Payroll Allocation Confirmation (PAC) System

Payroll Reporting Coordinator (PRC) Guide

April 2023
Certification Review

Certification or confirmation is an after-the-fact review to determine that the salaries charged to federally sponsored awards accurately reflect the work performed.

As a Payroll Reporting Coordinator, you may be responsible for the pre-review of sponsored statements.

Note: Your institution requires a formal pre-review process. Contact your central administrator if you have any questions or need assistance.

The certification process begins with payroll data loaded into PAC System. This data is generated from your institution's source system. For example, you may use Workday™ to manage your payroll.

PAC System uses the loaded data to generate Payroll or Grant statements for the period of performance.

Note: Payroll changes are not made in PAC System. Any changes to payroll will be made using your source system, then loaded into PAC System.

Pre-review begins prior to your certification period opening. This is an opportunity to review the statements generated by PAC System and verify that the Payroll is accurate before the certifiers complete the certification process. Once the pre-review period ends, and the certification period is open, certifiers can view their statements and attest that their Payroll or payroll charges are accurate.

When the certification process is complete, you can run reports to gather and group the data.
Computed Payroll

PAC System calculates Computed Payroll when statements are generated.

*Computed Payroll* is a percentage based on an individual's total payroll for the period of performance.

Period of Performance

The period of performance is a period of time in which payroll data is grouped to form a Payroll or Grant statement. Each institution's period varies, but a typical period of performance may be a calendar or fiscal year, or a quarterly or monthly period. UVA adheres to a semi-annual period of performance.
Statement Review and Pre-Review

Grant statements are created for grants with payroll for one or more individuals. Payroll statements are generated for individuals (PIs and Faculty). The pre-review process for both Grant and Payroll statements is similar. PAC System calculates the computed Payroll percentage based on an individual's total payroll for the period of performance for both statement types.

Note: Your institution uses both Grant and Payroll statements.

Payroll Statements

Payroll statements show sponsored and non-sponsored grants for an individual. This statement shows 100% of the individual's Payroll for the period of performance.

Grant Statements

These statements show all non-faculty individuals with Payroll on the Grant for the period of performance.

The Work List

As a Primary Payroll Reporting Coordinator (PPRC), any statements requiring your review will automatically appear on your Work List.

If you are a Primary Payroll Reporting Coordinator:
- Payroll statements appear on the Associated Certifiers tab in the Work List.
- Grant statements appear on the Associated Grant Statements tab in the Work List.

If you are not a Primary Payroll Reporting Coordinator:
- All Payroll statements in the Ready for Pre-Review and Ready for Certification statuses will not appear on the Work List. You will need to navigate to your Cost Center Dashboard to access them.

If you are assigned as a Grant Manager or a Restricted Access Coordinator:
Only Grant statements for PIs to which you are assigned as a Grant Manager will appear on the Work List.

Only Payroll statements for certifiers for whom you are assigned as a Restricted Access Coordinator will appear on the Work List.

The Work List is the default start page when you log in to PAC System. You can also navigate to your Work List from anywhere in PAC System.

To navigate to your Work List:
1. Click Home from the top navigator.
2. Click Home Page from the top sub-navigator.

### The Cost Center Dashboard

If you do not have a Work List, you will navigate to the Cost Center Dashboard to find your statements.

To navigate to the Cost Center Dashboard:
1. Click Manage from the top navigator.
2. Click Cost Center Dashboard from the top sub-navigator.
3. Select your desired Cost Center from the dropdown menu and click Choose.

You may also search for a Cost Center using the Cost Center name or code.

### Cost Center Dashboard — Payroll Certification Tab

The Payroll Certification tab shows information about the members of the selected Cost Center and their Payroll statements. You can use the dropdown menus to filter the employee type and period of performance. To see employee information, click the employee name link.

