

# PAC SYSTEM – MANAGING COST CENTER RELATIONSHIPS

This guide serves as a reference to managing Cost Center Relationships in the PAC system.

## Primary Payroll Reporting Coordinator

Each cost center with sponsored accounts must have one Primary Payroll Reporting Coordinator (PRC), who is shown in their cost center list highlighted in yellow. A cost center can have multiple PRCs, but only one primary may be assigned at any time. The Primary PRC receives all system-generated tasks and email notifications for their assigned cost centers.

	<b>Primary Payroll Reporting Coordinator</b> 	<b>Non-Primary Payroll Reporting Coordinator</b> 
<b>Receives system generated emails</b>		
Pre-Review Period Opening - PAC statements	<b>X</b>	<b>X</b>
Pre-Review Period Opening - Grant Statements	<b>X</b>	
Certification Period Opening - PAC statements	<b>X</b>	<b>X</b>
Certification Period Opening - Grant Statements	<b>X</b>	
Certification Summary Emails - PAC statements ONLY	<b>X</b>	<b>X</b>
Certification Reminder Emails - PAC statements	<b>X</b>	
Certification Reminder Emails - Grant Statements	<b>X</b>	
Get Help button on Statements	<b>X</b>	
<i>**if a PRC is assigned to a specific PI or grant, they will receive emails as a Primary PRC would expect**</i>		
<b>Work List</b>		
Responsible for Pre-Reviewing all statements associated to assigned Cost Centers	<b>X</b>	<b>X</b>
View PAC Statements from Work List	<b>X</b>	
View Grant Statements from Work List	<b>X</b>	
View PAC Statements from Cost Center Dashboard	<b>X</b>	<b>X</b>
View Grant Statements from Cost Center Dashboard	<b>X</b>	<b>X</b>
<i>**if a PRC is assigned to a specific grant, their Worklist will appear the same as a Primary PRC would expect**</i>		
<b>Tasks</b>		
Adding and/or removing PRCs from Cost Centers within the PAC System	<b>X</b>	
Assigning Primary PRCs within the PAC System	<b>X</b>	
Assigning Grant Managers within the PAC System	<b>X</b>	
Assigning Grant Manager Overrides within the PAC System	<b>X</b>	
Assigning Statement Proxies/Designees within the PAC System	<b>X</b>	<b>X</b>

## Assigning Additional Relationships

Each cost center has a **Primary Payroll Reporting Coordinator** who is responsible for managing their cost centers. The Primary PRC role can also assign the following relationships:

- Restricted Access Payroll Reporting Coordinator
- Grant Manager
- Grant Manager Override

### Restricted Access Payroll Reporting Coordinator

An employee with the Restricted Access PRC relationship can only view PAC statements for those employees to whom they are assigned. They will not have full access to view PAC Statements for anyone else in a cost center.

### Grant Manager

A Grant Manager relationship allows a PRC to be assigned to a group of principal investigators, or for a specific grant. When using the Grant Manager functionality, the PRC, by default, is assigned as the Grant Manager for all Grants in the Cost Center.

**Note:** Assigning a Grant Manager will automatically create a Restricted Access PRC relationship.

### Primary PRC Assigning a Grant Manager Override

By default, the Primary PRC is assigned as the grant manager for all Grants in the Cost Center. If another administrator is required to manage a Grant within the Cost Center, they need to be assigned as the Grant Manager. This can be achieved by overriding the current Grant Manager using the Grant Manager Override assignment.

The Grant Manager Override is a one-off assignment where a specific Grant is assigned to another administrator. The PI to Grant Manager relationship is one to one (a PI can only have one Grant Manager), but on a grant-by-grant basis, another administrator can have oversight.

A Grant Manager Override can be assigned from either the Grant Certification Tab or the Account / Award Summary page.

**Note:** If there is Grant Manager assigned to a PI and a Grant Manager Override assigned to one of the PI's Grants, both the Grant Manager and Grant Manager Override will be able to view the tasks related to the Grant.

