is displayed.

7. Verify that you are copying the information from the person you copied from in Step 3.
8. Select the academic year of the distributions you want to copy, by clicking on the radio button before the year.

9. If you are copying from a record with pending changes, select the distributions you want to copy by clicking on the radio button.

   - **In Effect** to copy the distributions currently in effect
   - **Pending** to copy the distributions that are pending approval

10. Click the Finish button to copy the distributions.

11. If there are some differences in the distributions, make the necessary changes on the appropriate earnings type page.

12. When you are finished with changes for this person, save or submit the changes, as described in “Saving and Authorizing Changes,” on page 166.