Using the new Payroll Distribution Change system

The purpose of this document is to be a reference manual providing detailed information to support the process of creating, approving/rejecting, and viewing the payroll distribution change requests.

What – Included in the new version of the Payroll Distribution Change

The following improvements are implemented in the new version of the PDC system:

1. Auto populate position number for the Employee selected
2. Only valid and active indexes can be part of the request
3. Index and Account description is displayed for the account and index used in the request
4. List of reasons to select for when a request is raised
5. Enter comments to justifying if the Change From date is less than the request date
6. Allow multiple approvers for a request
7. Allow HR to mark the request as complete
8. Receive notifications on various activities in the system
9. Dashboard for requestors to view visibility on the request status
10. Reports for HR users on various parameters

How To – Steps to use the system

This section describes steps to perform various activities in the system. Let’s go through each of the activities in detail.

Logging in to the system

1. Copy and paste the https://k2forms.northeastern.edu/Runtime/Runtime/Form/PDC+-+My+Requests/ link to any of the latest browsers.

Note: The system is best compatible for use on the latest Firefox, Chrome, Edge or Safari browsers. The system is not responsive on mobile / tablet screens.

2. Log in to the system using your-username@northeastern.edu as shown in the screenshot below, and click on the Next button:
3. You will then be redirected to the Northeastern University Organizational Account sign in page, enter your credentials and click on the Sign in button.

4. Once you are logged in you will be redirected to the Home screen of the Payroll Distribution Change system.

Creating a new Payroll Distribution Change (PDC) Request

The following are the steps to use the new version of Payroll Distribution System:

1. Once logged in, click on the New PDC Request button on the Home screen.

2. In the General Information section, enter the following details:
   a. Full Name: This is the Employee name field for whom you are raising a request.
      i. Enter the last name and hit enter.
      ii. Or click on the magnifier icon to search in the Search dialog box.
      iii. The Position field will be auto filled after selecting the employee. If the employee list is populated, select the position number from the prepopulated list.
b. Change From Date: Set the date from when the change should be applied using the **Change From Date** field. If the from date selected is a past date, the requestor will have to enter a comment in the **Late Change Comment** field mandatorily.

c. Request Reason: Select the reason for creating the request using the **Request Reason** picklist. If the Other option is selected, the requestor will have to enter a comment in the **Request Reason Other** field mandatorily.

d. Change To Date: If the user selects the end date for the change using the **Change To Date** field, the requestor will have to select the change to be made after the selected to date using the **After Change To Date** field.

3. In the **Current Earnings Distribution** section, the employee's current earnings distribution is shown with Index details along with the Account (i.e. billed for the Index) and Percent amount billed.

4. In the **Change in Earnings Distribution** section, click on the **Add** button to add a new change.
   a. Select the desired Index by entering either the Index name or Index code.
   b. Select the desired Account by entering either the Account name or Account code.
   c. Enter the percent value in the Percent field.
5. Select the individual split line item and click on the edit button to edit the individual line item.
6. Select the individual split line item and click on the delete button to delete the individual line item.
7. In the Request Approvers section, click on the add button to add an approver to the list.
   a. For each of the approvers, search by entering the approver name in the Approver Name section.
   b. Select the individual approvers and click on the edit / delete buttons to edit or delete an approver.
8. Skim through the entire form and click on the Submit button in the bottom-right corner to submit the request.
9. Click on the Exit button to cancel the PDC creation process.

Approving / Rejecting the Payroll Distribution Change (PDC) Request
The following are the steps to approve / reject the PDC raised. This section is for Approvers (users who were added as approvers by the requestors) and Research Compliance, and HR team:
1. Double-click on the request in the Task List section on the Home screen to view the list of the request waiting for your approval.
2. Click on the Approve or Reject buttons in the bottom right to approve / reject the request.
3. Comments in the Approval / Rejection Comment field are mandatory when you reject a request.
4. Click on the Exit button to cancel the PDC Approval / Rejection process.

Resubmitting the Rejected Request
The following are the steps to resubmit a rejected PDC request. This section is for requestors whose request is rejected:
1. Double-click on the request in the **Task List** section on the Home screen to reedit the rejected request.

![Task List Image]

2. The requests will contain the title **Requestor Rework**, open the request to view its details and rejection comments.
3. Make changes as per the comments by the approver and resubmit the request by clicking on the **Submit** button the bottom-right corner of the screen.

**Viewing the Payroll Distribution Change (PDC) Request**

The following are the steps to view all your raised PDC requests:

1. The following section on the home screen will showcase all the requests that you have raised:

![Request List Image]

2. Single click on any of the request would showcase the approval history for the request in the **Approver History** section.

![Approver History Image]

3. Also, you could do a search by selecting any of the parameters listed in the **Quick Search** field (Request #, Requestor, On Behalf Of (Employee Name), Change From date, Change To date, Status, Late Change (Yes/No), Position Title).
4. Click on the **Export to Excel** button to export the displayed list into an Excel file.
5. Double click on any of the requests to view its details.

**Points to Remember**

1. The fields highlighted with a Red line on the left border (as shown below) are the mandatory fields.

![Mandatory Field Image]

2. All the validations on the fields are highlighted in red as shown below when you try to submit the request.
3. For various actions in the event the following person are notified:

<table>
<thead>
<tr>
<th>Email Recipient</th>
<th>Event</th>
</tr>
</thead>
<tbody>
<tr>
<td>Requestor</td>
<td>1. When a request is submitted</td>
</tr>
<tr>
<td></td>
<td>2. When the request is rejected</td>
</tr>
<tr>
<td></td>
<td>3. When the request is processed by the HR</td>
</tr>
<tr>
<td>Approver</td>
<td>1. When a request is submitted by the requestor and your name is</td>
</tr>
<tr>
<td></td>
<td>added as one of the approvers</td>
</tr>
<tr>
<td>Research Compliance</td>
<td>1. When the request is approved by the intended approvers and is</td>
</tr>
<tr>
<td></td>
<td>now awaiting Research Compliance approval.</td>
</tr>
<tr>
<td>HR</td>
<td>1. When the request is approved by the Research Compliance team</td>
</tr>
<tr>
<td></td>
<td>and is awaiting for the HR to Approve or Reject the request.</td>
</tr>
</tbody>
</table>