## Primary PRCs Assigning an Alternate Primary PRC

To assign the Primary PRC role to an employee:

1. Navigate to the Cost Center Information tab on the appropriate Cost Center Dashboard.

Payroll Certifications	Time Studies	Grant Certifications	Award and Grant	Cost Center Information
<b>Cost Center Basic Information:</b> Name: EN-Elec & Comp Engr Dept Description: CC0453 EN-Elec & Comp Engr Dept Active: Yes				Type: CC0453 Code: Q
<b>Cost Center Payroll Coordinator(s)</b>				
Name	Address	Phone	Email	Action
Fan, Jingyi - 893912404			jf5nf@virginia.edu	
Fitzgerald, Sherry D - 475756291			sdf@virginia.edu	
Kitchin, Elizabeth DeVibiss - 515620239			edw5z@virginia.edu	
Magilley III, Edward Joseph - 378900139			ejm9r@virginia.edu	
Zapata, Patricia - 767620376			jsq9xb@virginia.edu	
Add				

2. The current Primary PRC is identified by the yellow highlighted line.

Magilley III, Edward Joseph - 378900139	ejm9r@virginia.edu
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3. Find the desired PRC you wish to assign to the Primary PRC role and click on the pencil icon in the Actions column.
4. The PAC system will automatically refresh and the PRC you selected will now be assigned as the Primary PRC. To verify that this assignment has occurred, the new Primary PRC will be highlighted in yellow.

Payroll Certifications	Time Studies	Grant Certifications	Award and Grant	Cost Center Information
<b>Cost Center Basic Information:</b> Name: EN-Elec & Comp Engr Dept Description: CC0453 EN-Elec & Comp Engr Dept Active: Yes				Type: CC0453 Code: Q
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Magilley III, Edward Joseph - 378900139			ejm9r@virginia.edu	
Zapata, Patricia - 767620376			jsq9xb@virginia.edu	
Add				

## Primary PRCs Assigning or Removing a Relationship

To assign a relationship to an employee:

5. Click Add from the Cost Center Payroll Reporting Coordinator(s) section to open the Manage Assignments tool.

<b>Department Basic Information:</b> Name: Huron Training Department Description: Huron Training Department Active: Yes	
<b>Department Effort Coordinator(s)</b>	
Name	
Arnold, Beth - 99887702	
Hanada, Molly - 99887707	
Add	

6. Enter the name of the employee for whom you wish to assign certifiers in the **Select User field** and click the correct name.

<b>Manage Assignments</b>	
Department:	Hurontraining - Huron Training Department
Select User:	

**Department:** Hurontraining - Huron Training Department

**Select User:** George

**Manage Restricted Access Effort Coordinators**

**Unassigned PI/Certifier List**

[Certifiers associated to selected Department]

Harris George - 19180338

George town George - HCGBC11

George Matt - mattgeorge

- Cost Center certifiers will be listed within each section. You can create multiple relationship types as needed.

**Select User:** George Matt - mattgeorge

**Manage Restricted Access Effort Coordinators**

**Unassigned PI/Certifier List**

[Associated certifiers]

Arnold, Beth - 99887702 (Hurontraining)

Jones, Frankie - 99887701 (Hurontraining)

Kealy, Pat - 99887706 (Hurontraining)

Meadows, Steve - 99887704 (Hurontraining)

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**Manage Primary Access Effort Coordinator Overrides**

**Unassigned PI/Certifier List**

[Associated certifiers]

Jones, Frankie - 99887701 (Hurontraining)

Kealy, Pat - 99887706 (Hurontraining)

Meadows, Steve - 99887704 (Hurontraining)

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**Manage Grant Manager Assignments**

**Unassigned PI/Certifier List**

[Associated certifiers]

Arnold, Beth - 99887702 (Hurontraining)

Jones, Frankie - 99887701 (Hurontraining)

Karoli, Tim - 99887705 (Hurontraining)

Kealy, Pat - 99887706 (Hurontraining)

Meadows, Steve - 99887704 (Hurontraining)

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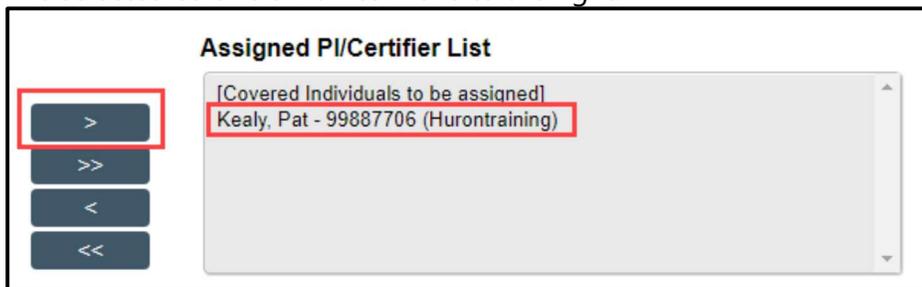
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- In the Unassigned PI/Certifier List pane, click the name of the certifier to assign.
- Click the right arrow button to add the selected certifier to the right. All certifiers in the list can be added by clicking the double right arrow button.

