

## Initiator Instructions

Follow these steps to *initiate* an online Payroll Distribution Change (PDC) Form:

1. Login to your **myNEU** account
2. Click on **Services and Links**
3. Click on **Payroll Distribution Change Form** under the HRM **Benefits & Service** box
4. Enter the **NUID** for the employee whose Payroll distribution is changing
5. Hit the tab key and **Last Name**, and **First Name** will automatically populate
6. Tab to enter the correct **Position Number** for the employee. **Title** will auto-populate for you to validate you have the correct position number.
7. Tab to enter the **From Date** and **Thru Date** for the period changing payroll distribution. There are rules embedded to ensure you enter in the appropriate dates based on the Employee Class of the employee. See the [Frequently Asked Questions](#) of this document for more instructions.
8. Enter the “From” **Index, Account, and Percent** for the employee’s existing payroll distribution
9. Enter the “To” **Index, Account, and Percent** for the Index(es) to be charged, if known. If not known, Approvers will have to make sure this is complete.
10. Enter any **Reason for Change**, as you deem appropriate.
11. Search for all needed Approvers by Last Name (**Search by Last Name**) and select him/her from the **Approver** list
  - a. If a Ledger 4 or 5 Index is involved, be sure to enter Fred Crompt as the ORAF Approver in the last box in Section 3.
12. Select the **Employee Signature** button in the lower left corner to provide your electronic signature\* and click OK to sign the form
13. Select the **Go** button in the lower right corner, with **Submit** listed in the dropdown next to it, to route the form to the 1<sup>st</sup> of the designated approvers
14. You will receive an email with a PDF of the submitted form for your records.

**\*NOTE:** If you have made an error BEFORE submitting the form, click on the signature button again to unlock the form. If you have made an error AFTER submitting a form, please contact those you will be routing the form to.

If you have any questions, please contact the HRM Customer Service Center (CSC) at **617.373.2230**.

### Frequently Asked Questions

#### 1. How do I know if I need to submit a Payroll Distribution Change Form (PDC)?

Every month budget administrators are expected to reconcile their budgets. This requires budget administrators to review their monthly payroll distribution for accuracy. Should an employee be charged either to the incorrect index or account a distribution change form will need to be submitted in order to make the correction. The key contact in your area should have the reports that contain the information to fill out the PDC.

#### 2. Are there times I should fill out a Payroll Distribution Change form instead of an HRM Action Form?

A Payroll Distribution Change form is submitted anytime incurred salary expenses need to be reallocated. The form is also used to reallocate future salary charges. There are only two types of employees that can't have their future expenses changed with a PDC and they are student employees charged to account #'s 61430 and 61530 and adjunct professors paid monthly through the College of Professional Studies (CPS). In order to change salary allocations going forward for students you must contact the Office of Student Employment and have the student hired into a position number that charges the correct index/account and CPS should be contacted for any adjunct employees.

#### 3. How do I know if I have the right position number?

You should be using the position referenced on the monthly payroll distribution report for which the mischarge occurred.

#### 4. How do I complete the "From" and "Thru" dates found in section 1 of the form?

If you are moving salary expenses which were mischarged for a specific time period, you should use the 1st day of pay period as the **From Date** and the last day of the pay period as the **Thru Date**. If you want the change to just continue until further notice, leave the Thru date blank and the changes will continue until another PDC is submitted. If a Thru Date is entered, after the Thru Date entered, the charges will default back to payroll distribution on the day before the "From Date". See the table below for a guide based on Pay Period

Pay Period	From Date	Thru Date
Weekly	Sunday	Saturday or Blank
Semi-monthly	1 <sup>st</sup> or 16 <sup>th</sup> of the Month	15 <sup>th</sup> , Last Day of the Month, or Blank
Monthly	1 <sup>st</sup> of the Month	Last Day of the Month
Student Employees	Sunday	Saturday, before today's date

## Approver Instructions

Follow these steps to *approve* an online Payroll Distribution Change (PDC) Form:

1. Click on **the link** in the automated email you receive requesting your approval
2. Login using your MyNEU credentials
3. Review all details of the **Payroll Distribution Change Form**, ensuring everything is correct
  - a. If missing, enter the “To” **Index, Account, and Percent** for the Index(es) to be charged, if known. If you are the last normal approver for this form, this is required before submitting the form to ORAF or HRM.
  - b. Revise any Approvers listed as needed by searching by Last Name (**Search by Last Name**) and select him/her from the **Approver** list
  - c. If a Ledger 4 or 5 Index is involved, be sure to enter Fred Crompt as the ORAF Approver in the last box in Section 3. If you are the last approver for this form, this is required before submitting the form.
4. Enter any **Comments** based on if you will be approving or rejecting, the submitted Payroll Distribution Change Form
5. Select the **Approver Signature** button in the lower left corner to provide your electronic signature and click OK to sign the form
6. To approve the form, select the **Go** button in the lower right corner, with **Submit\*** as the default position of the drop-down next to it
7. You will receive an email with a PDF of the submitted form for your records.
8. If you are the last approver, the form will be processed within 5 business days. It will be reflected in Banner the next day.

**\*NOTE:** To reject the form, select **Reject** in the drop-down. The submitting employee will receive the form and be able to make the appropriate corrections before resubmitting the form.

To delete the form, select **Cancel** in the drop-down, if the form is not valid. The form will be deleted and the employee will have to resubmit their form.

If you have made an error submitting a form that should have been rejected or cancelled, please contact Barbara Finney for help: **617.373.4771**.

If you have any questions, please contact the HRM Customer Service Center (CSC) at **617.373.2230**.

## Checking Status

Follow these steps to check status on an online Payroll Distribution Change (PDC) Form you have initiated, have approved, or are an approver for.

1. Click on the **PDC Form [Status link](#)**.
2. Login to your **myNEU** account
3. Select the Form you'd like to check Status for, based on the **Form ID, Initiator NUID, Initiator Last Name, Initiator First Name, Submitted Date, and Status**. Note that **Status** will only be a high-level format
4. Select **View Detail** to check the status of the form.
  - a. Review **Section 3: Approvals Required** to see who was designated as an approver.
  - b. Review **Section 4: Signatures** to see who has signed the PDC form and identify where the form may be held up.