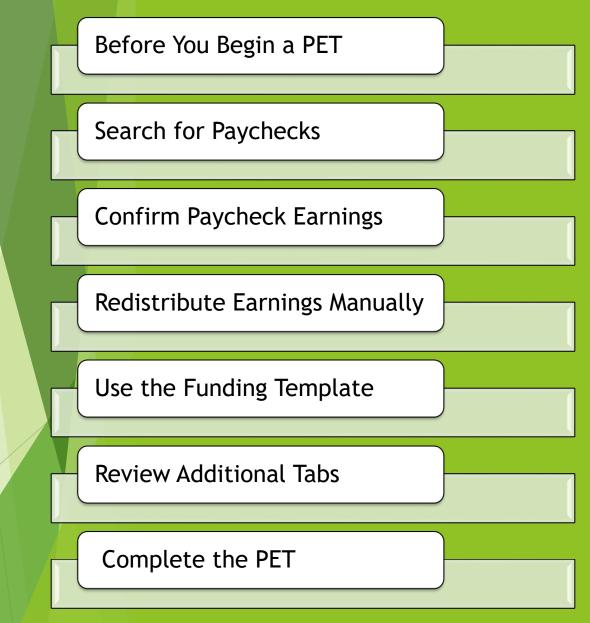
Payroll Expense Transfers

HCM HRGL Webinar Employee Services

April 29, 2020 3 - 4 pm Payroll Expense Transfers: Today's Topics



Before You Begin

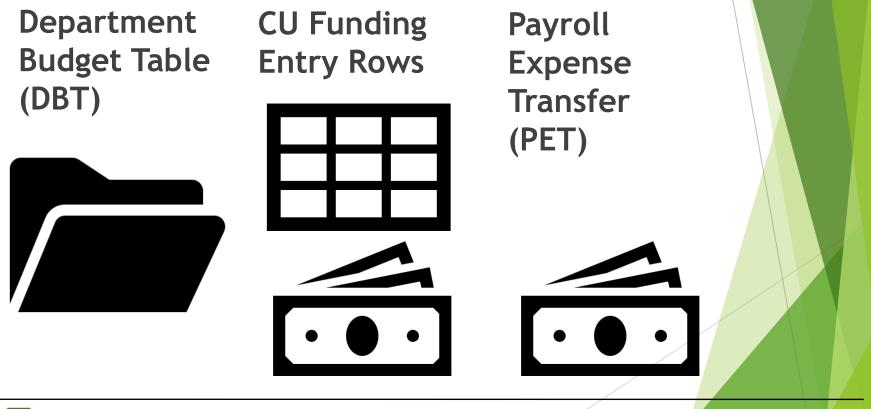
- Download the Step-by-Step Guide
- Why Update Funding After Payroll?
- Prepare Updated Funding

//////.cu.cu.du/uoc/	<u>pet-data-mappdf</u>		
OME		HCM: PET Data Page Map https://www.cu.edu/doc	
Document Libi	rarv	<u>/pet-data-mappdf</u>	
PET	Departm	nent ~	
ALL A B C D E W X Y Z	F G H I J K	L M N O P Q R S T U V	
DOCUMENT NAME	ТҮРЕ	DEPARTMENT	
Funding Entry		HCM Community	
Managing Funding Suspense		HCM Community	



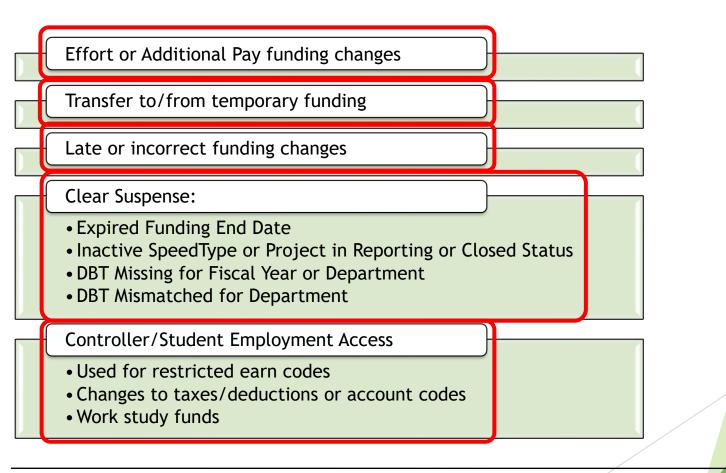
Position Funding & Payroll

Funding is required for each active position with an incumbent. It specifies how payroll posts earnings, taxes and deductions to the general ledger. After payroll processes, use a PET.



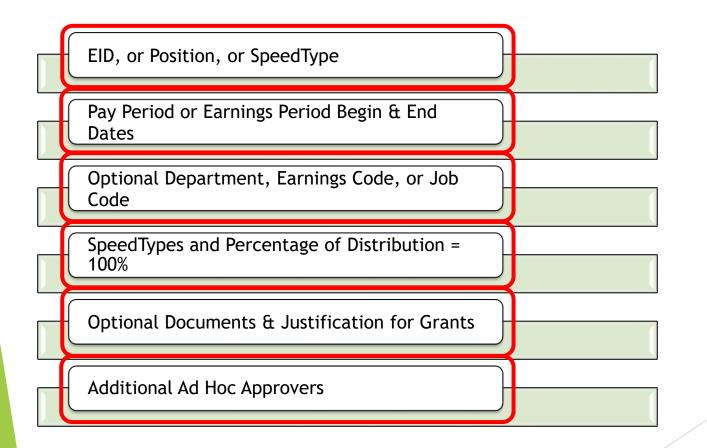


Why Update Funding After Payroll?





Prepare Updated Funding



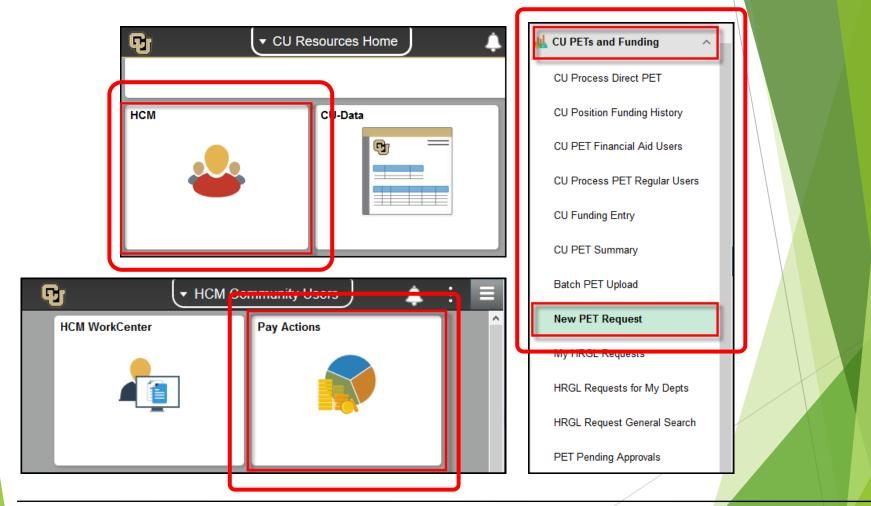


Search for Paychecks

- Navigate to the PET Page
- Search for Paychecks
- Choose Paychecks to Update
- System Checks



Navigate to the HCM PET Page





Create a New PET

Payroll Expense Transfer	Â	↓ : ≡	
Payroll Expense Transfer Enter any information you have and click Search. Leave fields blank for a list of all values.		New Window Help	
Find an Existing Value Add a New Value			
Search by: HRGL Request # v begins with			
Search Advanced Search			



QRG: PET Map - Paycheck Search

https://www.cu.edu/doc/pet-data-mappdf

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Paycheck Search Criteria & Results

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HRGL Request #:	Status: Searched/Draft	Originator: McCoy	Catherine Louise
Submitted:	Submitted by:	Created: 04/26/	20 10:16PM
Completed:		Last Update:	_
Paycheck Search Criteria		Find N	/iew All First 🛞 1 of 1 🕑 Last
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<u>م</u>	Q		Q
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Date	Include Off-Cycle?: 🗹 Search	for Paycheds	
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Ad Hoc Department Approvers (If N	eeded)		



