ADDITIONAL COMPENSATION
FOR EHRA EMPLOYEES
Contents
Section 1 General ................................................................. 2
  1.1 Introduction ................................................................. 2
  1.2 Contacts / Questions ................................................ 2
  1.3 What is Additional Compensation? ............................. 3
  1.4 Additional Compensation Regulation .......................... 3
  1.5 Definition/Terms/Acronyms [REG 05.58.01 Section 4 & 5] ...................... 4
  1.6 Limitations ................................................................. 5
Section 2 Additional Compensation Application/Regulation Roles & Responsibilities .................. 6
  2.1 Employees ................................................................. 6
  2.2 Initiator and Approvers Access ................................. 6
Section 3 Additional Compensation Application ................................................................. 7
  3.1 Setting Up Email Notifications (Section 3.1 Video) .............. 7
  3.2 Navigating to the Additional Compensation Application (Section 3.2 Video) .................. 9
  3.3 Search Existing Additional Compensation Transaction Queue (Section 3.3 Video) ............. 9
  3.4 Earnings Codes (EC) and Time Reporting Codes (TRCs) .................. 10
  3.5 Additional Compensation Reporting ................................ 11
  3.6 Create a New Additional Compensation Request (Section 3.6 Video) ...................... 12
    3.6.1 Selecting a Course for an Instructional-based Action ............................. 17
    3.6.2 Attaching a Document .................................................. 18
    3.6.3 Print ................................................................. 19
    3.6.4 Save, Delete or Submit .................................................. 19
 ................................................................. 20
Section 4 – Approving Additional Compensation Requests ................................................. 21
  4.1 Additional Compensation Queue (My Addl Comp Pending Approvals) ..................... 21
  4.2 Approve a Request ...................................................... 22
  4.3 Push back to the Initiator (Deny) ...................................... 23
Section 1 General

1.1 Introduction

On January 14, 2014 [revised February 28, 2017], the NC State regulation *Additional Compensation Paid through the University (REG 05.58.01)* was established to combine two existing regulations, Supplemental Pay for EPA Employees (REG 05.20.14) and Summer Salary and Supplemental Pay for Nine (9) Month Faculty (REG 05.20.35). The new regulation clarifies procedures regarding additional compensation, including Faculty (9- and 12-month) and EHRA Non-Faculty Professionals, House Officers and Post Docs, as well as SHRA employees and County Operations Support Staff (COSS) as appropriate. The new regulation identifies supplements that are included in base pay and the types of compensation in addition to base pay.

The Additional Compensation Application streamlines additional assignment requests from the initiating department with approval routing to the employee’s home department, the initiating department, College and Division Business and Research Offices, and Executive Officers.

The University Human Resources office will conduct the final endorsement with automatic routing to University Payroll for payment – **eliminating Time & Labor entries**. At any time during the process of the request, a user will be able to view the request’s status, location in the workflow, and all actions taken thus far including scheduled and actual payment(s) information.

<table>
<thead>
<tr>
<th>Assignments less than 12 months &amp; Temporary Supplements:</th>
<th>Additional Comp Application</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assignments 12 months or longer:</td>
<td>PeopleAdmin Application</td>
</tr>
</tbody>
</table>

(Previous Adjustments and all Salary Supplements except Temporary Supplements)

1.2 Contacts / Questions

For questions concerning the Additional Compensation system and related resources, please contact:

**Ryan J Bernarduci (Additional Comp System Administrator)**
Phone: 919.513.7630
Email: rjbernar@ncsu.edu

**George Hibbler:**
Email: ghibble@ncsu.edu
1.3 What is Additional Compensation?

Additional Compensation are payments made through the University Payroll Office that are beyond base salary. Additional compensation is payment for effort that is clearly outside the scope of the employee’s job description – or faculty Statement of Mutual Expectations (SME) – performed outside of normal work effort or that adds extra work effort in addition to effort spent on normal job duties [REG 05.58.01 Section 1 & 2].

