eCompensation Overview

eCompensation (or eComp) is a function within People@Columbia (PAC) where annual merit increases are electronically submitted and approved in the departments and schools. It is also used to reappoint faculty for the 7/1 - 6/30 academic year. An electronic workflow allows for a paperless approval process.

The eComp system opens each year for several weeks in May and June for changes effective July 1, the beginning of the new fiscal year.

Access to eComp is targeted to employees at Columbia University who submit and review eComp transactions for their assigned department(s). They also work closely with the Human Resources Client Managers and Compensation team for officers of administration and with the Associate Provost for Academic Appointments for academic personnel to ensure all required steps and documentation are completed to support the process.

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eCompensation Workflow and Roles
A Workflow is the routing of transactions based on rules. Workflow is used in PAC to route transactions for approval and processing. Within each workflow, there are levels of reviewers and transactions will "stop" at each level for review and approval as needed.

There are two roles within eComp, the Submitter and the Reviewer. A Submitter enters the transaction data for their assigned department(s) into PAC and a Reviewer approves the transactions for their assigned department(s). Depending upon the department structure, there is one Submitter and up to two Reviewers. In some departments the Submitter is also the 1st Level Reviewer in a combined role that submits and approves in one step. In some departments, the roles of 1st and 2nd level Reviewers are held separately. In this format, the Submitter enters the transaction and each Reviewer approves. See the diagram on the next page for a visual of the workflow.

The Submitter Role
A Submitter enters and submits the annual merit increases into the eComp module in PAC. Only Submitters can enter compensation data. The department(s) and employee groups that can be accessed in the module are assigned by your department.

The Reviewer Role
A Reviewer confirms and approves submitted eComp data. Reviewers cannot enter data, only view and approve. The department(s) and employee groups that can be accessed in the module are assigned by your department.

Once reviewed, Reviewers can take one of the following actions:

- **Approve.** This either sends it forward in the workflow process to the next level Reviewer or completes the approval process if it is the final approval
- **Deny.** This sends transactions back to the Submitter to make changes

**Important!**
Be sure to communicate with each other during the entry and review process. The eComp tool does not provide notifications so it is important to keep in touch. For example, Submitters should let their Reviewers know that a group was submitted and Reviewers should let Submitters know when a group is approved/denied.
eCompensation Workflow
Below is a representation of the eComp workflow. This is the path eComp transactions follow when submitted.

**eComp Workflow**

Submitter \(\xrightarrow{\text{Submits}}\) 1\textsuperscript{st} Level Reviewer \(\xrightarrow{\text{Approves}}\) 2\textsuperscript{nd} Level Reviewer \(\xrightarrow{\text{Approves}}\) End

![Diagram of eComp workflow]

**Key:**
- **Submitter** = person who enters transactions
- **Reviewer** = person who approves transactions
- **Deny** = sends transactions back to the Submitter for changes

**Note:**
- In some departments a Submitter is also the 1\textsuperscript{st} Level Reviewer. In this instance, the transaction auto approves when submitted.
- In departments where there are separate 1\textsuperscript{st} and 2\textsuperscript{nd} Level Reviewer, the transaction is submitted by the Submitter and then requires approval from the 1\textsuperscript{st} and 2\textsuperscript{nd} Level Reviewers.
Accessing eCompensation

1. Navigate to the myColumbia portal @ https://my.columbia.edu
2. Log in with your UNI and Password
3. Click on the “HR Manager Resources” tab
4. Under the PAC Access section:
   - Click the “Go to PAC” link – Note, you must use multi-factor authentication (DUO) to log into PAC
5. The "eCompensation" page is located within the “Compensation” folder within the “Manager Self Service” folder

Visit the HR Website for information on HR related policies, processes and training.
Entering eCompensation Transactions – The Submitter Role

The Allocate Compensation Page

Now that we accessed the eComp module in PAC, let's review the information and options on the "Allocate Compensation" page. The "Allocate Compensation" page is located within the Compensation menu within the "Manager Self Service" menu.

This page displays the following information in columns and can be sorted by clicking on the column header.

- **Cycle Name** - the employee group within a department. The cycle groups include: Tenured Faculty, Non-Tenured Faculty, Officers of Research, Officers of the Libraries, Student Officers, Officers of Administration, and Non Union Support Staff
- **Group Name** - the department name
- **Role** - Submitter or Reviewer
- **Status** - the state an employee group is in within the process

Group Status Definitions:

- **Calculated** - the initial state. Allocations have not yet been made to any employee in the population
- **In Progress** - compensation allocation data was entered and saved but not yet submitted to the next Reviewer. Reviewers for this group will see a status of “In Progress” and can view the data. Revised values of Total Proposed and Balance have been calculated based on the proposed allocations
- **Submitted** - allocation data was submitted for review and is in the Reviewer’s queue
- **Pushed Back** - data was sent back to the Submitter to make changes
- **Confirmed** - allocations have been approved by the Reviewer(s) and are waiting to be loaded and finalized in PAC (i.e., the CUHR Compensation Team completion step)

The following actions are available on the "My Compensation Activities" section bar.