Paycheck Search Criteria

Paycheck Search Criteria	OR	Position Number*	OR	Find View All SpeedType*	First 🕚
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	04/30/2018	03/31/2018		155950	0	30063	00652347	1310	F12	3,871.22	833.06	536.53
	04/30/2018	04/30/2018		155950	0	30063	00652347	1310	F12	3,871.22	833.06	536.53
	05/31/2018	05/31/2018		155950	0	30063	00652347	1310	F12	3,871.22	833.06	536.53
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Paycheck Search May Paycheck - Single Line

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Selected	Pay End Date	Earnings End Date	Off Cycle	Empl ID	Empl Rcd#	Department	Position Number	Job Code	Pay Group	Total Earnings	Total Taxes	Total Deductions
	04/30/2018	03/31/2018		155950	0	30063	00652347	1310	F12	3,871.22	833.06	536.53
	04/30/2018	04/30/2018		155950	0	30063	00652347	1310	F12	3,871.22	833.06	536.53
	05/31/2018	05/31/2018		155950	0	30063	00652347	1310	F12	3,871.22	833.06	536.53



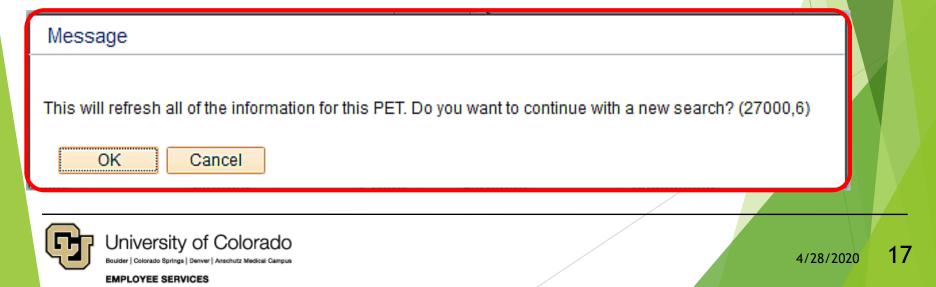
Paycheck Search April Paycheck - Multi Line

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Earnings	Begin Date	Earnings End Date		Off-Cycle?:		Searc	ch for Payche	ecks	Job	Code		
Select A	All Ui	n-Select All					⊠ Sen	d Notificati	on Email	s to Originator		
Paycheck	Search Res	ults				Pe	rsonalize	Find View	All 🗖	🔣 First	🕚 1-3 of	3 🕑 Last
Main /	Addi Info								-			
Selected	Pay End I	Date Earnings End	Off Cycle	Empl ID	Empl Rcd#	Department	Position Number	Job Code	Pay Group	Total Earnings	Total Taxes	Total Deductions
	04/30/20	18 03/31/2018		155950	0	30063	00652347	1310	F12	3,871.22	833.06	536.53
	04/30/20	18 04/30/2018		155950	0	30063	00652347	1310	F12	3,871.22	833.06	536.53
	05/31/20	18 05/31/2018		155950	0	30063	00652347	1310	F12	3,871.22	833.06	536.53



Paycheck Search System Checks

Paycheck Search Cr	Message
Empl ID* AZR Pay Begin Date	Invalid value press the prompt button or hyperlink for a list of valid values (15,11) The value entered in the field does not match one of the allowable values. You can see the allowable values by pressing the Prompt button or hyperlink.
Earnings Begin Date	OK

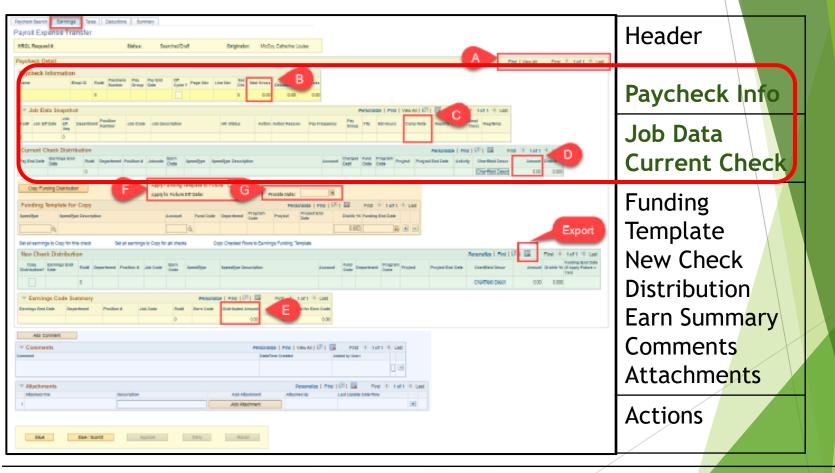


Confirm Paycheck Earnings

- Paycheck Information
- Job Data Snapshot
- Current Check Distribution
- Compare with Search Results

QRG: PET Map - Earnings Tab

https://www.cu.edu/doc/pet-data-mappdf





Confirm Paycheck Earnings

Paycheck Search Earnings Taxes Deductions Summary	
Payroll Expense Transfer	
HRGL Request #: Status: Searched/Draft Originator: McCoy, Catherine Louise	
Paycheck Detail	Find View All First 🕘 1 of 2 🕑 Last
Paycheck Information	Scroll through the paychecks in
Name Empl ID Rod# Paycheck Pay Pay End Off Cycle Page Nbr Line Nbr Sep Total Total Total	the PET if more than one.
Name Empl ID Rod# rayelieux ray cut Cycle Page Nbr Line Nbr Sep Total To	and the third that one.
Davis,Aaron 155950 0 6672722 F12 04/30/2018 1320 6 0 3,871.22 536.53 833.06	
▼ Job Data Snapshot	First ④ 1 of 1 ④ Last
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04/30/2018 03/31/2018 0 30063 00652347 1310 VAC 62943301 PELE Auxiliary 400500 223.34 04/30/2018 04/30/2018 0 30063 00652347 1310 RGS 62943301 PELE Auxiliary 400500 223.34	4 100.000 4 100.000
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SpeedType SpeedType Description Account Fund Code Project Project End Date Distrib % Funding End Date	
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Set all earnings to Copy for this check Set all earnings to Copy for all checks Copy Checked Rows to Earnings Funding Template	
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03/31/2018 0 30083 00652347 1310 SCK 62943301 Q PELE Auxiliary 400500 Q	223.34 100.000 関 💌 🖃
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04/30/2018 0 30083 00652347 1310 RGS 62943301 Q PELE Auxiliary 400500 Q	3,424.54 100.000 😝 🛨 🖃





Paycheck Info, Job Data Snapshot, & Current Check Distribution

Paycheck	Detail																	
Paychec	k Inform	ation																
Name		E	impl ID	Rcd#	Payche Numbe		ay P roup D	Pay End Date	Off Cycle	Pag	e Nbr	Line N	br Sep Chl		Total Gross	Deduc	Total tions	Total Taxes
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0 7/01/2	2017 2	30063	0065234	17 310	Prof	essional	Researc	ch Asst 🛛 A	ctive	PAY	PTC	I	M	F1	2 0.8	00000 32	2.00 \$	3,871.220000
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04/30/2018	03/31/2018	0	30063	00652347	' <mark>1</mark> 310	VAC	62943301	1 PELE Au	xiliary				400500				223.3	4 100.000
04/30/2018	04/30/2018	0	30063	00652347	310	RGS	62943301	1 PELE Au	xiliary				400500				3,424.	4 100.000