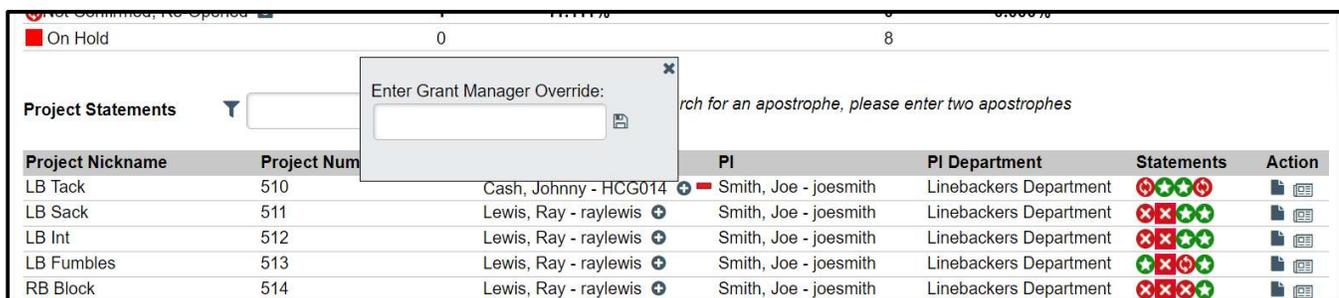
10. The selected certifiers' names move to the right.



7. Click **Save** when all desired assignments have been made.

### Assigning a Grant Manager Override

A Grant Manager Override can be assigned from either the Associated Grant Tab or the Account / Award Summary page. On the Associated Grant Tab, all PIs are listed with their assigned Grant Managers for each Grant they are related to. Under the Grant Managers column, each Grant Manager is listed with a green plus next to their name. To assign a Grant Manager Override, the user selects the plus sign icon next to the current Grant Manager's name. This brings up a search field where the user can search for an individual to assign as a Grant Manager Override for that Grant.

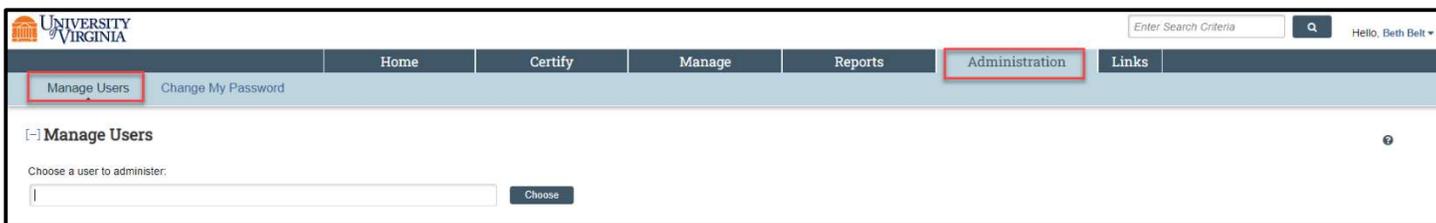


**Note:** The Grant Manager Override user must be in a Role prior to assignment. Contact your Central Administrator to check the role for the employee.

### Assigning a Proxy for a Faculty PAC Statement

To assign a Proxy for a PI or Faculty who is unable to complete their certification responsibilities:

1. Navigate to the Manage User Page and enter the name of individual you need to assign a Proxy for.



2. Click on the Assignments Tab and scroll down to the Proxy assignment section.

Choose a user to administer:  
Lindsey Lee Jones - 832444734 Choose

Website Access	Audit Access	Email Access	Key Personnel	TPE Designation	Auto Process	CARE Certifier	Organ Transplant Certifier	Ryan White Certifier	Go To Effort Statement
First Name:	Lindsey	Last Name:	Jones	Middle Initial:	Lee	Prefix:		Suffix:	
Title:		Appointment:		Location:		Phone:			
Username:		Employee Id:	832444734	Alternate Identifier:					
Job Code:		Job Position:	P488642	Address:					
FTE Value:	1.0	Job Description:	UTA-Cohoon	Commitment Level Code:					

User Info Relationships **Assignments**

**Roles for Lindsey Lee Jones - 832444734:**

Role	Description	Active
Central Admin	Central Administration	<input type="checkbox"/>
Certifier	Self-Certifiers (PIs and Faculty)	<input type="checkbox"/>
Dean/Chair Designee	Dean/Chair Designee	<input type="checkbox"/>
Grant Manager	Grant Manager	<input type="checkbox"/>
MCR Admin	MCR Admin	<input type="checkbox"/>
MCR Certifier	MCR Certifier	<input type="checkbox"/>
Payroll Reporting Coordinator	Payroll Reporting Coordinator	<input type="checkbox"/>
Primary PRC	Primary Payroll Reporting Coordinator	<input type="checkbox"/>
Time Study Central Admin	Time Study Central Admin	<input type="checkbox"/>
Time Study Coordinators	Time Study Coordinators	<input type="checkbox"/>
Time Study Owner	Time Study Owner	<input type="checkbox"/>

**Proxy for Lindsey Lee Jones - 832444734:**

Please input the name or employee ID of the person whom you wish to designate as a proxy for this user. You will need to select a reason for the proxy assignment prior to saving it.