Additional compensation may be provided for activities beyond the established job duties that include, but are not limited to:

- Temporary additional or higher-level duties
- Conducting non-credit seminars, workshops, and training
- Teaching summer session courses or on-campus or distance education courses taught as overload assignments, and that fall outside the scope of work that is described in the faculty member’s Statement of Mutual Expectations (the effort for which comprises the faculty member’s Base Salary)
- Dual employment payments from other state agencies/universities
- Internal institutionally-funded grants or awards, such as for instructional development or non-externally-funded research/scholarly activities
- Externally-funded sponsored program payments during the summer term for nine-month faculty
- Externally-funded sponsored program payments beyond Base Salary for twelve-month faculty, and such payments during the academic year for nine-month faculty, if allowed by the funding source
- All other paid assignments, additional activities, deliverables, or duties with durations of less than one year.

1.4 Additional Compensation Regulation

This regulation applies to most additional compensation paid to NC State University EHRA faculty, Senior Academic & Administrative Officers (SAAOs), EHRA Non-Faculty Professionals, SHRA staff, and County Operations Support Staff (COSS) through the University Payroll Office. This regulation is not intended to modify existing policies or procedures that govern the general administration of University salaries nor payments for external consulting (such as External Professional Activities for Pay. [REG 05.58.01 Section 2])
ADDITIONAL COMPENSATION FOR EHRA EMPLOYEES

1.5 Definition/Terms/Acronyms [REG 05.58.01 Section 4 & 5]

1. **Time Periods**
   - **Academic Year**: The 9-month period from August 16 through May 15
   - **Summer**: The 3-month period from May 16 through August 15
   - **Fiscal Year**: The 12-month period from July 1 through June 30

All types of additional compensation paid by the University that are not included in the employee’s base salary are considered additional compensation for the purpose of calculating additional compensation maximums during the individual’s appointment period (20%) and during summer for 9-month faculty (90% per pay period and 33.33% for the entire summer).

2. **Annual Salary.** The current salary or annualized wage basis of the employee as it appears in the appointment letter/contract or subsequent notification of salary increase/decrease, not including supplements or additional compensation.

3. **Base Salary.** The current annual salary of the employee as it appears in the appointment letter or subsequent notification of salary increase/decrease; and any administrative, honor, or interim supplement that carries an anticipated duration of one full year or more.

4. **Salary Supplements.** Compensation in excess of an employee’s Annual Salary paid by NC State for increases in responsibility, extra duties, or honor recognitions.

5. **Salary Supplements counted as Base Salary:** Administrative, honor and interim supplements with an anticipated duration of 12 months or more are counted as Base Salary for purposes of this regulation. (Requested/Processed in PeopleAdmin EHRA Position Management and entered as a Job Action in PSHR)

6. **Salary Supplements not counted as Base Salary.** (Requested/Processed in Additional Compensation Application and identified and paid as an Earnings Code in PSHR)
   a. Administrative, Honor, or Interim Supplements with an anticipated duration of less than 12 months, are not counted as base salary.
   b. **Temporary Supplement.** A salary supplement for short-term additional duties that are anticipated to last no longer than 24 months.
   c. **Summer Salary.** Any earnings paid through NC State for work performed by 9-month faculty between May 16 and August 15, including Maymester instruction.
   d. **Dual Employment.** Payment to an NC State employee for services provided by the individual to another North Carolina state agency or UNC institution on a part-time or contractual basis.
   e. **Honor Supplement.** A salary supplement paid to a faculty member as a distinguished or named professor. Honor supplements are not used for EHRA non-faculty professionals, SHRA employees, post-docs, house officers, student, or temporary employees. Honor supplements are recurring payments for at least three months that may continue as long as the faculty member’s appointment to the distinguished or named professorship is in effect.
   f. **Interim Supplement.** A salary supplement paid for filling a higher-level vacant administrative or professional position on an interim basis while a search is planned and conducted, until the new hire starts. Interim supplements are not used for post-docs, house officers, students, or temporary employees. Interim supplements are recurring payments for at least three months that may not exceed three years except with Provost or Vice Chancellor (not designee) approval.
1.6 Limitations (REG 01.58.01)

All types of additional compensation paid by the University that are not included in the EHRA employee’s base salary as defined in the regulation are considered additional compensation for the purpose of calculating additional compensation maximums during the individual’s appointment period (20%) and during summer for 9-month faculty (33.33%).