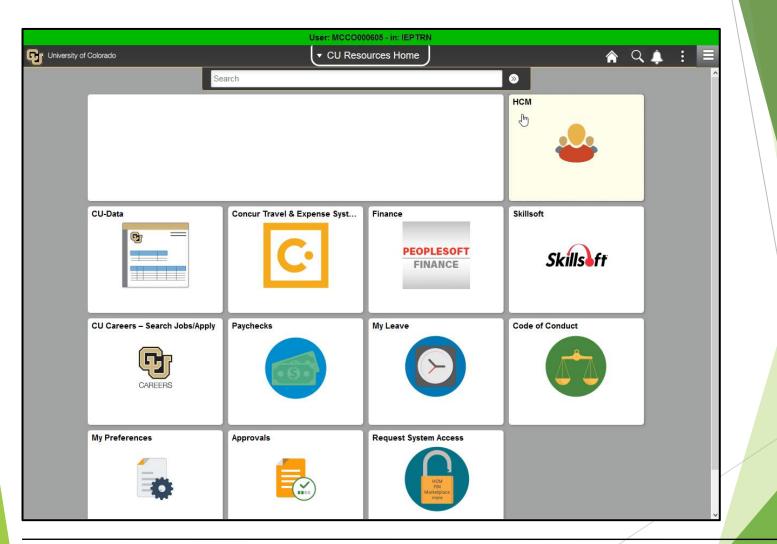
Paycheck Partial Earnings

Payche	eck Sea	arch	Earnings	Taxes	Dedu	uctions	Sun	nmary										
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		04/3	0/2018	03/31/	2018		1	55950	0	30063	00652347	1310	F12	3	3,871.22	83	3.06	536.53
2		04/3	0/2018	04/30/2	2018		1	55950	0	30063	00652347	1310	F12	3	3,871.22	83	3.06	536.53
2		05/3	1/2018	05/31/2	2018		_ 1	55950	0	30063	00652347	1310	F12	3	3,871.22	83	3.06	536.53
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Paycheck Search - Watch It





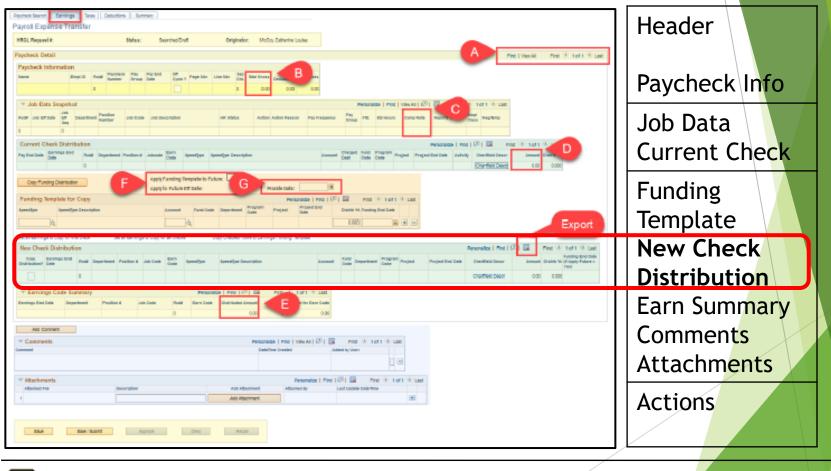
Redistribute Earnings

- Manual Overwrite
- Distribution = 100%
- Amount vs Distrib %
- System Checks



QRG: PET Map - Earnings Tab

https://www.cu.edu/doc/pet-data-mappdf





25

New Check Distribution

						_																
lycheck Sear		-	Taxe	s Dedu	ctions	Summary																
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-																		Find (VIEW AII	Filst @	101	2 🔍
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Rcd# Job Eff		Depar		Position Number	Job Code	Job Desc	ription		HR St	atus	Action	Action Reason	Pay Frequenc	y Pay Group	FTE	Std Hours	Comp Rate	Report	s To Em Cla	pl Reg/Ten	пр	
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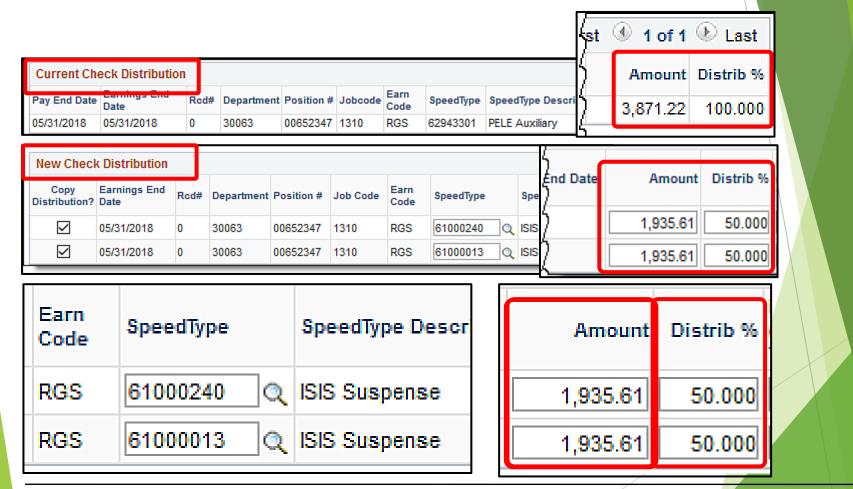
Overwrite Funding Details Add 🖬 and Delete 🖃 Rows

New Check	k Distribution	J						
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	03/31/2018	0	30063	00652347	1310	SCK	62943301 Q	PELE Auxiliary
	03/31/2018	0	30063	00652347	1310	VAC	62943301 Q	PELE Auxiliary
	04/30/2018	0	30063	00652347	1310	RGS	62943301 Q	PELE Auxiliary

	Personalize Find 🖾 🎚 First 🕚 1-3 of 3 🕑 Last													
Account	Project	Project End Date	Amount		Funding End Date if Apply Future = 'es)									
400500 Q			223.34	100.000		+ -								
400500 Q			223.34	100.000		+ -								
400500 Q			3,424.54	100.000		+ -								



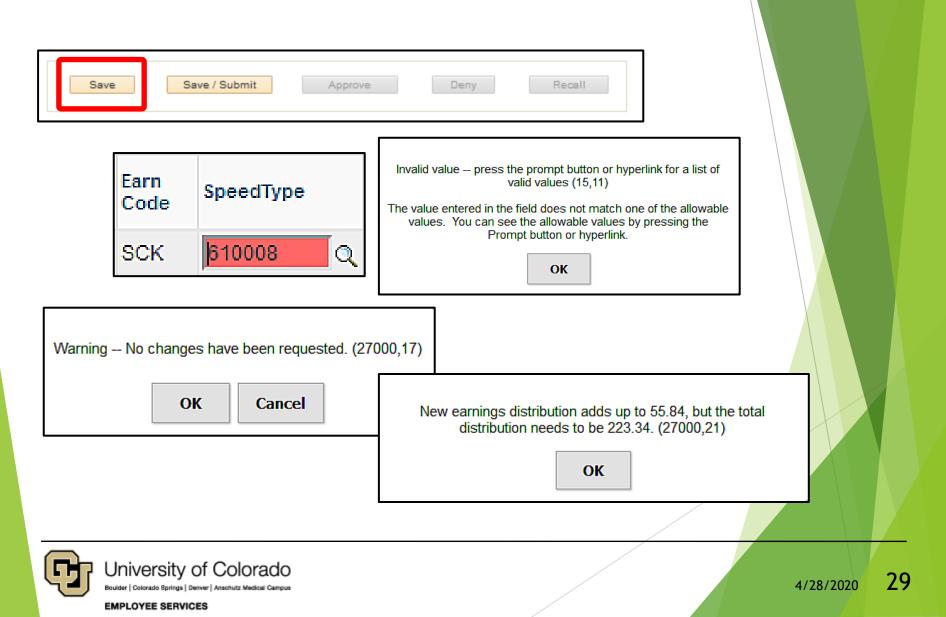
Percent Distribution = 100% Amount vs Distrib %