By default, the current period of performance is displayed.
Cost Center Dashboard — Grant Certification Tab

The Grant Certifications tab shows a simple dashboard with information about the current certification process. The selected default employee type and the most recent period of performance is the default view for the Cost Center Dashboard. You may also use the employee type dropdown menu or period dropdown menu to filter the results.

Note: You can hover over any statement status icon to see specifics for the statement.

Cost Share

As your institution uses data loads to collect cost sharing information, the PAC System will automatically update its database to include that information when the data load is complete. Cost share data is typically loaded to the PAC System using information from your institution's source system and does not need to be added manually.

Cost Sharing Reports

To help you successfully monitor cost sharing, the PAC System provides cost sharing reports. These reports show cost sharing and payroll information.

Best practice: Make use of the Cost Share Report, Payroll and Cost Share Report, and PI and Staff Report to keep track of your payroll and cost sharing data.

The Pre-Review Process

As a Payroll Reporting Coordinator or Grant Manager, it's important to complete your pre-review tasks in a timely manner. You pre-review period is 15 days, but may be longer or shorter. Completing this review within the pre-review period means your certifiers won't have to wait to certify their statements.
PAC System sends an email notification when statements are ready for pre-review.

Find Your Payroll Statements

To find a Payroll statement in the Ready for Pre-Review status from the Work List as a PPRC:

1. Navigate to your Work List.
2. Click the Associated Certifiers tab.
3. Find the statement you wish to pre-review. Statements ready for preview have a Ready for Pre-Review status icon.
4. Click the Ready for Pre-Review icon or the status hyperlink to select the statement.

To find a Payroll statement in the Ready for Pre-Review status from the Cost Center Dashboard as a non-primary PRC:

1. Navigate to the Cost Center Dashboard.
2. Click the Payroll Certifications tab.
3. Click the Ready for Pre-Review status icon for the desired statement.

The Payroll Statement Page

The Payroll statement displays three panes with information about the individual, their Payroll, and the period of performance.

- Work List
- Individual Pane
- Statement Pane
The Work List shows the individual's name and Cost Center, categorized by status. You can view the Cost Center information by clicking the Cost Center name hyperlink. You can also search for additional statements from this pane without returning to the Home Page.

The Individual pane shows statement information for the selected individual. You can see other status information for the individual by clicking the arrows ► to expand the category.

The Statement Pane contains specific statement information, including the dates of the period of performance, payroll values, and sponsored and non-sponsored grants.
An important feature of the Statement Pane is the list of icons that allow you to reset and see additional information for the statement.

These three actions are:

- **Reset Statement**: returns the statement to its original values. This is useful if you have made changes to the statement that you'd like to cancel.

- **List of Reports**: displays a list of all reports available to you for the statement. Select the report you'd like to run from the dropdown menu.

- **PDF Reports**: generates a PDF version of the statement that can be downloaded. This may be used in cases where a certifier is unable to access PAC System to certify their statement.

### Additional Statement Action

In addition to reviewing and editing the Payroll statement, you may have an additional action available.

- **$ Value or % Value**

  The **$ Value** or **% Value** action toggles whether the statement shows the dollar or percentage value.
Grant Information

For each grant on the statement, you can hover over the title of the grant to see more information about it, including the associated PI.

Notes, Attachments, Transactions, Activity Log, Email Log, and Certifiers & Approvers

The options may be available to you depending on your institution’s policies and permissions. You can add a note or an attachment to a statement if needed. You may also view transactions and logs for this statement, as well as any certifiers or approvers associated with it.

Payroll Statement Pre-Review

To complete the pre-review for a Payroll statement:
1. Navigate to a Payroll statement in the Ready for Pre-Review status.
2. Review the grant and payroll information and verify that all grants are present and that the Payroll information looks correct.
3. If the grant or payroll information does not appear to be correct, make changes in your source system and wait for the revised data to be loaded back into PAC System.
4. If the grant and payroll information is correct, click Pre-Review.