- All additional compensation for full-time employees for the fiscal year (for 12-month employees) or for the academic year (for 9-month employees) may not exceed 20% of the Base Salary without advance authorization.
- Additional compensation for part-time employees taking on additional effort should be accomplished by adjusting the FTE, not to exceed 100% FTE.
- Part-time Non-Tenure-Track (NTT) Faculty who are contracted to teach on a course-by-course basis, typically for a semester or a year at a time and who assume additional duties beyond the contracted duties, should be compensated for the additional duties by either,
  - Revising the contract to reflect the additional duties, with commensurate FTE adjustment, or
  - By adding a separate entry in the HRIM System (referred to as a second “job row”), with commensurate FTE attributed.
- An increase in contracted duties and compensation, including additional compensation, for non-tenured faculty that still totals below 0.75 FTE is not considered an “overload” assignment.
- During the summer, a full-time (benefits-eligible) 9-month faculty member may be paid a total of 33.33% of his or her prior academic year’s (9-month) base salary from all sources of funds. Exceptions beyond the 33.33% summer-earnings maximum must be approved in writing in advance by the Dean (not designee); however, no exceptions may be approved beyond 33.33% for a 9-month faculty member paid in whole or part from sponsored project funds.
- The 33.33% maximum pay for summer instruction effort or other effort not paid from sponsored program funds may be paid over one, two, or three months; the full 33.33% salary for summer instruction effort or other effort not paid from sponsored program funds can only be in one month if the work is completed within that month.
- Payment and effort must be consistent with rules and procedures of NC State and the funding agency. Some funding agencies may impose more restrictive guidelines regarding summer pay; the awarding documents funding agency regulations shall govern allowable expenses. Additional approvals and rationale may be uploaded to the additional compensation request in the application.
- For more information related to summer salary from sponsored project funds for 9-month faculty, go to the Office of Contracts & Grants webpage: [http://cng.ncsu.edu/summer-salary/](http://cng.ncsu.edu/summer-salary/)
- In no case may a one-time or recurring special payment be used as a bonus to compensate an employee for meritorious service or performance, unless specifically pre-approved by the University’s Board of Trustees or Chancellor (not designee).
Section 2 Additional Compensation Application/Regulation Roles & Responsibilities

2.1 Employees

It is the employee’s responsibility, to communicate with all paying units, to ensure that his or her total effort and total payment does not exceed the allowable annual maximums. Employees who exceed the limit would be considered in violation of this regulation are subject to retroactive salary adjustments (if necessary) to bring the total within the allowable maximum(s). All faculty who will receive summer salary paid in whole or in part from sponsored project sources are required to complete summer salary training each provided by the Office of Contracts and Grants on the University’s summer salary regulations and standard operating procedures. [REG 05.58.01 Section 7 & 8.1]

2.2 Initiator and Approvers Access

<table>
<thead>
<tr>
<th>OUC Designation</th>
<th>Workflow Description</th>
<th>SAR Role</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee OUC</td>
<td>Initiator</td>
<td>Addl Comp Initiator Access</td>
</tr>
<tr>
<td>Employee OUC</td>
<td>Employee Home Department Supervisor</td>
<td>Add Comp Dept. Head Approval</td>
</tr>
<tr>
<td>Project ID OUC</td>
<td>Initiating (Paying) Department Supervisor</td>
<td>Add Comp Dept. Head Approval</td>
</tr>
<tr>
<td>Project ID OUC</td>
<td>College/Division Research Office</td>
<td>Add Comp Research Ofc Apprvr</td>
</tr>
<tr>
<td>Employee OUC</td>
<td>College/Division Business Office</td>
<td>Add Comp Business Ofc Apprvr</td>
</tr>
<tr>
<td>Employee OUC</td>
<td>Home Dean</td>
<td>Add Comp Home Dean Approval</td>
</tr>
<tr>
<td></td>
<td>Vice Chancellor/Chancellor</td>
<td>Add Comp VC/Provost Apprvr</td>
</tr>
</tbody>
</table>

Each OUC designation must have a Security Access Request (SAR) submitted by your college or division administrator to obtain access to any of the roles identified in the table above. Attending training is the preferred method of granting the SAR request. However, there could be scheduling conflicts that prevent the user from attending training. In those scenarios contact the Additional Comp System Administrator.