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SAVE & System Checks



Manual Update - Watch It

Paycheck Search					Pa	yroll I	Expense 1	Transfer	r _		MCCO000	05 Database	: HCMTRN	4	۹ ۱	:	
heck Search Earnings Taxes	Deductions Sum	nary											N	ew Window	/ Help P	ersonaliz	e Page
ayroll Expense Transfer			in Aid / Con	trollere:	Benefit	e Overrie	te:	Tin Aid	/ Controllers	0.45							
IRGL Request #:	Status:		hed/Draft	trollers, E		inator:			/ Controllers	Office							
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aycheck Search Criteria							Find View	All First	🕚 1 of 1 🕚	Last							
Empl ID* 155950 Q Davis,Aaron	Posi	ition Numb				Sp	eedType*		Q								
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04/01/2018 🛐 05/31/2018 👔			Q				্										
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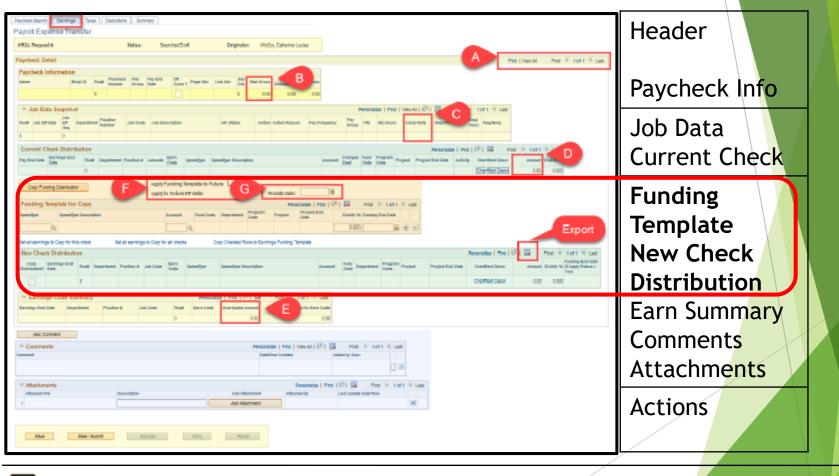
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Use the Funding Template

- Update Funding Using the Template
- Apply to Future Funding

QRG: PET Map - Earnings Tab

https://www.cu.edu/doc/pet-data-mappdf





Funding Template for Copy

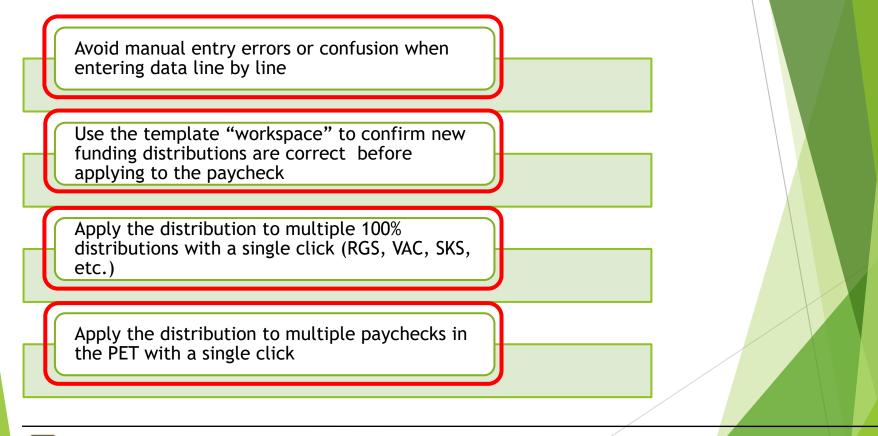
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Why Use the Template?

Template applies a new funding distribution (@ 100%) to selected sections of the paycheck.



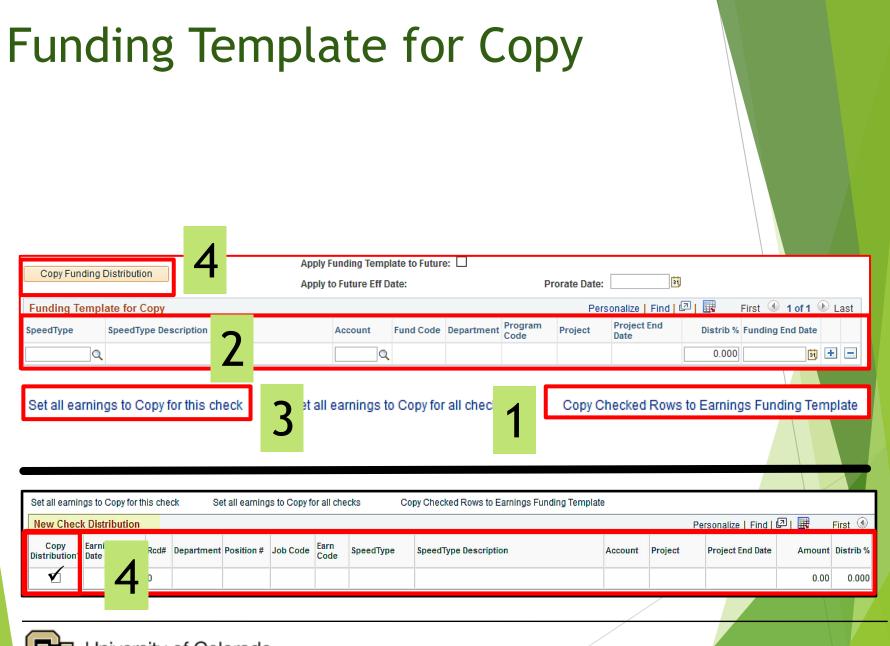


Example of New Distribution

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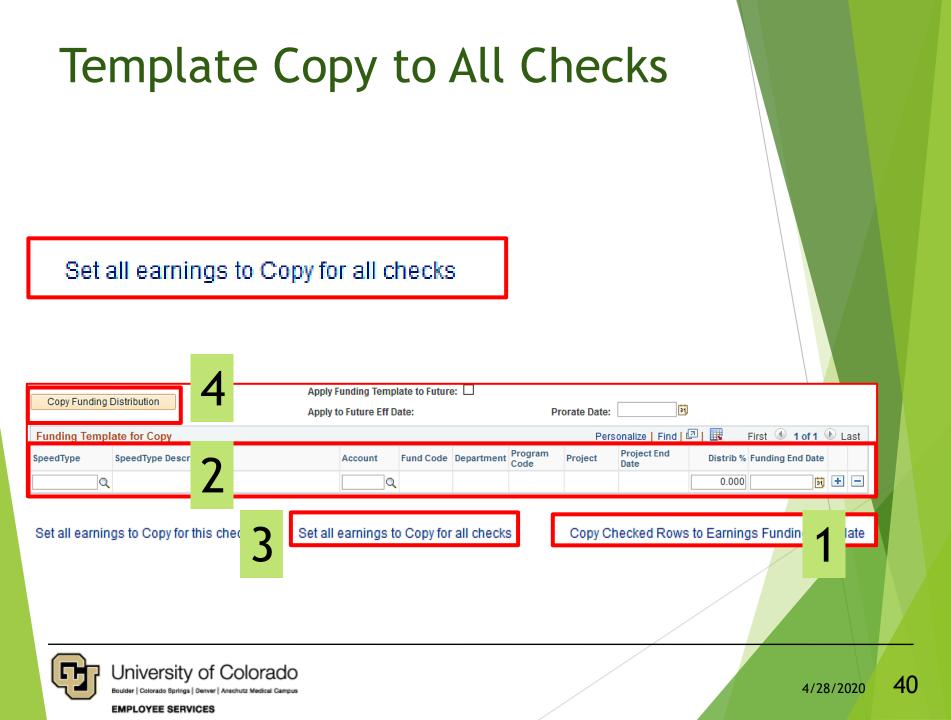
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Funding Template - Watch It

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Review Additional Tabs

- Review Deductions and Taxes
- Save and System Checks
- Grants Questionnaire
- Review Summary Page

