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 Work Study 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
   - Position Management
   - Maintain Positions/Budgets
   - Correction PET
2. Correction PET search page displays

- Enter one or more of the search fields
- Click **Search**
- Click on the desired payroll transaction

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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
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?

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

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
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
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.

9. Contact PET Approver

- The PET must be approved before the transfer is complete (see the PET Approval step-by-step guide for more information).
- To print a copy of the PET for your records, click the PET Report 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)
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 auto-selected 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.

Leaf 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

How To Change PET or Correct Errors

1. **Approved PETs cannot be modified.** Create a new PET with the correct transfer information.

2. Until the PET is approved, rejected or cancelled, no other PET process may be created for this position/employee/pay period combination. 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 create a new PET.

PET Processes for “Old” Payroll Data

<table>
<thead>
<tr>
<th>DATES</th>
<th>WHICH PET PROCESS TO USE</th>
</tr>
</thead>
<tbody>
<tr>
<td>4/1/03-Future</td>
<td>Use HRMS Payroll Expense Transfer processes</td>
</tr>
<tr>
<td>7/1/00-4/1/03</td>
<td>Use PS 7.0 GL FIN PET process or Batch Upload</td>
</tr>
<tr>
<td>Prior to 7/1/00</td>
<td>Use Batch Upload – contact the Office of University Controller’s help desk for assistance</td>
</tr>
</tbody>
</table>

Correction PET - complete.

3/15/2007