The status for the statement will automatically change to a pre-review completed status, removing it from your Work List. The statement remains in this status until the certification period opens.

Find Your Grant Statements

To find a Grant statement in the Ready for Pre-Review status from the Work List as a PPRC:
1. Navigate to your Work List.
2. Click the Associated Grants tab
3. Find the statement you wish to pre-review. Statements ready for preview have a Ready for Pre-Review status icon 📞.
4. Click the **Ready for Pre-Review** icon or the status hyperlink to select the statement.

To find a Grant statement in the Ready for Pre-Review status from the Cost Center Dashboard as a non-primary PRC:

1. Navigate to the Cost Center Dashboard.
2. Click the **Payroll Certification** tab for Payroll statements, or click the **Grant Certifications** tab for Grant statements.
3. Click the **Ready for Pre-Review** status icon for the desired statement.

**The Grant Statement Page**

The Grant statement displays three panes with information about the Grant, members of the Grant and their Payroll, and the period of performance.

- Work List
- Grant Pane
- Statement Pane

The Work List shows the Grant's name, categorized by status. You can view the Grant information by clicking the Cost Center name hyperlink. You can also navigate to other statements from this pane without returning to the Home Page.
The Grant Pane shows specific information about the Grant, including the Cost Centers, funding information, and sponsor award number.

```
Project Information
Cost Center: CC0448 - EN-Comp Science Dept
WD Award ID & Name: AWD-000342 EN-CE-1307 Stormwater Management
WD Grant ID & Name: GA11281-163434-101-CRISP Type 2 dMIST Data-driven Management for Interdependent Stormwater...
Sponsor Name - Sponsor Award Number: U.S. NSF - Directorate For Engineering-1735587
Grant Funding Dates: 09/01/2017 to 08/31/2023
```

The Statement Pane shows each employee who was a part of the Grant during the period of performance along with their certified and computed Payroll percentages.

An important feature of the Statement Pane is the list of icons that allow you to see additional information for the statement.

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**Note:** Depending on your institution's settings, these options may not be available or may use different icons.

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These actions are:
- List of Reports
- PDF Reports

**List of Reports** displays a list of all reports available to you for the statement. Select the report you'd like to run from the dropdown menu.

**PDF Reports** generates a PDF version of the statement that can be downloaded.

Additionally, Grant statements have a Hover Over column with two actions:
- Run Payroll Report
- View All Payroll
Run Payroll Report takes you directly to the Reporting page and automatically generates the Payroll Report associated with this Grant statement.

View All Payroll displays a 100% view of how the employee was paid for the period of performance.

Click the corresponding icon to select either the Payroll Report or to view all payroll information for this statement.

Get Help

The Get Help button prepares an email for your Primary Payroll Reporting Coordinator or Grant Manager that you can send for assistance or questions.
PAC System will open your default email client and automatically add a subject line and recipient for you. You can then add your own text to the email and send it.

| Note: All communications sent through your email client are stored there. PAC System does not keep a record of or track these emails. |

Notes, Attachments, Transactions, Activity Log, and Email Log

The options may be available to you depending on your institution's policies and permissions. You can add a note or an attachment to a statement if needed. You may also view transactions and logs for this statement.

Grant Statement Pre-Review

To complete the pre-review for a Grant statement:

1. Navigate to a Grant statement in the Ready for Pre-Review status.
2. Review the payroll information for the Grant.
3. Click Save if you wish to come back to the statement without completing the pre-review.
4. Click Pre-Review to complete the pre-review.
Statements On Hold

You may need to place statements on hold. The On Hold status prevents a statement from being certified or pre-reviewed. For example, payroll changes may have been made to a certifier in your source system, but have not yet been loaded back into PAC System, or a Grant may require additional review before its Grant statements are ready for certification.

Statements may be placed on hold at any time prior to certification and during the pre-review process.