Training Course Name and Code: Additional Compensation Training - HR-LOD31

We understand that our executive officers may not be able to access the application and approve requests for a variety of reasons. Since the authority for these approvals are not delegable to anyone, pursuant to 05.58.01, including their administrative staff. Please contact the Additional Comp System Administrator for more information about temporary proxy access.

Department Level Representatives (Initiator): Initiates an additional compensation request in the additional compensation application. The initiator is typically assigned to the initiating department requesting to
assign and compensate an EHRA employee for the additional assignment. The initiating department will also be the department that will compensate the employee for the additional effort/work.

Department Level Representatives (Approvers): The approvers’ are assigned to the workflow at the time the transaction is submitted and routed for approval. The system identifies the appropriate approvers based on the type of payment (i.e. research, instruction, etc.), the project ID, and employee’s home OUC.

Section 3 Additional Compensation Application

3.1 Setting up Email Notifications (**Section 3.1 Video**)
Access to request new/update user accounts need to be submitted through the Security Application Request (SAR) process. The email notification preference by default is set to *disabled* for all users. Approvers should setup their email references to receive notification when a request is ready for their review. In order to change the default setting user must enable the setting by unchecking the ‘Disable’ checkbox on the Email Preferences page. The following explains how to access and search for an existing unity ID and/or add a new user. Email Preference is accessed through the NavBar navigator icon using the path below:

*Human Resources Systems->NCSU Administration->Additional Compensation->User Email Preference*

![NavBar: Navigator](image)

The following screenshots and instructions (yellow box below) explain how to setup email notifications.

The first step in the yellow box below refers to clicking on the “User Email Preference” above.

The second step requires the user to search for their unity ID. If the unity ID is not found click the tab to “Add a New Value”.
1. Click on User Email Preference
2. Search for your unity ID
3. If “no matching values were found” click on Add a New Value tab
4. Enter your User ID (unity ID) and click Add
5. Click the magnifying glass and select NCAddPay
6. Remove or toggle the Disable Email button to enable/disable email notifications from this application
7. Click Save

Remember to save the data once the email notifications have been enabled and/or turned on.
3.2 Navigating to the Additional Compensation Application (Section 3.2 Video)
Once you log into My Pack Portal the following identifies the (Navbar) navigation path.

1. Human Resources Systems->NCSU Administration->Additional Compensation->Additional Comp Request

Note: Once you land on the page, you can add this navigation to your “My Favorites” if you frequently use this application.

3.3 Search Existing Additional Compensation Transaction Queue (Section 3.3 Video)
The “Find Existing Value” tab allows the user to search for exiting transactions by the” Transaction ID and/or 9-digit Employee ID.” The Period field is an optional search field. It would show all distinct values for fiscal or calendar (summer) period for the employee in the drop down. If not selected, then all data will be provided. Simply update the appropriate field and click search. If the system locates a match it will display the data in the results field at the bottom of the page.

If the search criteria does not display any results, specifically using the employee ID, a new transaction can be generated by selecting the “Add a new value” tab.
The following example reflects an Employee ID search with several additional comp transactions.

