COP37—Adjustment Popup

Purpose
The purpose of the Adjustment Popups are to allow users to enter/edit/review a salary or non-salary adjustment to the Additional Cost Transfers page (see Quick Guide for COP29_Additional Cost Transfers). Sample screenshots are below:

Add Non Salary Adjustment Popup:
Screen Group
The Adjustment Popup is accessed from the Additional Cost Transfers page in the following ways:

1. User clicks the Add Button above the grid:
2. User clicks the Edit or Review button next to a selected line in the Grid:

Radio Buttons
The Adjustment Popup the user will see depends upon the radio button that is selected on the Additional Cost Transfers Page:

Non-Salary (F&A Projected): This is a radio button that the user selects in order to add a direct cost Non-Salary adjustment.

Salary Adjustment (Benefits, Insurance, TIF and F&A projected): This is a radio button that the user selects in order to add a direct cost Salary adjustment.
The popup that will appear if this radio button is selected will be the Salary Adjustment Popups:

Non-Salary Adjustment Popups

The Add Non-Salary Adjustment Popup consists of the following fields:

**Account-CC** – if COP has only 1 FAU, then this drop down will default to that FAU’s account-cost center. If COP has multiple FAUs, this drop down will default to “Select” or blank. The FAUs listed in the drop-down will only be the FAUs associated with that COP (i.e. for a Home packet with Linked Accounts, only the Home FAUs will appear).

**Sub** – This drop down will list all Non-Salary Sub codes (all sub codes except 00, 01, 02).

**Object** – If User selects a Sub code, the drop down for Object will only list Object Codes that exists for that particular Sub code. If User has not selected a Sub code, the drop-down for Object Code will be greyed out. Once a value is chosen for Sub Code, all associated Object Codes will appear.

**Sub-Object Title** – Once the user selects a sub code and an object code, the Sub-Object Title will be populated. This will be the sub-object title listed in the financial system.

**Direct Amount** – User enters Direct Cost amount for the adjustment expense in this field.

**Comment** – User enters Comments in this field.

**Automatic Calculations** – When a user clicks calculate, four lines will appear: Benefits, TIF, General Liability and Leave, with the sub heading “Additional Benefit Adjustments”.

v. 02.12.2014
**Benefits** – The sub listed for Benefits will be sub 06. Calculation will be based on a percentage of the employee’s salary and should be auto filled.

**TIF** – The sub listed for TIF will be sub 03. Calculation will be based on University’s TIF calculation rate and should be auto filled.

**General Liability** – The sub listed for General Liability will be sub 03. Calculation will be based on University’s General Liability calculation rate and should be auto filled. The 3 object codes for General Liability are 3380, 3385, 3390.

**Leave** – The sub for Leave will be sub 06. Field should be left blank for user to fill out.

**Save Changes** – Clicking this button will update the grid on the Additional Cost Transfers page to include the adjustment items entered on the adjustment popup.

**NOTE:** If a department user accessed the popup from the Edit button next to a selected expense on the grid, the data in all fields will be populated from the related grid line. From there, the User can go to any of the fields to make changes. Once the User saves changes (clicks Submit button) to the popup widow, the updates will be reflected in the grid.

The **Review Non-Salary Adjustment Popup** consists of the following additional fields:

**NOTE:** The review button will appear for EFM users only when the adjustment has not been approved yet. When EFM clicks on this button, they will be taken to the review adjustment Popup. Once EFM takes an action on the adjustment popup (Approve, Edit, or Remove) they will no longer see a Review button on this page. This cell will be blank. If EFM navigates to the adjustment popup and clicks Cancel, the Review button will still appear. If EFM adds a new adjustment transaction, PAMS will also consider this transaction to be Approved (EFM will not see a review button).

**Approve** – Once the user clicks the Approve button, they will be taken to the next adjustment To Appears transaction that needs review. If the user clicks the Approve button and this is the last transaction that needs review, the user will be taken to the adjustment page.

**Edit** – If the user clicks the Edit button, the fields for the transaction will become write-able.

**Remove** – If EFM clicks the Remove button, the user will be taken to the Remove Item warning message popup:
If the user clicks Remove in the popup, the item will be removed and the user will be taken to the next adjustment transaction that needs review. If the user clicks the Cancel button in the popup, they will be taken back to the same transaction.