Both Payroll and Grant statements may be put on hold, and multiple statements may be put on hold at a time.

Once placed on hold, the statement will show the On Hold status in red until a Payroll Reporting Coordinator removes the statement from hold.

Place Statement On Hold

To place a statement on hold
1. Navigate to the statement you wish to place on hold.
2. Select the On Hold checkbox.
3. Enter the reason for the hold in the text box. Click Confirm.
   Note: This confirmation only appears if your institution requires a hold reason.
4. Click OK to confirm that the statement is now on hold.

If your institution has On Hold notifications enabled, PAC System will send the notification after you confirm.
Take Statement Off Hold

To take a statement off hold:
1. Navigate to the statement you wish to remove from hold.
2. Deselect the On Hold checkbox.
3. Click OK to confirm that you wish to take the statement off hold.
4. If your organization has Off Hold notifications enabled:
   a. Click OK to enter text for and send the email notification.
   b. Click Cancel to cancel sending the notification.
5. Click OK to confirm that the statement is now off hold.

Place Statements On Hold Page

You may have the rights to place multiple statements on hold using the Place Statements On Hold page.

Contact your Central Administrator if you have questions about these rights.

To place multiple statements on hold:
1. Click Manage from the top navigator.
2. Click Place Statements On Hold from the sub-navigator.
3. Select the type of statement you wish to put on hold:
   a. Select the Grant Statements tab for Grants.
   b. Select the Payroll Statements tab for Payroll.
4. Enter the information in the fields:
   a. School/Cost Center or Grant Manager
   b. Employee type
   c. Period or Grant Period
5. Select the certifier or grant to place on hold by clicking the arrow button for a single certifier or grant, or click the double arrow button to hold all certifiers or grants listed.
6. Click Save.
Monitoring the Certification Process

PAC System provides multiple tools to help you manage and monitor the certification process. Within the Payroll and Grant statement pages, you can run reports for payroll-related results. You should also monitor the Cost Center Dashboard for a quick overview of the certification period.

You can generate additional reports from the Reporting page. For certification, the Certification Status Report and the Grant Status Report are most commonly used to get an overview of your certification progress.

The Look Up Page

The Look Up page allows you to search for people, Cost Centers, grants, and other information within PAC System.

Depending on your institution’s settings, you may need to look up different field types:

- Employee
- Cost Center
- Active Award/Grant
- Inactive Award/Grant

For any search criteria, begin by entering at least 3 characters of the search term. Alphanumeric characters are allowed.

Payroll Statements

If your institution uses Payroll statements, you'll typically search for employees. If you enter an exact search term match—for example an employee’s full name or employee ID—PAC System will direct you to the Payroll statement for that employee. Otherwise, the PAC System will display a list of employees that match your search term.

Grant Statements

If your institution uses Grant statements, you'll search for Grants by their name or number.

To navigate to the Look Up page:

1. Click Manage from the top navigator.
2. Click Look Up from the sub.navigator.

In the example above, we've entered 3 letters. As you type, PAC System will begin to display matches to your search term. Continue typing for more specific results.
Introduction to Reporting

PAC System has a wealth of reports to quickly provide you with accurate and specific data. This guide will help you find and generate the right report.

Every report has a different purpose, but all reports have parameters and options in common.

To access the Reporting page:

1. Click Reports from the top navigator.
2. Click Reporting from the top sub-navigator.

Tip: If you do not have access to the correct reports, contact your Central Administrator for assistance.

The Reporting Page

The Reporting page is separated into different panels to allow you to find the right report and run it with the correct criteria. The panels are:

- Category — Quickly find the type of report you need.
- Reports — Show a subset of the reports within the category.
- Description — An explanation of the results you can expect from the selected report.

Parameters, Results, Customize

Each report also has additional tabs for:

- Parameters — Set your search criteria.
- Results — The results of your report.
- Customize — Change your customized reports, or queries, indicated by the wrench icon.