QRG: PET Map - Taxes

https://www.cu.edu/doc/pet-data-mappdf

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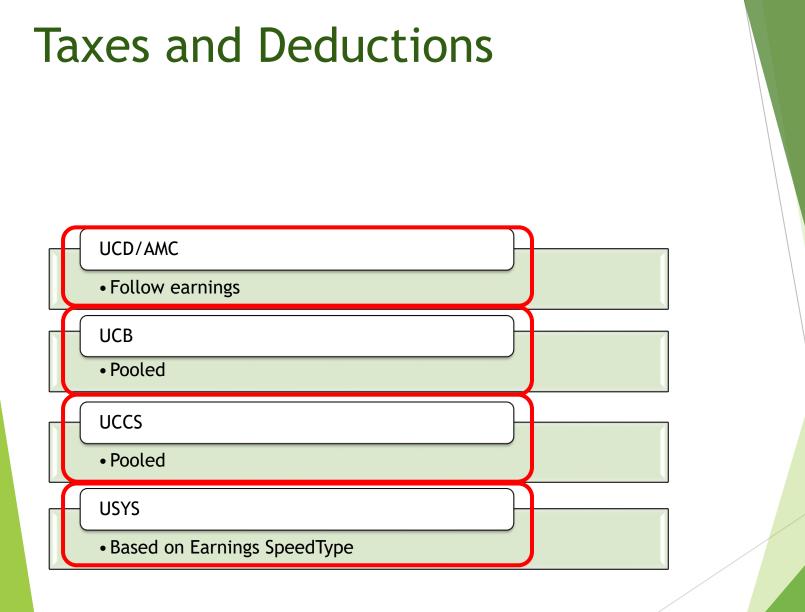
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Funding Template for Copy									Personaliz				st 🕚 1 o	f 1 🕑 La	st							
SpeedType SpeedType Desc	iption			Departme	ent Projec	t Accou	unt Coo	id Progra de Code	am PC Bus Unit Act	ivity Da	nding End te		roject End ate	Distrit	9%							
														0.0	000							
Copy Funding Distribution																						
New Check Distribution																		Pers	onalize Fin	d 💷 🗄	Firs	st 🕘 1
Copy Earnings End Distribution? Date Re	d# Depart	ment Position	# Job Co	e State T	fax Class	SpeedType		SpeedTyp	e Description		Account		und De	partment	Program Code	roject	Project E Date	nd	artfield Des		Amount	Distrib %
05/31/2018 0	30063	0065234	7 1310	SU (DASDVER	61000009		Gen Infra	istr Recharge-(IR-DC	418730	10	30	276	49035			Cha	rtfield Descr		60.02	25.000
05/31/2018 0	30063	0065234	7 1310	SU (DASDVER	61000074		CSPH-De	an's Office		418730	10	21	411 (49846			Cha	rtfield Descr		180.07	75.000
05/31/2018 0	30063	0065234	7 1310	\$U I	MEC/ER	61000009		Gen Intra	Istr Recharge-C	IR-DC	418734	10	30	276	49035			Cha	rtfield Descr		14.04	25.000
05/31/2018 0	30063	0065234	7 1310	SU I	Med/ER	61000074		CSPH-De	an's Office		418734	10) 21	411	49846			Cha	rtfield Descr		42.11	75.000
Tax Class Summary						Persona	ilize Fin	d 🖾 🛙	🛛 🛛 First 🔇	1-2 of	2 🕑 Last											
Earnings End Date Departm	nt Pos	ition # Jot	o Code	Rcd#	State	Tax Class	1	Distribute Amour			Total for Tax Class											
05/31/2018 30063		52347 131		0	SU	OASDVER		240.0			240.09											
05/31/2018 30063	006	52347 131	10	0	SU	Med/ER		56.1	5 100.00	00	56.15											
L																						



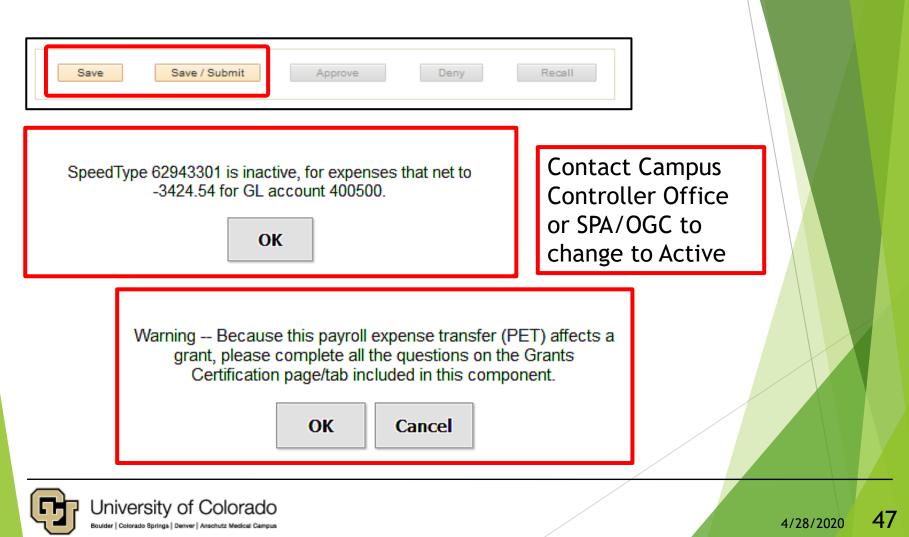
Jniversity	of	Colorado
ouider Colorado Springs	Denver	Anschutz Medical Campus







SAVE & System Checks



EMPLOYEE SERVICES

Grant Certification

Paycheck Search Earnings Taxes Deductions Grant Cert >= 180 Summary
Payroll Expense Transfer
HRGL Request #: MCCO000605-20200428-001 Status: Searched/Draft Originator: McCoy, Catherine Louise
Grants Certification Questions
Please provide sufficient reason for submitting this Payroll Expense Transfer (For example: the cause of the error, how this PET corrects the error
and reflects the actual effort the employee(s) spent on the sponsored project(s), etc.). Attach any relevant back up documentation.
Reducing ST63016083 from 83% to 0% and increasing ST63018232 from 0% to 83% for the period of 01/01/2019 - 04/30/2019 to properly reflect effort on all projects.
To the best of my knowledge, the charge is allowable, allocable, and provides direct benefit to the project receiving the charge.
Yes O No
Please explain why the submission of this Payroll Expense Transfer is occurring after 90 days. Speedtype was refunded recently. The PI held the salary on the closing CMS Operations SpeedType pending new funding of the speedtype.



QRG: PET Map - Summary

https://www.cu.edu/doc/pet-data-mappdf

Payche	eck Search Ea	arnings Taxes	Deductions	Summar	1															
Payr	oll Expens	e Transfer																		
HRG	L Request #:		St	atus:	Searched/0	Draft	Or	ginator: N	McCoy, Cathe	rine L	pulse									
-	PET Combina	tion Summary	1		Person	alize Find	Ø 🔣	First 🛞	1of1 🛞	Last										7
Spee			Earnings		Deductions		Taxe	s		Total										
			0.00		0.00		0.0	0		0.00										
-	PET Combina	tion Detail Su	mmary			Personali	ze mina	Ø i 🖪	minst @	1.01	1. © тая	a l								
Type		Amount Sp			Account	Descriptio		1									Fx	port		
		0.00																		
$ \Psi $	PET Detail												Per	sonalize F	Find 💷		First	🕘 1 of	1 ® L	ast
Type	Ernod/Dedod/Tex	Amount	speedtype	Account	Cheok Nbr	Pay End Date	Empl ID	Employee Nan	me	Co	Pay Group	EE Rod#		Position #		Off Cycle ?	Page Nbr		Sep Deb Chk Cre	
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ayched	k Search Eaming	gs Taxes Deduc	tions Summary																	
-																				
													/							
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Summary Tab

EMPLOYEE SERVICES

Payroll Expense				
	CC0000605-20200426-002 Status:	: Searched/Dr	aft Originator:	McCoy, Catherine Loi
INCE Request #. M	CC0000005-20200420-002 Status.	Scarchearbh	an originator.	meeby, catherine Lo
PET affects the fo	ollowing employees:	1100		
PET Summaries are ac	ccurate upon completed status. Prior to o	completion totals can	be verified using the New Check (Distribution table on the
earnings/taxes/deduct		sompletion, totale earl	be remote doing the new encode	
PET Combination	on Summary	Persona	lize Find 💷 🔣 🛛 First 🚳	1-3 of 3 🛞 Last
SpeedType	Earnings	Deductions	Taxes	Total
61000009	967.80	470.86	74.06	1,512.72
61000074	2,903.42	1,412.56	222.18	4,538.16
62943301	-3,871.22	-1,883.42	-296.24	-6,050.88
🔻 PET Combinatio	on Detail Summary		Personalize Find 💷 🔣	First 🐠 1-24 of 24
Туре	Amount SpeedType	Account	Description	
ERN	967.80 61000009	400500	Gen Infrastr Recharge-GIR-DC	
ERN	2,903.42 61000074	400500	CSPH-Dean's Office	
ERN	-3,871.22 62943301	400500	PELE Auxiliary	

