PAYMENT ACTIONS SYSTEM USER GUIDE

Accessing the Payment Actions System

1) Log into Payment Actions system through Portal (portal.pace.edu), or using the following link:
   https://appsrv.pace.edu/PmtActionsPROD/

2) Sign into the system using your Pace username and password.

Navigating the Payment Actions System

| **1.** **Initiate Payment Action (NEW)**: *Click here to begin the Payment Action Process.*	**2.** **Review Actions Requiring My Approval**: *Click here to review payment action requests requiring your approval.*	**3.** **Reports**: *Click here to view the status of payment actions you have initiated, approved / disapproved, or cancelled.*
4. **Manage**: *Click here to view approval steps for each payment action request reason as well as workflow.*	**5.** **Help**: *Click here to download this Guide for the Payment Action system.*	**6.** **Logout**: *Click here to logout of the system.*

PAYMENT ACTIONS SYSTEM USER GUIDE

Initiating a Payment Action

1) Click on "Initiate Payment Action (NEW)". A list of all employees in your organization will populate automatically.

2) Find an employee (or Search by Last Name in search box along the top if you are a Super user.)

3) Select the position number or payment option associated with this payment action from the dropdown menu. The list will include some or all of the following:
   a. **Employee's own position number:** *for payments/changes to their current position or salary*
   b. **Enter active position number:** *if payment action is for a new position for the employee*
   c. **Generic one-time (OP9999):** *one-time stipend payment*
   d. **Generic series payment (QP9999):** *stipend paid over more than one pay period*
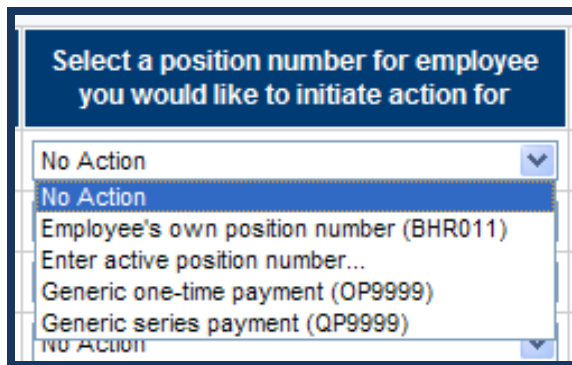
4) After selecting the position number or payment option, you will be able to click the **Submit** button below your selection.
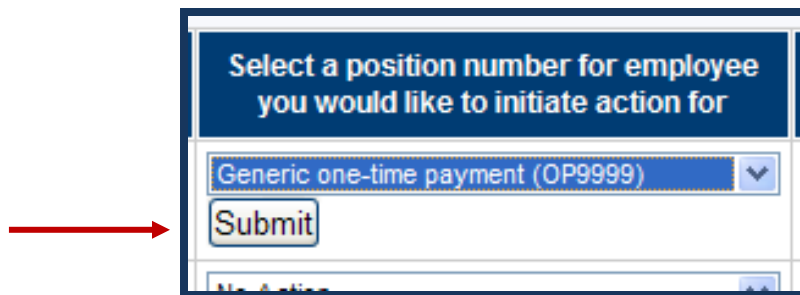

5) On the next screen you will now select the **Reason for this Payment Action**, and specify an **Effective Date**, **Number of payments**, and **Total Payment Amount**. Also, the **Description of the Reason for the Payment Action** is required, along with any other relevant notes. If you do not complete all fields, you will receive an error message.

Employee Last Name	Employee First Name	Type Selected	Position Num	Below are the payment action reasons valid for the employee class of this employee and position number you have selected	Effective Start Date	Number of Payments (enter 99 if no end date)	Total Payment Amount	Description of Reason for Action

PAYMENT ACTIONS SYSTEM USER GUIDE

6) Verify that the **Type of Position** selected and the **Position Number** are both correct before you **Continue to Next page**.

