

CU 8.9 HRMS Step by Step Guide Correction PET (PETC) - Organizational Development Module

Overview: This guide provides instruction on creating Correction Payroll Expense Transfer (PETC) transactions in HRMS. Here are some general PET guidelines:

- > PET transactions can only be created when the HRMS system is available to users; refer to the Payroll Production Calendars for more information.
- > A PET does not pay additional money or collect money back from an employee; this process moves part or all of an existing payroll transaction to a different funding source.
- > PETC is not available for <u>Work Study</u> payroll transactions. Contact your Financial Aid/Student Employment office to request a FAM PET.
- > See more PET tips at the end of this guide.

In version 8.9, Oracle/PeopleSoft has changed the name of Develop Workforce to Organizational Development.

Note: The screen shots used in this guide may not be representative of your access.

- 1. Navigate to the Correction PET page
- Organizational
 Development
- PositionManagement
- Maintain Positions/ Budgets
- Correction PET

Universityof Colorado HR89PRAC PRACT20 Home | Worklist | Add to Fa Menu Main Menu > Organizational Development > Position Manager Search: 0 Maintain Positions/Budgets My Eavorites Position, funding and PET information Reports and Reviews Add/Update Position Info Position Transfer only Recruiting Workforce Administration Funding Distribution Enter the description, work location, and other information about a position. Position Transfer only Compensation Time Collection Workforce Development Position Approval Position Approval PET/Retroactive Funding Change Organizational Development Funding Approval Funding Approval PET/Retroactive Funding Change Position Management ositions/Budgets Add/Update Position Correction PET PET Approval PET Approval PET Approval (Sponsored Proj) PET Approval (Sponsored Proj) Info Funding Distribution Position Transfer only Position Approval PET Cancellation PET Cancellation Funding Approval PET/Retroactive Funding Change Correction PET - PET Approval PET Approval (Sponsored Proj) PET Cancellation
 Review Position/Budget Info D Position Reports ▷ Enterprise Learning
▷ Reporting Tools



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EMPLOYEE SERVICES

2. Correction PET search page displays

 Enter one or more of the search fields



 Click on the desired payroll transaction

Correction PET

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Enter any information you have and click Search. Leave fields blank for a list of all values.

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Paycheck Number:	=	~		
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Basic Search 📕 Save Search Criteria

Search Results

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3. Journal Date

- The current date displays as the Journal Date
- Modify if instructed by campus Finance office – only use a date in an open accounting period

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4. Journal Description

Be specific in your description, and include all of the following that may apply:

- How will the transfer affect the program and/or project?
- Why was the correct funding source not charged initially?
- Has the transfer been delayed for any reason?

5. Certification Checkbox

- Required if moving expenses in or out of Fund 30, 31, or 34
- Read the certification paragraph carefully
- Click the checkbox to certify that the PET adjustments are appropriate

cription Examples of GOOD journal descriptions:

Subcontract from UW for current year was delayed, resulting in charges for employee's salary continuing to be charged to ST for previous year (63063943). Salary expenses should be transferred to current year ST 63069362.

Received ST for UCH grant on 1/27/06. Employee's effort in July was 50% on ST 62969647 and 50% on ST 63064233.

Employee began work on ST 63069150 in Dec '05. SpeedType was not available for Dec payroll cutoff. This change reflects correct effort for Dec '05.

Examples of POOR journal descriptions:

Moving Salary out of suspense

Salary went to wrong SpeedType

Per Jane Doe, moved salary to ST 11012345

I certify that all payroll requested to be transferred is appropriate to be charged to the sponsored project(s) or gifts (Fund 30, 31 or 34 FOPPS) receiving the charge and the information contained in the description field above is true and correct, that costs transferred onto a sponsored project or gift meet the direct cost and other costing criteria and are within the allowable timeframe for transfer (see campus policy for direct cost and other costing criteria and are within the allowable timeframe for transfer (see campus policy for direct cost and other costing criteria and timeframe) or consistent with the donor restrictions. The header description includes the cause of the error and additional information as required by campus policy. I understand that the charges must reflect actual effort and that commensurate certification of level of effort will also be required through the "Personnel Effort Report."



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6. Select Earnings To Transfer

- Click the Transfer box at the end of the row to select the desired earnings
- Multiple earning rows may be selected
- To transfer ALL earnings rows, click
 Select All
- To clear all transfer selections,
 Click Deselect All
- Once earnings have been selected, click

Transfer

7. Transfer Page displays

- Under Transfer Data enter the dollar amounts and SpeedType to be charged
- Tab out of
 Speedtype field to
 display FOPPS and
 Account chartfield
 detail (account code
 can not be modified)
- Add rows until entire transfer amount is accounted for

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Correction PET

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8. Validate PET

- Once all Transfer
 Data is entered click
 Validate
- The system will check the proposed changes for errors, and assigns a PET Transfer ID (also called Journal ID)
- Retain the Transfer
 ID to review the PET
 in the future
- Any modification to university paid benefit or taxes due to the PET may be viewed by expanding those sections

University-Paid Benefits Summary
 University-Paid Tax Summary

9. Contact PET Approver

- The PET must be approved before the transfer is complete (see the PET Approval step-bystep guide for more information)
- To print a copy of the PET for your records, click the <u>PET Report</u> link at the top of the page to initiate a printable format

(Note – this page does not print well unless the report format is used)

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Dental

Valid



CORRECTION PET TIPS

Selecting Earnings Rows – Leave Codes (PETC)

- If an Earnings Row of RGS is selected for transfer (step 6 above), all leave earnings will be autoselected as well
- It may be appropriate for the leave amount to be transferred.
 However, if the leave earnings should not be transferred, click the check box to deselect before proceeding to the "Transfer" step.

How To Change PET or Correct Errors

Leave Earnings Codes

- **ADM** Administrative Leave **CMP** - Compensatory Time FLV - Family Leave FSK - Family Sick Leave FLH - Floating Holiday **FNL** - Funeral Leave **JRY** - Jury Leave OJI - On the Job Injury **MLP** - Paid Military Leave **SCL** -School-Administrative Leave **SCK** - Sick Leave Taken **SDV** - Staff Development **VAC** - Vacation Leave Taken VOL - Volunteer-Administrative Leave 1. Approved PETs can not be modified. Create a new PET with the correct transfer information.
- 2. <u>Until the PET is approved, rejected or cancelled, no other PET process</u> <u>may be created for this position/employee/pay period combination.</u> Funding updates for current or future pay periods are allowed.
- 3. If transfer is in **Error status**, a speedtype and/or account chartfield has been inactivated in the Finance system (FIN). Contact your Finance office to request an update in FIN.
- 4. For an unapproved **Correction PET**, the only fields that may be modified are the journal date or journal description. If any of the transfer detail is incorrect, **cancel the PET** and <u>create a new PET</u>.

PET Processes for "Old" Payroll Data

DATES	WHICH PET PROCESS TO USE
4/1/03-Future	Use HRMS Payroll Expense Transfer processes
7/1/00-4/1/03	Use PS 7.0 GL FIN PET process or Batch Upload
Prior to 7/1/00	Use Batch Upload - contact the Office of University
	Controller's help desk for assistance

Correction PET - complete.

Correction PET

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