Summary Tab

▼ P	ET Detail									Pers	onalize Fir	nd 🖓 🔳	Fi	rst 🕚	1-8 0	f 8 🔮	Last
Туре	Erncd/Dedcd/Tax	Amount	SpeedType	Account	Check Nbr	Pay End Date	Co	Pay Group	EE Rcd#	Dept ID	Position #	Job Code	Cycle ?	Page Nbr	Line Nbr		Debit/ Credit
ERN	RGS	-1,399.75	11077039	400715	6068733	01/31/2017	CU	MON	1	10839	00665498	1433		2067	1	0	С
ERN	RGS	1,399.75	61000074	400715	6068733	01/31/2017	CU	MON	1	10839	00665498	1433		2067	1	0	D
ERN	RGS	-1,399.75	11077039	400715	6109345	02/28/2017	CU	MON	1	10839	00665498	1433		2183	2	0	С
ERN	RGS	1,399.75	61000074	400715	6109345	02/28/2017	CU	MON	1	10839	00665498	1433		2183	2	0	D
ERN	RGS	-1,399.75	11077039	400715	6151863	03/31/2017	CU	MON	1	10839	00665498	1433		1757	1	0	С
ERN	RGS	1,399.75	61000074	400715	6151863	03/31/2017	CU	MON	1	10839	00665498	1433		1757	1	0	D
ERN	RGS	-1,399.75	11077039	400715	6192946	04/30/2017	CU	MON	1	10839	00665498	1433		1189	2	0	С
ERN	RGS	1,399.75	61000074	400715	6192946	04/30/2017	CU	MON	1	10839	00665498	1433		1189	2	0	D

Ty 🔻	Erncd/Dedcd/T 🔻	Amoul 🔻	SpeedTy 🔻	Accou 🔻	Check N 🔻	Pay End Da 🔻	Ŧ	Pay Gro 🔻	EE Rc 🔻	Dept 🔻	Positio 🔻	Job Co 🔻	Off Cycle 🔻	Page N 🔻	Line N 🔻	Sep C 🔻	Debit/ Cre 🔻
ERN	RGS	-1,399.75	11077039	400715	6068733	1/31/2017	CU	MON	1	10839	665498	1433	N	2067	1	0	с
ERN	RGS	1,399.75	61000074	400715	6068733	1/31/2017	CU	MON	1	10839	665498	1433	N	2067	1	0	D
ERN	RGS	-1,399.75	11077039	400715	6109345	2/28/2017	CU	MON	1	10839	665498	1433	N	2183	2	0	С
ERN	RGS	1,399.75	61000074	400715	6109345	2/28/2017	CU	MON	1	10839	665498	1433	N	2183	2	0	D
ERN	RGS	-1,399.75	11077039	400715	6151863	3/31/2017	CU	MON	1	10839	665498	1433	N	1757	1	0	С
ERN	RGS	1,399.75	61000074	400715	6151863	3/31/2017	CU	MON	1	10839	665498	1433	N	1757	1	0	D
ERN	RGS	-1,399.75	11077039	400715	6192946	4/30/2017	cu	MON	1	10839	665498	1433	N	1189	2	0	С
ERN	RGS	1.399.75	61000074	400715	6192946	4/30/2017	cu	MON	1	10839	665498	1433	N	1189	2	0	D



Additional Tabs - Watch It

		Payroll Expense T	ransfer	MCC0000605 Database: HCMTRN	
				New Window Help Personalize Page	
Paycheck Search Earnings Taxes	Deductions Summary				
Payron Expense Transfer	Fin Aid / Control	ollers: Benefits Override: Fin Aid / Co	ntrollers Office		
HRGL Request #: MCCO000605-202004	130-001 Status: Searched/Draft	Originator: McCoy, Catherine Louise			
Submitted:	Submitted by:	Created: 04/30/20 12:34AM	Û		
Completed:		Last Update: 04/30/20 12:38AM			
Paycheck Search Criteria		Find View All First 🛞	1 of 1 🛞 Last		
Empl ID*	Position Number*	SpeedType*			
155950 Q Davis,Aaron	Q		2		
Pay Begin Date Pay End Date 04/01/2018 05/31/2018		Empl Record # Department			
Earnings Begin Date Earnings End		Job Code			
Date		for Paychecks			
Select All Un-Select All		Send Notification Emails to Originator			
Paycheck Search Results	Persona	nalize Find View All 🖓 🔢 💿 First 🕚 1-3 of 3 🕚	Last		
Main AddI Info Pay End Earnings En	d Off Faral ID Empl Davatariat Pos	osition Job Pay Total Total Total	Total		
Selected Date Date	Cycle Empl ID Rcd# Department Num	umber Code Group Earnings lotal laxes Dedu			
04/30/2018 03/31/2018 04/30/2018 04/30/2018			536.53		
04/30/2018 04/30/2018 05/31/2018 05/31/2018			536.53 536.53		
		3,571.22 55.55	000.00		
Ad Hoc Department Approvers (If	Needed)				
Department Approver 1					
Empl ID:					
Department Approver 2					
Empl ID:					
Department Approver 3					
Empl ID:					X
▼ Attachments		Personalize Find	First 🚯 1 of 1 🕑 Last		
Attached File	Description	Add Attachment Attached By	Last Update Date/Time		
1		Add Attachment	+		
Add Comment					
▼ Comments		Personalize Find View All 💷 🖩	First 🛞 1 of 1 🛞 Last		
Comment		DateTime Created A	dded by User		
					v
					7



Complete the PET

- Conclude with Paycheck Search Page
 - CU PET Header Panel & Status
 - Delete the Entry
 - Add Comments & Attachments
 - Events and Actions
- Workflow and Final Post to GL

QRG: PET Map - Paycheck Search

https://www.cu.edu/doc/pet-data-mappdf

Prigrad Expendent California Liferio de la contra contra la contra Contrante Offen India, Anganelite, al contra contra Summiter, submitter de Contra contra Companier, contra con	Header	
Notice State Control Partice State Control Partice State Control Partice State State Partice State Control Partice State State Partice State Control Partice State Partice State Control Partice State Partice State Control Partice State Partice State Par	Paycheck Search & Results	
Jad Noc Department Approver v di Sendedi Department Approver 1 Empiriment Approver 2 Impi ter	AD HOC Approvers	
Addresses	Attachments Comments	
Town Drasting Presentate 1 Proc (result 1 M) (all Proc	Events Actions	