The columns in the results section reflect the following:

- **Transaction ID** – system generated number for tracking purposes
- **Work Begin and End** – indicates when the additional work is being performed
- **Type** – indicates the earnings code used by payroll
- **Description** – provides a description of the earnings code
- **Department/Description** – the department planning to pay the additional payment request
- **Amount** – payment amount
- **Cumulative %** - indicates the cumulative percentage of all transactions for a specific employee being processed
- **In/Out Contract** – work being performed is in or out of contract obligation period
- **Period** – fiscal or calendar year
- **Status** – indicates the current status of the transaction  
  o **In Workflow** - indicates the request is currently in workflow awaiting review/approval  
  o **Paid** – indicates the transaction amount has been processed and paid  
  o **Pending Payment** – the transaction has been approved and awaiting payroll processing  
  o **Terminated** – the transaction has been removed from the payroll process queue by UHR
- **Created By** - the unity ID of the person who created the transaction
- **Created Date-time** - the date the transaction ID was generated

### 3.4 Earnings Codes (EC) and Time Reporting Codes (TRCs)
Additional compensation utilizes Earnings Code (EC) and Time Reporting Codes (TRC) to distinguish the type of work being performed. When initiating a new request it is very important to select the appropriate EC and TRC from the selection options. The following link will assist the user in selecting the appropriate ECs and TRCs available.

**Earnings and Time Reporting Codes website**
3.5 Additional Compensation Reporting

Canned reports are provided for easier tracking and reporting of additional assignments and payments. Report information is provided per the user’s access. From My Pack Portal utilize the following (NavBar) navigation path to access reports.

_Human Resources Systems->NCSU Administration->Additional Compensation->Additional Compensation Rpts_

Once the page opens, select the type of report to generate from the options below. The application will generate an excel spreadsheet allowing the user to identify specifics regarding the report selected. The following information covers the viewing and sorting options.

**Viewing and Sorting Additional Compensation Reports:**

- After clicking the button to generate a report, depending upon the report selected, you will be prompted to enter either the work begin date, employee ID or semester term.
- After the spreadsheet opens, click on the box on the upper left hand corner of the spreadsheet to select the entire spreadsheet.
- Double click on the line to the right next to the ‘A’ to set all the columns to the correct width.
- Right click anywhere on the Spreadsheet and choose Format Cells.
- Choose the second tab (Alignment) and click the Merge Cells so that it is no longer checked. Click OK.
ADDITIONAL COMPENSATION FOR EHRA EMPLOYEES

Example: Active Queue Report selected, the user would select the “Work Begin Date”.

3.6 Create a New Additional Compensation Request (Section 3.6 Video)
From MyPack Portal utilize the following (NavBar) navigation path to generate a new request.

*Human Resources Systems->NCSU Administration->Additional Compensation->Additional Comp Request*

To start a new additional comp transaction click on the “Add a new Value” tab.

The following provides a brief description of the field data needed before submitting a transaction:
- **Empl ID** – 9 digit employee ID of the active EHRA employee currently at 0.75 FTE or greater
- **Employee Rec#** - employees have different record #’s if they have multiple jobs on campus and the system will default to the first active record. If the default record # is not correct, the user must select the appropriate active record # associated with the work being performed.
• **Requesting Dept.** - Department requesting to borrow and compensate the EHRA employee for an additional assignment.

• **Work Begin and End Date** – indicates when the additional work assignment is being performed. *Note: work dates follow regulation-prescribed dates for summer and academic year periods for 9-month employees.*

• **Total Amount** – Enter the total compensation amount for the assignment.

• **Earnings Code/TRC/Description** – Choose the appropriate earnings code, corresponding Time Reporting Code and Description of services being performed for additional compensation.

• When you have completed your entries, click **Add** to initiate the transaction.

Once the transaction is initiated, current information about the employee ID and job record selected will be displayed in the blue section. (i.e. employee name, current salary, FTE, etc…). Employee status (Active, Leave without Pay, Paid Leave), and the latest job is also displayed in the lower left corner. If the correct employee is chosen, proceed to the center section and continue.

The highlighted **red section** allows the user to review the initial data and make any final adjustments to the work period dates, Earnings Code/TRC or the total amount being paid before saving and/or submitting the transaction.

• If the total payment amount is adjusted on this page, the original amount requested will be reflected in the “Original Total” field.

• Percent %: Percent of the request compared to the current salary in the header for this payment.
  - For the purpose of a summer research pay (i.e. Earnings codes 601 & 602) this field does not provide guidance in calculating or determining effort.