- If the information is NOT correct, go to the bottom of the screen and click **Disregard any changes made above and go back**.

| Continue to Next Page | Disregard any changes made above and go back | Cancel this Payment Action |
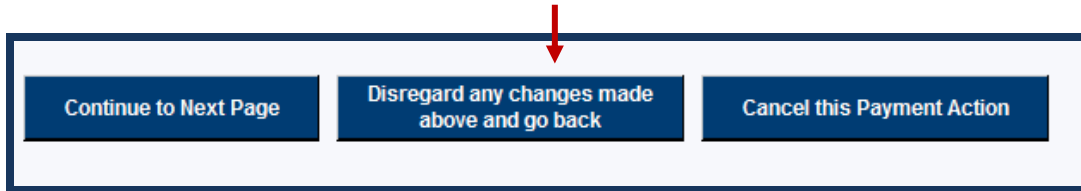
7) Select **Reason for this Payment Action**: Only reasons relevant to that employee and selected position/payment will now be displayed.

    a. Select the **Effective Start Date** from the drop down menu.

    b. Enter the **Number of Payments** that you wish to pay the employee, or enter "99" if no end date.

    c. Enter the **Total Payment Amount** that you wish to pay the employee.

        i. If the payment action is for <u>more than one pay period</u>, this is the TOTAL dollar amount that will be divided among the multiple pay periods.

        ii. If processing a <u>salary increase or hourly rate increase</u>, enter the *new* salary or *new* hourly rate the employee is to have.

    d. Enter the **Description of Reason for Action** and any other pertinent information.

8) Double check your entries and click **Continue to Next Page.** On this page, double check the information entered previously (e.g., Calendar Year, Effective Start/End Dates, Number of Payment, Total Amount, etc.).

Based on the position numbers supplied, labor distribution info has been retrieved if available.
If any fields are highlighted below in yellow, additional labor distribution information is needed, otherwise click 'Continue to Next Page'

Employee Last Name	Employee First Name	Position Num	Calendar Year	Labor Distribution Information ⊘	Effective Start Date	End Date	Number of Payments	Total Payment Amount	Reason for Action

    a. If any information is incorrect, click **Disregard any changes made above and go back**, to return to the previous screen.

    b. If necessary, enter **Labor Distribution Information** (i.e., from where the payment action will be charged.) Labor distribution information will be automatically filled in if available. If highlighted, enter the necessary labor distribution information:

PAYMENT ACTIONS SYSTEM USER GUIDE

Note: clicking on "enter distribution info" will minimize or maximize the labor distribution information section.

    i. Enter **Index number.**

    ii. Enter **Account number.** For a list of commonly used Account Codes, click the symbol next to "Account".

    iii. Check **Percent**: If the payment is to be charged to more than one budget line, divide the percentages accordingly. The total percentages must equal 100%.

9) Click **Continue to Next Page**.

    a. Check information. Also, be sure to check the Calendar Year and that the End Date is what you expected for the Number of Payments you selected on the previous screen.

    b. If additional reviewers are needed before Dean or Business Rep for approval, select number of additional approvers in the dropdown menu.

    c. If all information is correct, click **Send for Approval.**

PAYMENT ACTIONS SYSTEM USER GUIDE

Reviewing Actions Requiring My Approval

1. You will be notified via e-mail that there is an action awaiting your approval, however you may enter the system at any time to check to see if there are actions requiring your approval. When you log into the system, click on **Review Actions Requiring My Approval**, and you will see the action(s) listed.

> ***Note:***
>
> The **Export** and **Export Labor Distribution** links located at the top right of this window will populate a Microsoft Excel spreadsheet with the following information:
> - **Export** link – will provide a general export of the table below with one record per payment action recipient
> - **Export Labor Distribution** link – will provide a table of split labor distributions, each on its own row allowing for sorting/filtering
>
> These exporting features can also be found within the Reports menu.

2. Click on **View Details**.

3. You will see the details of the payment action. Review for accuracy.

4. The bottom of the screen (below the Approve/Disapprove/Cancel buttons) lists the Approval Workflow Steps for the payment action. This will show all steps in the workflow and their status.
    - Note: Clicking **View history log** will expand the section and allow you to view any previous Description/Comments entered during the approval process entered by previous approvers.