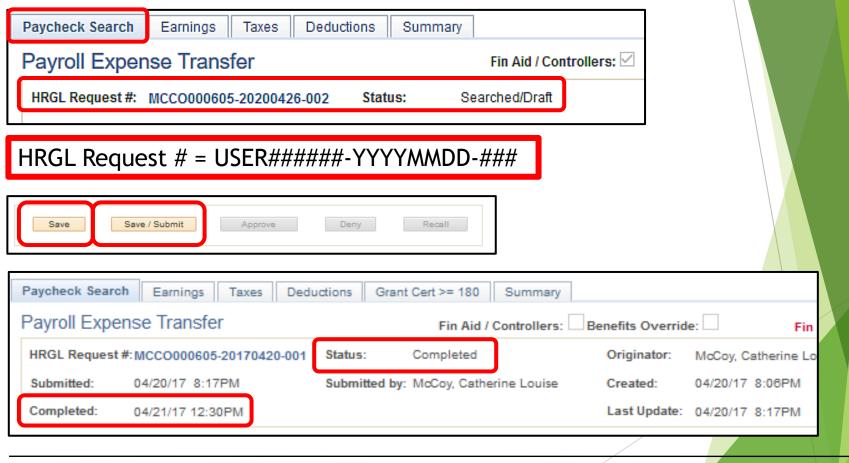


Header, Ad Hoc, Attachments, Comments, Event Tracking

	Deductions Summary						
Payroll Expense Transfer		Fin Ald / Cont	rollers: Benef	its Override:		Fin Ald / Con	trollers Office
HRGL Request #:	Status:	Searched/Draft	0	riginator:	McCoy, Catheri	he Louise	
Submitted:	Submitted by:		C	reated:	04/26/20 11:27P	м	ŝ
Completed:				st Update:			
had made and have the address the	all - I am the address of the	- Annahand	and a strend the second	cure a	and the states	and making	mand and
Ad Hoc Department Approvers (If Needed)							
Department Approver 1							
Empl ID:							
Department Approver 2							
Empl ID:							
Department Approver 3							
Empl ID:							
Attachments				Persor	nalize Find 🗖	First 🕚	1 of 1 🕑 Last
	escription		ld Attachment	Attached By		Update Date/Time	
1		Ac	ld Attachment				•
Add Comment							
✓ Comments			Personalize DateTime	Find View		First 🕙 1 of 1 🕭 by User	Last
Event Tracking Event Date/Time Event	Personalize Find View User Name		t 🕚 1 of 1 🕑 Last Details (if applicable)				
	user name	Ad Ho	, perans (n'applicable)				
Save Save / Submit	Approve	Deny	Recall				

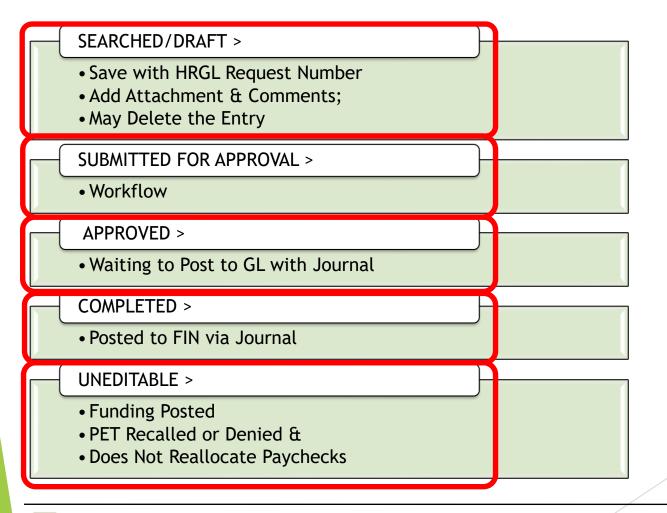


Paycheck Search - Header





PET Status





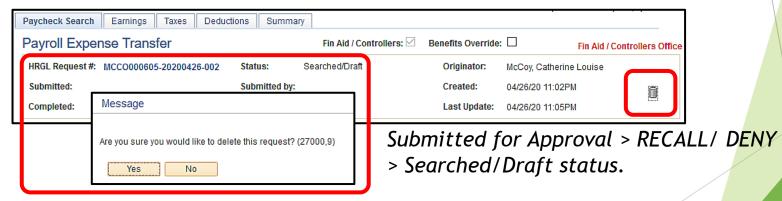
Delete a PET

A PET can be deleted in Searched/Draft status.

• Before SAVE, simply abandon the PET.

Paycheck Search	Earnings	Taxes	Deductions	Summary						
Payroll Expens	e Transfei	r		trollers: Be	enefits Overrid	le: 🔲 🛛 F	in Aid / (Controllers Offic		
HRGL Request #:			Status	: Sea	rched/Draft		Originator:	McCoy, Catherine	Louise	
Submitted: Submitted by:					Created:	05/21/19 3:41PM		î		
Completed:							Last Update:			3

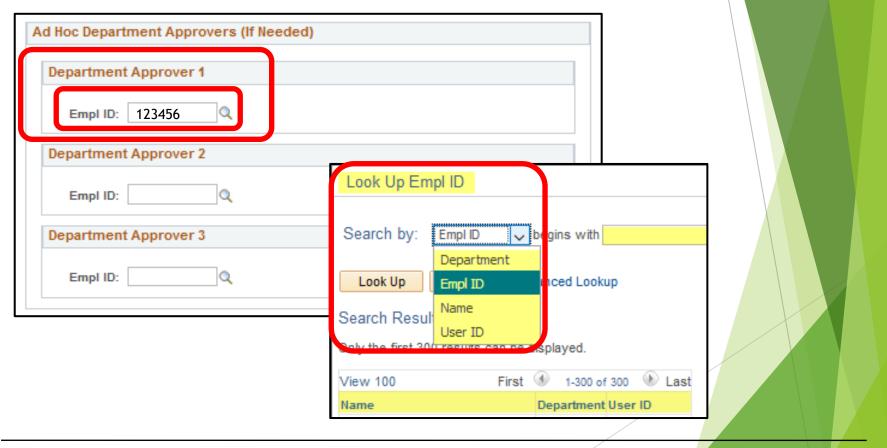
• After SAVE, (HRGL Request # assigned), click the Trash Can.



• If in APPROVED/COMPLETD status, a new PET is required.



Paycheck Search -Ad Hoc Approvers





Attachments & Comments

Attachments				Personalize	e Find 🖓 🔢 🛛 F	First 🕚 1 of 1 🍕	Last
Attached File	Description	A	dd Attachment	ttached By	Last Update Dat	te/Time	
1		Ac	dd Attachment				•
Add Comment							
Comments			Personalize F	ind View All	🕗 🔜 💿 First 🕚 1	1 of 1 🛞 Last	
Comment			DateTime Ci	reated	Added by User		
Attachments				D,	rronalize Find 🖉	🛛 🔣 🛛 First	🕚 1-2 of 2 🛞 Last
Attached File	Description		View Atta	chment	ttached By	Last Updat	e Date/Time
1 Delson_SCD_Samantha_Mawhinney	y3_(002).xlsx		View Attac	chment	IcCoy, Catherine	04/20/17	8:14:43PM
2 PET_Delson_m- Fin_COMPENSATION_SUMMARY.p	df		View Attac	chment	IcCoy, Catherine	04/20/17	8:15:06PM
Add Comment							
Comments			Persona		/iew All 🖾 🔜	First 🕚 1 of	1 🧐 Last
Comment				DateTime Crea	ated A	dded by User	
Delson's funding on Bridge for Aug/Sep 3 project. The speedtype was delayed in a the salary on 61001341 to 63009631. Cl	creation/being communicated to the			04/20/17 8:1	0:15.00000PM N	/IcCoy, Catherin	e Louise





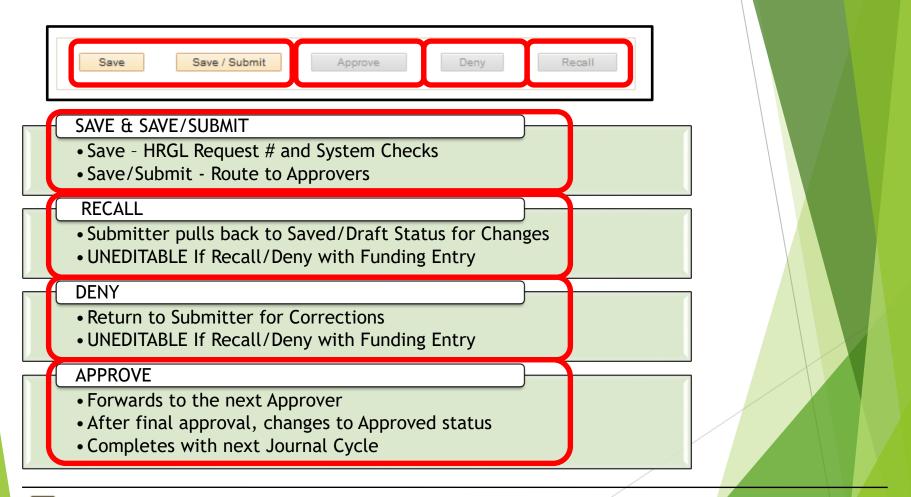
PET Event Tracking

Tevent Tracking	Personalize	Find View All 💷 🔣	First 🐠 1-5 of 6 🛞 Last
Event Date/Time	Event	User Name	Ad Hoc Details (if applicable)
04/21/17 12:30:42PM	Completed	CU Production Service System	
04/21/17 9:53:34AM	Approved	Mays, Shanelle Vee	
04/21/17 8:23:50AM	Approved	Alvarado, Crystal	
04/20/17 8:17:38PM	Submitted for Approval	McCoy, Catherine Louise	
04/20/17 8:13:04PM	Saved	McCoy, Catherine Louise	_