• Cumulative Percent: includes all additional payments as a percentage of current salary.
The percentage sum amounts from all payments include: Approved, Paid, Pending Payment, Initial and In Workflow status.

The cumulative percentage calculation for summer salary:
- Full-Time 9-month faculty is based upon the regulation: During the summer, a full-time (benefits-eligible) 9-month faculty member may be paid a total of 33.33% (based on 1.0 FTE equivalent) of their current academic year’s (9-month) base salary from all sources of funds.

- Period: CY=Calendar Year (1/1 – 12/31) and FY=Fiscal (academic) Year (8/16 – 5/15)
  - FY - indicates the work dates are within the appointment period for 9-month employees
  - CY - indicates the work dates are outside the appointment period for 9-month employees
    - Additional compensation during the FY exceeding 20% beyond EHRA employee current salary appointment period requires the Home Dean/VC approval.
    - Additional compensation during the CY exceeding 33.33% beyond EHRA 9-month employees current salary (5/16 – 8/15), may be approved in whole or in part from sponsored project funds.

- In/Out Contract:
  - EHRA 12-month appointments are always “In.”
  - EHRA 9-month appointments, can be “In or Out”, dependent on work assignment dates.

The highlighted green section allows the user to identify the payment amount each payable date (use drop down arrow to select) and the project ID. If the work assignment continues across multiple payable dates the user can click the plus sign (+) to disseminate the total payment amount across multiple pay periods. The application is coded with additional compensation value thresholds, as per the Additional Compensation Regulation.
The **Alternate Work Schedule (AWS)** section (blue arrows) is used if the additional work assignment interferes with the person's regular work assignment/hours. In the comment section, indicate when the regular job duties will be performed or attach the AWS.

- **For 12 month leave-earning employees:**
  - Employees working during normal hours may not also claim paid leave any time on such additional compensated assignment, but employees can request leave without pay with an alternate work schedule and supervisor's approval forwarded to Human Resources for entry into the employee's official personnel file to avoid double payment. [REG 05.58.1, Section 6.5](#). The Additional Compensation Application accommodates the requirement of documenting and approval of the schedule. If the Home Department Head is not direct supervisor, ensure that the supervisor approval is attached and uploaded to the request.
  
- If the employee chooses to take leave without pay to conduct the additional assignment, contact your college/division business office for guidance to process the employee's reduction in salary and FTE, as well as the additional job action for the additional assignment through the PSHR system.
  
- If the assignment will be conducted during their normal work hours, then an Alternative Work Schedule may be required. Toggle the Check Box and describe the alternative work schedule. For example, if an employee teaches a course where the course is scheduled from 4:00 pm to 6:00 pm (assuming the employee's normal work day is 8:00 am to 5:00 pm) Monday and Wednesdays for the fall semester, an alternative schedule is arranged to accommodate the two (2) hours the employee must make up each week for the fall period. Remember to include the time it takes for
the employee to get from work to the class/assignment (in this case, 30 minutes for travel time and setup). Outline the revised work schedule to accommodate the two hours or more the employee is not conducting their primary duties in the box or annotate that the alternative work schedule is attached and upload the document.

- If the assignment will be conducted outside of their normal work hours, then do not toggle the Check Box. Annotate in the AWS Details that the work will be conducted outside of normal working hours.

The **Description of Activities to be Performed** section needs to provide a clear effort of work being performed associated with the additional compensation earnings code. In this example the 601- EC/TRC is a research work effort assignment.

To help determine where the payment percentage lands for the month, the user can click the “SAVE” button at the bottom. Once the data is saved the user can click the “Summer Payments” option highlighted with the red arrow.

Once the “Summer Payments” page opens it indicates the payment amount and percentage to date. If the percentage exceeds 90% per/month it will automatically require dean level approval. If the payment percentage per/month is 90% or less, dean level approval will not be included in the workflow process.