Close – If the user clicks the Close button, they will be returned to the adjustments page.

Navigation – Navigation buttons will only appear for EFM users when they click the Review button:

Previous – Clicking this link will take user to the prior adjustment transaction that still needs review. This allows the user to “skip” this adjustment transaction to review the prior transaction.

Clicking the “double left arrows” will take user to the first adjustment transaction.

Next – Clicking this link will take user to the next adjustment transaction that still needs review. This allows the user to “skip” this transaction to review the next adjustment.

Clicking the “double right arrows” will take user to the last adjustment transaction.

Transactions for Review – PAMS will show the EFM user how many adjustment transactions still need review. The number of transactions shown here only applies to the page that the user navigated from.

Salary Adjustment Popups

The Add Salary Adjustment Popup consists of the following fields:
Account-CC – if COP has only 1 FAU, then this drop down will default to that FAU’s account-cost center. If COP has multiple FAUs, this drop down will default to “Select” or blank. The FAUs listed in the drop-down will only be the FAUs associated with that COP (i.e. for a Home packet with Linked Accounts, only the Home FAUs will appear).

Employee Name – This drop down will list all personnel/staff that have salary/wages on the FAU’s for that COP. User will select the employee that this adjustment applies to. If the user chooses an Employee Name, the Employee ID will be greyed out until the Employee Name is cleared.

Employee ID – If the employee name does not appear in the drop-down, users can enter the Employee ID in the box.

Direct Amount – User enters Direct Cost amount for the adjustment expense here.

Comment – User enters Comments here.

Calculate – Clicking this button will calculate the Benefits and TIF amounts for the expense adjustment.

Save Changes – Clicking this button will update the grid on the Additional Cost Transfers page to include the adjustment items entered on the adjustment popup.

NOTE: If a department user accessed the popup from the Edit button next to a selected expense on the grid, the data in all fields will be populated from the related grid line. From there, the User can go to any of the fields to make changes. Once the User saves changes (clicks Submit button) to the popup widow, the updates will be reflected in the grid.

The Review Salary Adjustment Popup consists of the following additional fields:
NOTE: The review button will appear for EFM users only when the adjustment has not been approved yet. When EFM clicks on this button, they will be taken to the review adjustment Popup. Once EFM takes an action on the adjustment popup (Approve, Edit, or Remove) they will no longer see a Review button on this page. This cell will be blank. If EFM navigates to the adjustment popup and clicks Cancel, the Review button will still appear. If EFM adds a new adjustment transaction, PAMS will also consider this transaction to be Approved (EFM will not see a review button).

Approve – Once the user clicks the Approve button, they will be taken to the next adjustment To Appears transaction that needs review. If the user clicks the Approve button and this is the last transaction that needs review, the user will be taken to the adjustment page.

Edit – If the user clicks the Edit button, the fields for the transaction will become write-able.

Remove – If EFM clicks the Remove button, the user will be taken to the Remove Item warning message popup:

If the user clicks Remove in the popup, the item will be removed and the user will be taken to the next adjustment transaction that needs review. If the user clicks the Cancel button in the popup, they will be taken back to the same transaction.

Close – If the user clicks the Close button, they will be returned to the adjustments page.

Navigation – Navigation buttons will only appear for EFM users when they click the Review button:
Previous – Clicking this link will take user to the prior adjustment transaction that still needs review. This allows the user to “skip” this adjustment transaction to review the prior transaction.

Clicking the “double left arrows” will take user to the first adjustment transaction.

Next – Clicking this link will take user to the next adjustment transaction that still needs review. This allows the user to “skip” this transaction to review the next adjustment.

Clicking the “double right arrows” will take user to the last adjustment transaction.

Transactions for Review – PAMS will show the EFM user how many adjustment transactions still need review. The number of transactions shown here only applies to the page that the user navigated from.

Report Generation
No reports can be generated from the popups.

Page Access
This popups are viewable to: EFM Director, Dept Sr fund Manager, Dept Admin, Dept Fund Manager, EFM Fund Manager and the EFM Supervisor.