- **Personalize** - this option allows you to make changes to the order and sorting of columns
- **Find** - click here and enter text to locate an item on the list
- **Zoom** - click the icon to the right of the Find link to bring up a separate window that displays the compensation activities. Once you access a specific Cycle, this feature displays the employee data in a separate window
To access an employee group, simply click the link in the Cycle Name column.

Allocate Compensation

Select a Compensation Activity
Review and allocate compensation for your Employees.

Allocate Compensation Page - View Summary Data
Once a cycle name is selected, the department summary data and individual employee data displays. In addition to displaying the information, this page allows you to enter proposed increases and calculates the total proposed amount while providing a balance of any funded amount remaining.

Let's review the information on this page.

Organization Summary Data section
Here you will see salary and amount totals along with a Balance field that displays the remaining amount of dollars left to allocate. This data is inclusive for all parent and child departments in your purview. Where you have parent/child relationships in your department tree access, you are defaulted to the parent department. More to follow on department dependencies.

The columns of information in this section include:

- **Plan** - the type of comp plan, e.g. 20YY Merit
- **Total Eligible Employees** - employees eligible for merit increases
- **Total Eligible Salaries** - the total salary of all eligible employees listed in this group (including any indirect reports)
- **Total Funded Amount** - the amount of dollars to spend on merit increases
- **Total Proposed Amount** - the total amount of dollars spent on increases. This begins at $0 and increases as entries are made to individual employee data

- **Balance** - the balance of dollars left to spend between the Total Funded Amount (provided) and the Total Proposed Amount (entered)

Note: Where a parent/child department relationship exists, the summary includes all employees and totals. Once a child department is selected, the summary data displayed is for that child department only. To return to the Allocate Compensation Home page, click the "Return" link on the bottom left of the screen (not shown in picture below).
Processing for Multiple Departments
When processing eComp transactions for multiple departments, you must first submit Indirect Reports (child) departments before submitting the Direct Reports (parent) department.

Accessing an Indirect Department
Click on the department number link in the Department ID column in the Indirect Report section to display the department and its employees. Once a child department is selected, the department number will display on the top and the Direct Reports section will display the employees for that department. You must submit each child department prior to submitting the parent department.
Viewing Individual Employee Data

Allocate Compensation Page - View Individual Employee Data

In the Direct Reports section, you will see the list of employees included in this department group along with their current salary, job title, location, department and hire date. Remember that if you have multiple departments in your purview, the Direct Reports listed initially are for the parent department. Check the department numbers listed above the Organization Summary Data to confirm.

Important! This section may only display a portion of the employee list upon initial access. Check the number of items displayed in the Direct Reports bar to confirm. If only a portion of the complete list is appearing, click the "View All" button to view the complete list. It is important to view the complete list and allocate the Total Funded Amount amongst all employees and not only to those who appear on the initial page.

Direct Reports section

The columns of information in this section include:

- **Department** - the administrative department for the employee (scroll right to view)
- **Position Title** - the job title for the employee position
- **Name** - the employee's name. Click on the employee's name to view the individual's data including the salary history. Entries can also be made in this window. If the salary history does not automatically display, click the triangle to the left of the Salary History menu to expand the section. To return to the employee list page, click the "Return" link toward the top of the page, beneath the employee's name and job title
- **Salary Grade** – the salary grade for the position
- **Status** – indicates the action applied to the employee
- **View Notes** - allows you to add a note related to the individual employee. The icon will display with lines across the paper if a note exists. The Submitter and Reviewers can view this field
- **Current Salary** – current salary for the employee/faculty member
- **Change Amount** - the dollar amount of the proposed increase. This amount automatically calculates once either a Proposed Percent or Proposed Annual Rate is entered. You may also enter a dollar amount into this field. If a dollar amount is entered, the system will calculate the percentage of the increase and Proposed Annual Rate and display it in the Proposed Percent and Proposed Annual Rate fields, respectively
- **Proposed Percent** - the percentage of the proposed increase. This amount automatically calculates once either a Change Amount or Proposed Annual Rate is entered. You may also enter a percent increase into this field. If a percent increase is entered, the system will calculate the dollar amount of the increase and Proposed Annual Rate and display it in the Change Amount and Proposed Annual Rate fields, respectively
- **Proposed Annual Rate** - the new salary amount. This amount automatically calculates once either the Change Amount or Proposed Percent is entered. You may also enter a new proposed annual rate into this field. If a dollar amount is entered, the system will calculate the dollar amount/percentage of the increase and display it in the Change Amount/Proposed Percent fields, respectively
- **Employee ID** - the employee ID for the employee
• **Employment Record** - the job record that you are updating. Be sure to make updates to the correct job record