Proxy:

Reason: [Select Reason] Save Certifier Proxy Cancel

3. Enter the name the name of individual (i.e., co-PI, faculty member, Dean, Chair) you wish to assign as the Proxy for the individual you are making the assignment for, select the appropriate reason for the assignment, and click the Save Certifier Proxy button.

**Proxy for Lindsey Lee Jones - 832444734:**

Please input the name or employee ID of the person whom you wish to designate as a proxy for this user. You will need to select a reason for the proxy assignment prior to saving it.

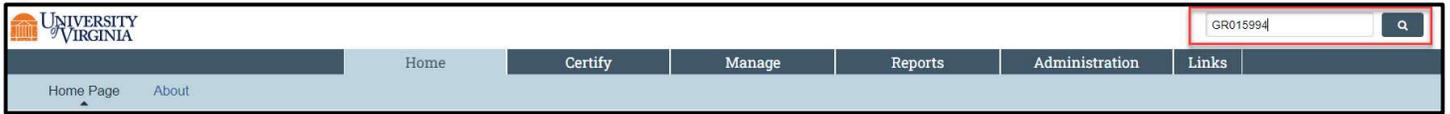
Proxy:

Reason: Sabbatical Save Certifier Proxy Cancel

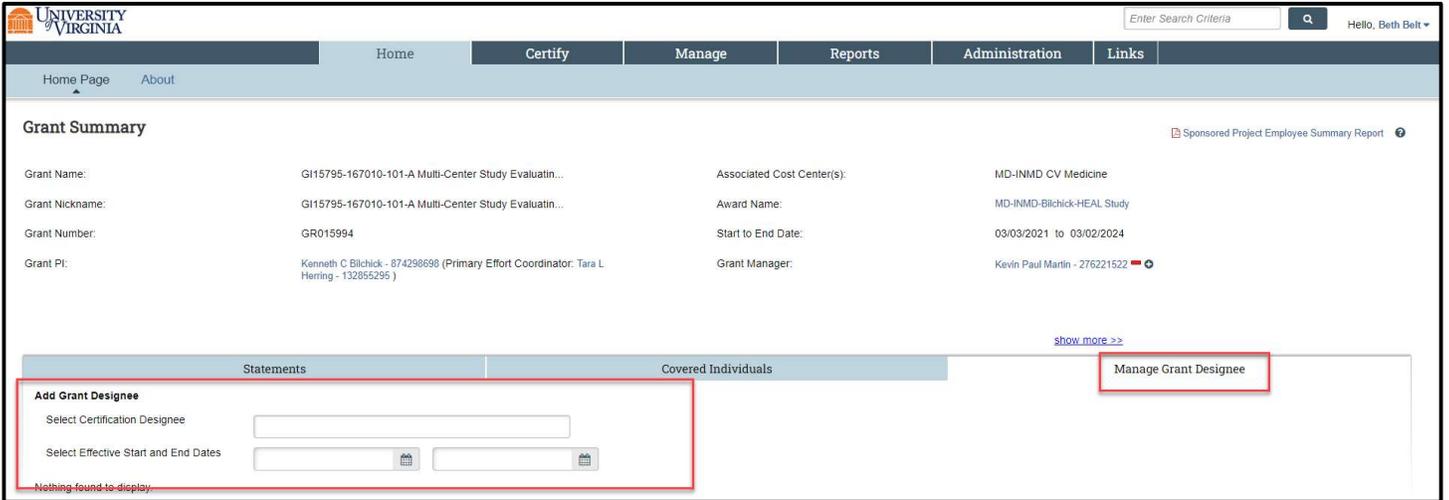
## Assigning a Designee for a Grant Statement

To assign a Designee for a PI or Faculty who is unable to complete their certification responsibilities:

1. Enter the Grant number for the grant you wish assign a Designee for, to navigate to the Grant Summary Page.



2. Click on the Mange Grant Designee Tab and enter the name of the individual you wish to assign the Designee role to for the selected Grant.



3. Enter the Effective Start Date for when you wish the Grant Designee assignment to begin. If you know the desired End date, you may also enter that date. If the End Date is unknown, leave this field blank. Once you have entered all relevant information, click the Add Designee button.