Generate Reports

Reports are available to you depending on your roles and rights within the PAC System as well as any Cost Center relationships you may have. You can generate a report at any time, with any set of parameters. While there are many reports available, you may only use a few that are specific to your role.

To generate a report
1. Find the category and click the name of the report. The description of the report will be displayed in the Description pane.
2. Set your desired report parameters in the Parameters tab. Depending on the report, you may have a few or many choices.

Parameter Options

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<tr>
<th>Button/Field</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>Arrow Button �ighthand</td>
<td>Select your parameter, then use the arrow button to move your parameter from left to right to add, or from right to left to remove.</td>
</tr>
<tr>
<td>Double Arrow Button</td>
<td>Move all parameter options from one panel to the other.</td>
</tr>
<tr>
<td>Text Search Field</td>
<td>Begin by typing at least three letters of your desired search term. Your results will be displayed as you continue typing. For some searches you may be able to further refine your search to include sub-parameters, such as sub-Cost Centers, by clicking Expand Search.</td>
</tr>
<tr>
<td>Check Box</td>
<td>Select multiple parameters or items.</td>
</tr>
<tr>
<td>Radio Buttons</td>
<td>Select one item.</td>
</tr>
<tr>
<td>Date Picker Button</td>
<td>Select a date. You can click a date from the picker or type a date in the field.</td>
</tr>
<tr>
<td>Button/Field</td>
<td>Function</td>
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</tr>
<tr>
<td>Informational Button</td>
<td>Click to get more information about any parameter. Click again to close the hover information.</td>
</tr>
<tr>
<td>Drop-down Menu</td>
<td>Select an option from the list.</td>
</tr>
<tr>
<td>Blank Field</td>
<td>If a field entry is not required, the field can be left blank. Leaving the field blank will act as a wild card, which will include all possible results. This can cause reports to be very large and take more time to generate.</td>
</tr>
</tbody>
</table>

3. Once your parameters are set, click the **Run Report** button.

4. You may receive an error indicating that your report contains no data. To resolve this, re-check your parameters or widen your search criteria, then click **Run Report** again.

5. PAC System displays your report in the Results tab automatically.

**Tip:** You can download your results in different file formats. Your file format options are displayed in the **Results** tab below the report data.

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**Choosing the Right Report**

Reports provide the necessary data for you to determine what tasks need to be completed, which users have certified or not yet certified, and many other data points.

Your institution may have additional custom reports that have been created by your Central Administrator. These custom reports are created to your specific requirements and are not listed below.
## Commonly Used Reports

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<th>Purpose</th>
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<td>Monitoring the certification process</td>
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<td></td>
<td>See a list of all Payroll statements in the selected status</td>
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<tr>
<td>Management</td>
<td>Grant Status Report</td>
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<td></td>
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<td>See a list of all Grant statements in the selected status</td>
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<td>Management</td>
<td>Payroll Task Listing</td>
<td>Find unfinished tasks within the workflow</td>
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<td></td>
<td>See existing tasks and reassign tasks to different users</td>
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<td>Monitoring</td>
<td>Employee Type History</td>
<td>Monitoring the certification process</td>
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<td></td>
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<td>See employee type changes for the specified certifier,</td>
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<td></td>
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<td>history for the employee type, and the date of the</td>
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<tr>
<td></td>
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<td>employee type change</td>
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<td>selected statuses</td>
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<td>Management</td>
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<td>Find employees whose computed Payroll or certified Payroll total</td>
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<td>has exceeded your user-defined threshold</td>
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<td>See all Payroll or Grant statements for a self-certifier or Cost Center</td>
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<td>Certifier Payroll Summary</td>
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<td>See a list of an employee's grants and payroll for a 12-month period</td>
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<td>Payroll/Cost Share</td>
<td>Cost Share</td>
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<td>See a list of all cost share entries in PAC System</td>
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<td><strong>Monitoring certification process</strong>&lt;br&gt;See a list of certifiers with Payroll statements that have been reopened using PAR</td>
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<td>Payroll/Cost Share</td>
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**Find a report category:**