• **Full/Part** - the full or part-time status for the employee’s position

To return to the Allocate Compensation Home page, click the "Back to Compensation Activity" link on the bottom left of the screen or the “Allocate Compensation” link at the top middle of the screen (not shown in picture below). Note: screen print is for representation only and does not contain employee data.

Data can also be exported into Excel and saved by clicking the "download" icon on the Direct Reports menu bar. You can either open the file to view and then save, or save the worksheet first and then open the saved file to view.

**Entering Salary Changes and Status**

**Salary Changes**
For each employee listed, enter either the Proposed Percent, Change Amount, or Proposed Annual Rate. Up to two decimal points can be entered in the fields. When entering decimals into the Proposed Percent or Change Amount fields, the system will round up or down to whole dollars. For example, $1,275.75 rounds up to $1,276.00 and $1,275.25 rounds down to $1,275.00.

Once a value is entered in one field, the system calculates the other two fields as well and displays the remaining balance left to allocate.
Submitter Actions:

- **Save for Later** – click this to save entries and return to the saved information. Once an increase is entered and “Save for Later” is pressed, the status for the cycle changes to “In Progress”. This feature is helpful as it allows the page to be used as a tool to enter different comp variations and discuss the overall allocations with Reviewers prior to the final submittal. Reviewers can also view the entries once saved.

- **Discard Changes** – click this to remove any entered changes up until “Save for Later” is pressed. Once “Save for Later” is used, the system remembers those entries. To make changes simply enter a new value in the field. Please note that this button will not remove changes made to the “Status” column, so please review the “Status” column to confirm that they are correct.

- **Submit** – click this when input is complete and you are ready to send into workflow for review.

Key Points:

- Press the Tab key to easily move between fields on the page.

- When you arrive at the last employee listed and input a value, first click into another field to ensure the amount calculated and then click “Save for Later”. **DO NOT** press “Enter” to save the data as it will send you back to the home page and not save the data.
Status
The status will default to “No Increase/Reappoint” when you first click into the cycle. Once you input a salary increase, the status will automatically change to “Update”. When no increase is entered, make sure to select the appropriate status for the reason.

Specific reasons include:

- **No Increase/Reappoint** – This is the default status for all employees. Employees with this status will receive no change to their salary. Non-tenured faculty and officers of research whose salary is not updated will be reappointed at the same salary for the next fiscal year (7/1/YYYY – 6/30/YYYY)
• **Deferred/Non-reappoint** – This is for academic personnel only when no action is proposed in eComp. Any action will be submitted via PAF. For example: when non-tenured faculty and officers of research are being terminated, put on leave or changing title. Student officers who not being reappointed should have this deferred status which will lead to their automatic termination before the 7/15 payroll is run.

• **Promotion** – This is for non-academic personnel only. Employee will receive increase through PAF. Therefore, do not input any salary increases for promotions in eComp.

*Increases of 10% or more or increases that will bring employees above their grade maximums must be reviewed by CUHR through the Salary Exception Form.

**View Notes**
To enter a comment for a specific employee, click the icon in the "View Notes" column next to their name. This comment is viewable to the Reviewers and to the HR team.

**View Approval Status**
Once the transaction is submitted you can view the approval status and entered comments by clicking on the "View Approvals Monitor" on the top of the page. Notice that the action buttons are "grayed out" as the transaction has been submitted.
For departments with two users, the Submitter is also the 1st Level Reviewer and thus "self-approves" the transaction once "Submit" is pressed. When viewing this in the Approvals Monitor, it appears as needing a Level 2 Reviewer but keep in mind it is only one additional reviewer. **Note:** Screen print below for reference. You will see the current year/date in the tool.

![Approvals Monitor](image)

**Additional Status Interpretations Viewable in the Approvals Monitor:**

- Denied (Level 1) and Terminated (Level 2) = denied by the 1st Level Reviewer and the approval chain was terminated before it reached the 2nd Level Reviewer
- Self Approved or Approved (Level 1) and Denied (Level 2) = approved by the 1st Level Reviewer and denied by the 2nd Level Reviewer
Reviewing an eCompensation Transaction - The Reviewer Role

Reviewing Compensation Proposals

Now that entries were input and submitted from the "Allocate Compensation" page, the transactions are ready for review and approval.