Event Tracking	Personalize	Find View All 💷 🔣	First 🚯 1-4 of 4 🛞 Last
Event Date/Time	Event	User Name	Ad Hoc Details (if applicable)
11/02/17 5:44:54PM	Denied	Hemphill,ShouJiao	
10/20/17 2:03:29PM	Dept Budget Tables Updated	Yoon,Patrick C	
10/20/17 2:03:26PM	Submitted for Approval	Yoon, Patrick C	
10/20/17 2:03:03PM	Created	Yoon,Patrick C	



PET Actions







Deny or Recall & Funding Update

Copy Funding	Apply Funding Template to Future:Apply to Future Eff Date:10/08/2017					
Funding Temp	late for Copy					
SpeedType	SpeedType Description		Account	Fund Code	Department	Program Code

	ige 2: Grants	••					
	CU_HRG	L_ID=YOO	000075-20171020-01	2:Denied			
	Boulder Grants App	rover					
	Denied		Event Tracking		Personalize		
	Boulder Gran	ts Approver	Event Date/Time	Event	l		
	11/02/17 - 5 :4	44 PM	11/02/17 5:44:54PM	Denied			
			10/20/17 2:03:29PM	Dept Budget Tables (Dept Budget Tables Updated		
			10/20/17 2:03:26PM	Submitted for Approv	al		
			10/20/17 2:03:03PM	Created			
ycheck S	earch Earnings	Taxes D	eductions Grant Cert < 9	0 Summary			
yroll E	Expense Trans	sfer		Fin Aid / Controllers:	Benefits Override:		
GL Requ	iest#:		Status: Une	ditable	Originator:		



Campus Workflow

Bouider | Colorado Springs | Denver | Anschutz Medical Campus

EMPLOYEE SERVICES

	Campus	FF - Fund	10, 20, 80	30, 31	34, 35					
	UCB	1FF#####	Self	SPA	Self					
	AMC	2FF#####	Self	OGC	OGC					
	UCD	6FF#####	Self	OGC	OGC					
	UCCS	4FF#####	Self	SPA	Self					
– (-	nt Approvers	5-20170420-001	1:Approved						
	oved Alvarado, Cryst Department Appr 04/21/17 - 8:23 A	al over 1	je 2: Grants	••	00605-201704	20-001:Approved				
Denver/Ansch Grants Approver Approved Mays, Shanelle Vee Denver/Ansch Grants Approver 04/21/17 - 9:53 AM										
Unive	ersity of Co	lorado		/		64				

4/28/2020

PET Approvers

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<u>ا الا</u> CU PETs and Funding

CU Process Direct PET

CU Position Funding History

CU PET Financial Aid Users

CU Process PET Regular Users

PET Pending Approvals

5				
CU Funding Entry	HRGL Reque	st#	Submittee	d Date Time
CU PET Summary				
Batch PET Upload				
New PET Request		Personalize	Find 💷 📑	First 🕚 1 of 1 🕑 Last
My HRGL Requests	Originator	Submitter		er HR Department
HRGL Requests for My Depts				
HRGL Request General Search				
PET Pending Approvals				





Complete the PET - Watch IT

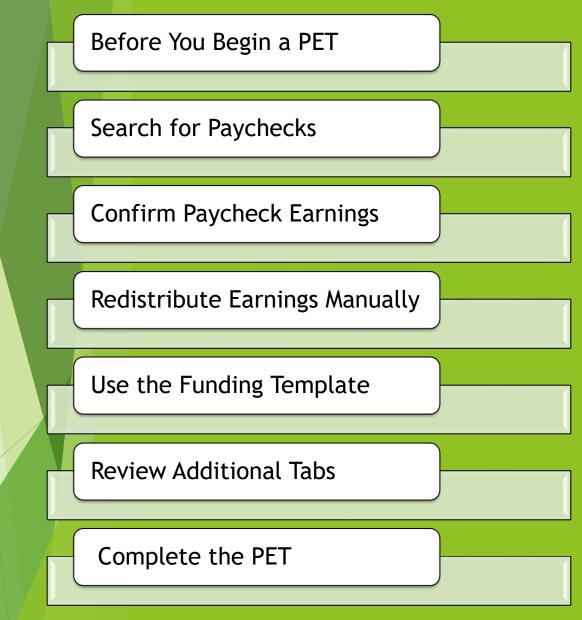
check Sei	rch Earnings	Taxes	Deduction	is Grant	Cert >= "	180 Summ	агу							New Window Help P	ersonalize Page
	pense Trar					Fin Aid / Cor		Benefits	s Overrie	le:	Fin Aid	I / Controllers (Office		
	st #: MCC0000		001	Status:	Sear	ched/Draft		Orig	inator:	McCoy, Cathe					
bmitted:				Submitted	by:			Crea		04/28/20 10:1		0			
mpleted:								Last	Update:	04/28/20 10:4		Î			
check S	arch Criteria									Find View	All First	t 🕑 1 of 1 🛞	Last		
Empl ID*				Posi	tion Nurr	nber*			Sp	eedType*					
155950	Q Davis,	Aaron			0				E			Q			
Pay Begin			Earn Co		loyee Na	me Search	Empl R	ecord #	De	partment					
04/01/201	and the second second	31/2018 🛐		2		Q				Q					
arnings	Begin Date Ear	nings End Date	e Include	Off-Cycle	?: 🗹	Searc	ch for Paych	ecks	Jo	b Code					
							-								
Select All	Un-Sel	ect All					⊻ Ser	d Notifica	tion Em	ails to Originat	or				
aycheck	Gearch Results						Personalize	Find Vie	ew All (계 🔜 🛛 Firs	t 🛞 1-3 o	f 3 🕑 Last			
lain A	di Info														
ected	Pay End Date	Earnings End Date	Off Cycle	Empl ID	Empl Rcd#	Department	Position Number	Job Code	Group	Total Earnings	Total Taxes	Total Deductions			
	04/30/2018	03/31/2018		155950	0	30063	00652347	1310	F12	3,871.22	833.06	536.53			
	04/30/2018	04/30/2018		155950	0	30063	00652347	1310	F12	3,871.22	833.06	536.53			
	05/31/2018	05/31/2018		155950	0	30063	00652347	1310	F12	3,871.22	833.06	536.53			
Hoc Dep	artment Appro	overs (If Need	ed)												
Departm	ent Approver 1														
Empl	ID: 138724	Q Gaffo	ord,Cary												
Departm	ent Approver 2														
Empl	ID:	Q													
Departm	ent Approver 3							1							
Empl	ID:	Q													
	onte												Personalize Find	First 🕢 1 of 1 🖗	k Lost
Attack															Last
Attachn Attached				Descripti	on			View	Attachme		15	elete Attachment	Attached By Last	Update Date/Time	



Header - Con	firm Comple	ted	
Paycheck Search Earnings Taxes Ded	luctions Grant Cert >= 180 Summary		
Payroll Expense Transfer	Fin Aid / Controllers:	Benefits Overrio	de: Fin
HRGL Request #: MCCO000605-20170420-001	Status: Completed	Originator:	McCoy, Catherine Lo
Submitted: 04/20/17 8:17PM	Submitted by: McCoy, Catherine Louise	Created:	04/20/17 8:06PM
Completed: 04/21/17 12:30PM		Last Update:	04/20/17 8:17PM
Save / Submit A	pprove Deny Recall		
PETs are sent to FIN in a The PETs are av	single journal at noon ailable in mFIN the nex	•	n daily.
University of Colorado			4/28/2020

EMPLOYEE SERVICES

Payroll Expense Transfers: Today's Topics



Thanks for joining us.

CU System HR/GL Team <u>hcm-community@cu.edu</u>

HCM HRGL Webinar