Click “OK” to return to the additional payment details (red section).
If payments are scheduled over different pay periods the individual percentage amounts being paid will be reflected each month. The application provides full flexibility allowing the user to change the “Total Amount” which changes the percentage on this page, once the user clicks the “Save” button. The original amount will continue to be displayed.

3.6.1 Selecting a Course for an Instructional-based Action

If you are processing an additional compensation request for teaching overload and have selected earnings code 610 - Overload-Instructional 12-months, 615-Instructional-Overload 9-months, 650 – Summer EHRA Instruction (651 – Sum 1, 652 – Sum 2, or 653 – Sum 10 Wk), 655 – Maymester Instruction, or 995 – Overload-DELTA/Engr On-Line, then you will need to enter in the course/section information in the application. The application will not allow you to submit the request without this information and will give you the following error message if you attempt to submit the request without the course/section information, “Course Validation. Please enter course information.”
ADDITIONAL COMPENSATION FOR EHRA EMPLOYEES

5. Credit hours Min and Max – The min/max defines the credit hours of each course. Some courses have variable credit hours
6. Click the OK button to save the data to the work record
7. Cancel Button: Back out without storing any information

Note: Summer 1 and Summer 10 Week (including Maymester) courses are listed in the Summer 1 Term

3.6.2 Attaching a Document
Supporting documentation and files may be uploaded and attached to an additional compensation request. For example, an Alternative Work Schedule, a Principal Investigator’s (PI) approval or an Executive Officer’s approval of the request may be uploaded. More than one attachment may be uploaded at each stage of the request, commencing with the Initiator and at each approval level. Attachments may be in any format, such as PDF, Microsoft Word or Excel, and Text.

1. Ensure the file name is not too long or you will receive an error message.
2. Click on the “Attach,” button, click “Choose File,” find and select your file to be uploaded and the click “Upload.” You may click “Cancel” if you wish to cancel the upload.
3. If you have more than one attachment, click the +sign and continue.
3.6.3 Print
You may print the request at any point in the submission or approval process. Simply click on the Print button at the bottom of the page and a PDF file will open in another browser window for you to view, save and/or print. Remember to allow for pop-ups, otherwise the print function will not work.

3.6.4 Save, Delete or Submit
Now that you have completed your request, you have several options:

1. **Save**: You may save your request and submit at a later date/time for editing and obtaining additional information.
2. **Back**: Will return the user to the “Find Existing Value” page
3. **Delete**: This button is available for new transactions in ‘Initial’ status only. Use of this button changes the status to “Deleted.” These transaction will not show in the list generated by the search page and will not be included in any % calculations. *(Initiator Only)*
4. **Submit**:
   a. The application will re-check the amounts and percentages upon each save and submit. If the employee is a 9-month employee and the cumulative % in the summer period is > 33.33%, with ANY of the projects that make up this 33.33% starting with a ‘5,’ *(project/accounts starting with 5= grant funding)* then you will not be able to submit the request and you will receive the following **Error Message**: “This employee has been paid by a Grant for this period. Amounts over 33.33% are not allowed.” At this point, you should revise the request and resubmit or delete the request.
b. If all re-checks are positive, then the workflow should appear at the bottom of the screen. You may click on the workflow approver boxes to determine those approvers who will be sent an automated email notification of your request. You should also receive an email, as the Initiator, that your request has been submitted for review and approval.

Termination Process: This option is only available to the original initiator if the transaction has been pushed back at every stage in the workflow and reaches the initiator. EHRA Administration (UHR) can also change the status of the transaction to “Terminated” if the transaction has been approved at all stages in the workflow. This typically doesn’t happen unless something has changed from the original request and the approved amount should not be processed for payment.

These transactions will not be included in any % calculations. When the originator of the transaction clicks “Terminate Process,” the application will ask, “Are you sure you want to Terminate this Transaction.” Click ‘OK’ to continue or Cancel.

Once the page opens, select the type of report to generate from the options below. The application will generate an excel spreadsheet allowing the user to identify specifics regarding the report selected. The following information covers the viewing and sorting options.