Before accessing the "Approve Compensation Proposals" page where Reviewer actions are submitted, it is necessary to first view the detail for each Group on the "Allocate Compensation" page. The reason for this is that the "Approve Compensation Proposals" page provides only the options to take action for the group but not to view the individual details. Click the "View" button on the "Approve Compensation Proposals" page to navigate to the Allocate Compensation page.

Below is an example of the Allocate Compensation page where some groups are awaiting action from the Submitter or the Reviewer. In this example you can see a group that was submitted and is awaiting review. You can tell this by the Role = Reviewer and the Status = Submitted.

Click on the Cycle Name for a group to view the individual details. Here you will see the Change Amounts, Proposed Percentages, and Proposed Annual Rates.

Remember, you can view details for groups while they are in progress. Once a Submitter clicks the "Save for Later" button, the status changes to "In Progress" and you can review the entries before they are submitted for review. This feature is helpful as it allows the page to be used as a tool to enter different comp variations and discuss the overall allocations prior to the final submittal.

<table>
<thead>
<tr>
<th>Cycle Name</th>
<th>Group Name</th>
<th>Role</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY20XX Non Tenured F</td>
<td>A&amp;S Art History &amp; Archaeology</td>
<td>Submitter</td>
<td>In Progress</td>
</tr>
<tr>
<td>FY20XX Non Tenured F</td>
<td>A&amp;S East Asian Lang &amp; Culture</td>
<td>Submitter</td>
<td>Submitted</td>
</tr>
<tr>
<td>FY20XX Non Tenured F</td>
<td>A&amp;S English &amp; Comparative Lit</td>
<td>Submitter</td>
<td>Calculated</td>
</tr>
<tr>
<td>FY20XX Non Tenured F</td>
<td>A&amp;S French &amp; Romance Philology</td>
<td>Submitter</td>
<td>Calculated</td>
</tr>
<tr>
<td>FY20XX Non Tenured F</td>
<td>A&amp;S Germanic Languages</td>
<td>Submitter</td>
<td>Calculated</td>
</tr>
<tr>
<td>FY20XX Non Tenured F</td>
<td>A&amp;S Classics</td>
<td>Submitter</td>
<td>Submitted</td>
</tr>
<tr>
<td>FY20XX Non Tenured F</td>
<td>A&amp;S Italian</td>
<td>Submitter</td>
<td>Calculated</td>
</tr>
</tbody>
</table>
Approving Compensation

Let's review the information and options on the "Approve Compensation Proposals" page. The "Approve Compensation Proposals" page is located within the Compensation menu within the "Manager Self Service" menu.

This page displays items based on transaction status and the selection defaults to your role. The default selection for 1st Level Reviewers is Pending (Approved, Deny) and the default selection for 2nd Level reviewers is Pending (Approve, Deny, PB). You can locate items with a specific status, such as approved or deny, by selecting the option from the Transactions dropdown menu and clicking "Refresh".

To take action for a group, click the "Select" box for the group and click one of the following actions:

- **Approve**. This either sends it forward in the workflow process to the next level Reviewer or completes the approval process if it is the final approval.
- **Deny**. This sends transactions back to the Submitter to make changes.

You can take a similar action on multiple groups at the same time by selecting the groups and then selecting either "Approve" or "Deny".

The “Approval Status” link (in the far right column) displays the status and location of the transaction awaiting approval. See the "View Approval Status" lesson for a visual of the page.
*This page does not provide the detail for the group you want to review. Click the “View” button (in the View column for the group) to view the detail for a group. This will bring you to the Allocate Compensation page. There you will see the employee listing and the individual entries.

Confirming and Changing Data
Once the eComp data is approved it is no longer editable in the tool. Therefore, it is helpful to ensure that the entries and reviews are 100% complete prior to approval. If a change is needed after a group entry has been approved, a PAF must be submitted requesting that the amount input into eComp needs to be replaced and thus overriding the 7/1 action. Be sure to include this note in the Comments section of the PAF. For changes on PAFs, please indicate “SUPERSEDES eComp” in the Comments section of the PAF.

To view the PAF submittal deadlines for non-academic personnel, visit the Payroll Calendar section of the HR Website.

For academic personnel, please refer to the memo from Pearl Spiro.

To view salary data in your department(s), the Salary Planning Report is available for use during the eComp process. The report is located in the HR Data Store and is accessible from the HR Manager Resources page in the myColumbia portal. It displays "day old" data which means that a report run today will display data entered as of yesterday. It is helpful and recommended to run this report and take a final snapshot of your department(s) salaries at the end of the eComp process.