Overview: This guide provides instruction on approving valid Payroll Expense Transfers in HRMS. PET transactions can only be approved when the HRMS system is available to users. Refer to the Payroll Production Calendars for more information:

<table>
<thead>
<tr>
<th>If the PET contains or impacts distributions to:</th>
<th>PET Certification Required?</th>
<th>You will need:</th>
<th>And will use this Approval Page:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fund 30 or 31</td>
<td>Yes</td>
<td>Approval Authority for Sponsored Projects</td>
<td>PET Approval (Sponsored Proj)</td>
</tr>
<tr>
<td>Fund 34</td>
<td>Yes</td>
<td>Standard PET Approval Authority</td>
<td>PET Approval</td>
</tr>
<tr>
<td>All Other Funds</td>
<td>No</td>
<td>Standard PET Approval Authority</td>
<td>PET Approval</td>
</tr>
</tbody>
</table>

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 appropriate PET Approval page
   - Organizational Development
   - Position Management
   - Maintain Positions/Budgets
   - PET Approval
   - PET Approval (Sponsored Proj)
2. **PET Approval search page displays**

- Enter one or more of the search fields
- TIP - search by the Transfer ID for quickest results
- Click [Search]

3. **PET Approval page displays**

- Page shows summary results of PET transaction
- To view details, click [Transfer Detail]
- To view the transfer detail for benefits and taxes paid by the department, click on the arrows beside the category heading

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**PET Approval**

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

**Find an Existing Value**

- **Payroll Expense Transfer ID:** begins with [PETC075542]
- **Journal Date:**
- **User ID:** begins with
- **Pay Period End Date:**
- **SpeedType:** begins with
- **Department:** begins with
- **Position Number:** begins with
- **EmpID:** begins with
- **Paycheck Number:**
- **Expense Transfer Status:**

[Search]  [Clear]  [Basic Search]  [Save Search Criteria]

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**Transfer Summary**

- **Expense Transfer ID:** PETC075542
- **Journal Date:** 03/06/2007
- **Transfer Status:** Valid
- **Approve/Save**  [Reject]

**Transfer Details**

| Journal Description: | OTM for January 2007 should not be charged to same speedtype as base salary | Move $27.85 to 5100556 | Certified by:
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Sum of Journal Debits:</td>
<td>$32.36</td>
<td>Sum of Journal Credits:</td>
<td>$32.36</td>
</tr>
<tr>
<td>Status</td>
<td>Account</td>
<td>SpeedType</td>
<td>Fund</td>
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<td>-----------</td>
<td>------</td>
</tr>
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<tr>
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<td>51454303</td>
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</tr>
</tbody>
</table>

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**University Paid Benefits Summary**

**University-Paid Tax Summary**

- 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 FOPP) receiving the charge and the information contained in the description field above is true and honest, that costs transferred onto a sponsored project or gift meet the direct cost and other costing criteria and are within the allowable time limit to transfer (see campus policy for direct cost and other costing criteria and terminology) and consistent with the donor restrictions. The header description includes the cause of the entry 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."
4. Transfer Detail page displays

**SCROLL TO THE RIGHT ON THIS PAGE, DATA DOES NOT ALL DISPLAY ON MAIN VIEW**

- Page shows each distribution line that was changed by the transaction
- Detail includes these additional fields:
  - Pay End Date
  - Check #
  - Name
  - Position
  - Earnings Code
  - HR Dept
  - Job Code

- To view the transfer detail for benefits and taxes paid by the department, click on the arrows beside the category heading

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`University-Paid Benefits Summary`

`University-Paid Tax Summary`
5. View Status of PET

- List of Transfer Status values:
  - A = Approved
  - D = Distributed
  - E = Error
  - G = General Ledger
  - L = Accrual
  - P = Proposed
  - R = Rejected
  - T = Transfer Complete
  - V = Valid

6. View Fund Opt information (Transfer Detail)

- The Fund Opt field is to the far left of the Transfer Detail page
  - A = Actual
  - E = ENP Accrual
  - F = Fringe Pool
  - N = No Defaults
  - O = Time-entry Override
  - P = Campus Fund Pool
  - R = Reversal
  - S = Suspense
  - X = Exception

- Fund Opt fields are blank for reversals from pay periods processed in HRMS version 7.5
- Reversal entries process a negative dollar amount
7. Approve or Reject the PET

- If data needs to be modified, contact the person who created the PET.
- To approve, click Approve/Save.
- To reject, click Reject.
- 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)

**ADDITONAL PET TIPS**

**How To Change PET or Correct Errors**

1. **Approved PETs can not 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. If **Correction PET** was created incorrectly (and is in Valid or Error status), **cancel the PET** and create a new payroll expense transfer.

5. If **Retroactive Funding PET** was created with incorrect information (and is in Valid or Error status), go back to the PET/Retroactive Funding page link, open the existing PETR, make any necessary changes and click Validate/Save.

Approve Payroll Expense Transfer - complete.