PAYMENT ACTIONS SYSTEM USER GUIDE

View history log »
(NOTE: All comments submitted during the approval process are available in the history log)

Date Logged	Log Type	Step Number	System User Name	Workflow Sent To	Comments	Respons	Notes
11/1/12 2:48PM	Initiated Payment Action	1	Anthony Cuffari			Initiated	Initiated and sent for approval
11/1/12 2:48PM	Initiator Comments	1	Anthony Cuffari				Position number will now reflect the correct area they work out of.
11/1/12 2:48PM	Workflow step assigned to	2	Christopher Elarde	CELARDE@PACE.EDU			
11/1/12 2:48PM	Workflow step assigned to	2	Lorianne O'Donnell	LODONNELL@PACE.EDU			
11/6/12 9:36AM	Approval	2	Christopher Elarde			Approved	
11/6/12 9:36AM	Workflow step assigned to	3	James Marshall	jmarshall@pace.edu			
11/6/12 9:36AM	Workflow step assigned to	3	Karen Buckwald	KBUCKWALD@PACE.EDU			

5. If you approve and want to move the payment action forward in the workflow, click on **Approve**.

6. A new screen appears confirming that your approval of the payment action for the employee has been recorded and the workflow has been advanced to the next step.

7. You may now click on **Logout** to exit the system, or continue reviewing actions requiring your approval.

   (*Note*: If you click **Disapprove** to disapprove this payment action, the workflow will go directly back to the original requestor of this payment action, step 1 of the approval process. The user who initiated the action has the ability to make changes and then send a revised action out for approval. You will be asked to provide comments before this disapproval gets submitted.)

Viewing the Status of Payment Actions

1. Click on **Reports**.
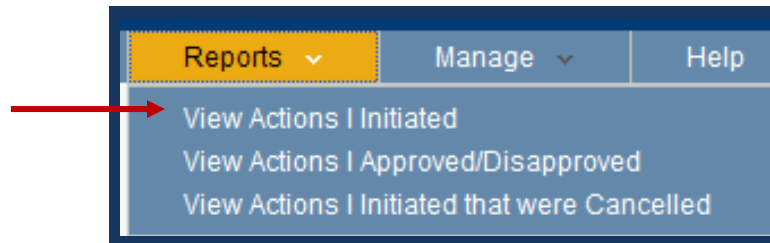
2. Depending on your Role in the workflow, you may be able to select these or more in the dropdown menu**:**

   - View Actions I Initiated
   - View Actions I Approved/Disapproved
   - View Actions I Initiated that were Cancelled

3. For example, after clicking **View Actions I Initiated**, the payment action will appear in one of two sections:

PAYMENT ACTIONS SYSTEM USER GUIDE

Actions you have initiated – not yet fully approved: These payment actions are not yet completed. This screen will also indicate the current workflow step. For example, if Compensation approved in Step 2, it would show Step 3 (the Dean/VP), meaning that the payment action is pending the Dean or VP's approval. You can also click on the **View Details** button to see the payment action and see the Approval Workflow Status near the bottom of the screen.

OR

Actions that you have initiated that have been completely approved: This will confirm that the payment action is with HRIS for processing.

Note: Along the top of the screen, you will have the ability to show and view actions by the dates they were initiated. You can click on one of the options, or manually enter in a range of dates.

PAYMENT ACTIONS SYSTEM USER GUIDE

View Approval Steps for Each Reason

1. Click on **Manage**.

2. Click on **View Approval Steps for Each Reason**.
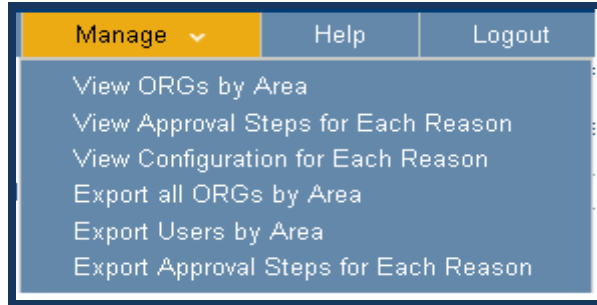
3. In the window below you will see the approval steps used for each payment action reason. Scroll through the list to see all of the different payment action reasons. (Please note that additional steps may be inserted also if the labor distribution is Endowment Funded, Grant Funded, or if split percentages are used.) You may also click on **View Approval Steps for Each Reason** to see the approval steps required for each payment action.

PAYMENT ACTIONS SYSTEM USER GUIDE

Logging Out of the Payment Actions System

1. Click the **Logout** button at the top of the screen to log out of the system.