Viewing and Sorting Additional Compensation Reports:

- After clicking the button to generate a report, depending upon the report selected, you will be prompted to enter either the work begin date, employee ID or semester term.
- After the spreadsheet opens, click on the box on the upper left hand corner of the spreadsheet to select the entire spreadsheet.
- Double click on the line to the right next to the ‘A’ to set all the columns to the correct width.
- Right click anywhere on the Spreadsheet and choose Format Cells.
- Choose the second tab (Alignment) and click the Merge Cells so that it is no longer checked. Click OK.
Section 4 – Approving Additional Compensation Requests

Department Heads, College/Division Research and Business Offices, and Executive Officers, may receive email notification of requests ready for their review if notifications have been setup, (reference section 3.1 for details). The following reflects specific information involving additional compensation approvers.

- Approvers are established at the time a transaction is submitted and routed for approval
  - Established by the project ID and employee’s home OUC/Dept.
- Each role/level may be assigned multiple approvers.
  - However, only one approval is allowed per level.

NOTE: Approvers who initiate additional compensation requests may not approve their own request.

4.1 Additional Compensation Queue *(My Addl Comp Pending Approvals)*

Only approvers can access the Approver Page. Once you log into MyPack Portal the following identifies the (NavBar) navigation path. Clicking on the option allows the user to see any pending transactions. If this option below does not open then you may not be setup as an approver.

*Human Resources Systems->NCSU Administration->Additional Compensation->My Addl Comp Pending Approvals*

Once the page opens, the user would see all reviewable transactions, managed and/or approved. If no transaction exist then nothing is in the queue.
4.2 Approve a Request

Once the list of transactions appears you have filtering options at the top of the page to help narrow down the search on specific field items if necessary. The approver can also click on the column headers to view transactions based on the column selected. Each time the approver clicks a column header the system sorts the order. To open and review a transaction simply click on the Transaction ID in the first column.

- Once a transaction opens the approver should review the request to determine if the additional compensation meets all compliance requirements including cumulative percentage and payments.
  - If the approver is satisfied the request meets all compliance requirements then click the **Approve** button (below) at the bottom of the screen.

Approval Stage

- Providing comments is optional, but required if the transaction is pushed back to the initiator.
- To upload attachments or supporting documentation, locate and select the document to be updated and click on the **Attach** button.
- Home Dean / VC Level:
  - Employee’s home Dean or Vice Chancellor
  - College/Division Business Officers, if authorized, may approve at this level with the home Dean /VC’s offline approval of the request attached. EHRA Administration will not endorse the request without the attached approval.
The additional compensation application determines the workflow of approvals. If email notifications are enabled, the system will notify the designated approvers at each step of the process. In the example below, the Home Department Head initiated the request so they are skipped from the approval process. Upon the Home Department Head designee’s approval, the next level of approval is the College/Division Research Office as this particular request is for a 9 month faculty member for summer salary funded on a sponsored research project. The Home Dean/VC approval is identified in the workflow as this request cumulatively places the employee’s summer effort, funded from all research projects during the summer period, beyond the 90% effort limitation.

You may print the request at any point in the submission or approval process. Simply click on the Print button and a PDF file will open in another browser window for you to view, save and/or print. Allow for pop ups – otherwise the print function will not work.

4.3 Push back to the Initiator (Deny)

If a transaction request does not meet compliance requirements, the approver at any stage in the workflow can push back (Deny) the request. Before pushing back a transaction a reason must be provided in the comment box. Once the comment is added, click the Push back to Initiator button at the bottom.

Pushed Back (Denied) Transactions

- The initiator receives an email when a request has been pushed back with a link to the transaction
- The following reflect the initiator options:
  - Review the transaction and update any editable fields
  - If the transaction is updated, resubmit back through the workflow/approval process
  - Terminate the transaction if it does not meet compliance requirements
- Pushed back transaction will still appear in the worklist queue

NOTE: A transaction can also be terminated by UHR but it typically doesn’t occur that often. The following reflects a terminated status changes to a transaction.

This concludes the user guide. Reference the following link for the latest information on Additional Compensation: https://hrim.hr.ncsu.edu/additional-compensation/