- Management
- Monitoring
- Payroll/Cost Share
## Management

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<td>See an overview of your institution's Payroll statement certification progress by:</td>
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<td>Payroll Task Listing</td>
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<td>Potential Certification Conflict</td>
<td>See a list of any Payroll statements that were certified and processed by the same employee</td>
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<td>Grant Status</td>
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<td>See a list of all users whose computed Payroll or certified Payroll total has exceeded the threshold</td>
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<td>Work List Report</td>
<td>See all Payroll or Grant statements for a self-certifier or Cost Center</td>
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## Monitoring

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<td>Find Cost Centers that do not yet have primary Payroll Reporting Coordinators assigned</td>
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<td>Grant Without Principal Investigators</td>
<td>Find grants that do not yet have Principal Investigators associated</td>
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<td>List of New Users Since Last Certification</td>
<td>See a list of all new users added since your last certification period</td>
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<td>List of Designees</td>
<td>A custom query that lists all designees and the grants to which they are assigned</td>
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<td>A custom query that displays all certifiers with an assigned proxy</td>
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## Payroll/Cost Share

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<tr>
<td>Cost Transfer</td>
<td>See a list of all cost transfer entries in PAC System</td>
</tr>
<tr>
<td>Certifier Payroll Summary</td>
<td>See all of a selected certifier's grants by payroll period</td>
</tr>
<tr>
<td>Certifier Salary Activity</td>
<td>See a list of all individuals associated with a certifier's grants and their activities for a 12-month period</td>
</tr>
<tr>
<td>Cost Share</td>
<td>See a list of all cost share entries in PAC System</td>
</tr>
<tr>
<td>Monthly Funding and Payroll Information</td>
<td>See the distribution of labor charges for a certifier for any month</td>
</tr>
<tr>
<td>Payroll Adjustment Reconciliation</td>
<td>See a list of certifiers with Payroll statements that have been reopened using PAR</td>
</tr>
<tr>
<td>Payroll and Cost Share</td>
<td>See all payroll and cost share transactions for a specific date range and individual</td>
</tr>
</tbody>
</table>
## Report | Purpose
---|---
Payroll | See payroll information for a specific individual, Cost Center, or grant within a date range
PI and Staff Payroll | See a list of all individuals who charge a Principal Investigator's grant with their monthly salary charges
Proactive Cost Transfer | See all cost transfers and payroll data generated by PAC System
SPES (Sponsored Grant Employee Summary) | See a list of all employees that were paid from a specific grant and verify the accuracy of the charges
SPES Summary | See a list of all employees that were paid from a specific grant during the selected date range
View Payroll Distribution Request | See current payroll distribution percentages for an individual
Post-Certification Processing

Overview

When certification is complete, a post-review can be performed. Post-review, adds a final step in the certification process that allows you to review and finalize Payroll statements in the Certified, Not Processed status.

Post-certification is not required for a statement where no changes were made to the certified Payroll during certification. If the certified Payroll and computed Payroll values remain as-is, no further processing is required.

If a certifier attests to payroll outside of the original computed Payroll, your system settings will check if the variance is within your desired threshold. If the variance is exceeded, PAC System will generate a post-certification task.

Note: The variance and threshold information is set by your Central Administrator.

How to Get Help with PAC System

Embedded Help

PAC System provides embedded, built-in help information within the application. Click the embedded help icon 🛠️ to get additional information about the function or page you’re viewing.

Contacting Support

There are several ways to contact our Support team. Depending on the urgency of the issue, you can use the following methods:

- Visit the PAC System Support Portal website
- Email [INSERT EMAIL]
- Call [INSERT NUMBER]

These details are also listed on the PAC System Support Portal website.