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EMPLOYEE SERVICES

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 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

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2. Correction PET search page displays

☐ Enter one or more of the search fields

☐ Click [Search]

☐ Click on the desired payroll transaction

Correction PET

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

Find an Existing Value

Pay Period End Date:	= ▼		🗓
Paycheck Number:	= ▼		
EmplID:	begins with ▼	129852	
Name:	begins with ▼		

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

Search Results

View All   First ◄ 1-13 of 13 ► La

Pay Period End Date	Company	Pay Group	Off Cycle ?	Page #	Line #	Separate Check #	Paycheck Number	EmplID	Name
01/31/2007	CU	MON	N	3107	5	0	2179999	129852	Berta,Meg:
12/31/2006	CU	MON	N	3208	7	0	2152838	129852	Berta,Meg:
11/30/2006	CU	MON	N	3398	7	0	2125383	129852	Berta,Meg:
10/31/2006	CU	MON	N	3189	7	0	2097542	129852	Berta,Meg:
09/30/2006	CU	MON	N	3177	1	0	2070356	129852	Berta,Meg:
08/31/2006	CU	MON	N	2859	2	0	2046338	129852	Berta,Meg:

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

Correction PET

💾 Save   🔍 Return to Search   ↓≡ Next in List   ↑≡ Previous in List   🔄 Refresh

| EmplID: 129852   Berta,Megan | Pay End Date: 01/31/2007 | Check Dt: 01/31/2007 | Hrs: 184.00 | [Validate] [Cancel] |

*Journal Date: 03/05/2007 🗓   Journal Description: [   ]   [Select All] [Deselect All] [Transfer]

PET Approval (Sponsored Prog)   PET Reports

☐ 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 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."

▽ Earnings

Transfer ?	Earning	Amount	SpeedType	Fund	Org	Program	Project	SubCls	Account	Position	Job	Begin Dt	End Dt	Journal ID	Reference ID	St
☐	ADM	234.60	51045303	10	51007	10007			405100	00508210	H6G3XN	01/01/2007	01/31/2007	PAY0000487		GL
☐	OTM	527.85	51045303	10	51007	10007			405130	00508210	H6G3XN	01/01/2007	01/31/2007	PAY0000487		GL
☐	RGS	4,848.40	51045303	10	51007	10007			405100	00508210	H6G3XN	01/01/2007	01/31/2007	PAY0000487		GL

▷ University Paid Benefits

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

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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**

Correction PET

Save **Return to Search** **Next in List** **Previous in List** **Refresh**

| EmplID: 129852 Berta,Megan | Pay End Date: 01/31/2007 | Check Dt: 01/31/2007 | Hrs: 184.00 | Validate | Cancel |

*Journal Date: 03/05/2007 **Journal Description:** OTM for January 2007 should not be charged to same speedtype as base salary. Move $527.85 to 51039636.

Select All **Deselect All** **Transfer**

PET Approval (Sponsored Prog)   PET Reports

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▽ **Earnings**

Transfer?	Earning	Amount	SpeedType	Fund	Org	Program	Project	SubCls	Account	Position	Job	Begin Dt	End Dt	Journal ID	Reference ID	St
☐	ADM	234.60	51045303	10	51007	10007			405100	00508210	H6G3XN	01/01/2007	01/31/2007	PAY0000487		GL
☑	OTM	527.85	51045303	10	51007	10007			405130	00508210	H6G3XN	01/01/2007	01/31/2007	PAY0000487		GL
☐	RGS	4,848.40	51045303	10	51007	10007			405100	00508210	H6G3XN	01/01/2007	01/31/2007	PAY0000487		GL

▽ **University Paid Benefits**

Plan	Amount	SpeedType	Fund	Org	Program	Project	SubCls	Account	Position	Job	Begin Dt	End Dt	Journal ID	Reference ID	Status
Medical	418.67	51045303	10	51007	10007			425020	00508210	H6G3XN	01/01/2007	01/31/2007	PAY0000487		GL
Dental	23.62	51045303	10	51007	10007			425022	00508210	H6G3XN	01/01/2007	01/31/2007	PAY0000487		GL
Life	5.22	51045303	10	51007	10007			425021	00508210	H6G3XN	01/01/2007	01/31/2007	PAY0000487		GL
STD	5.74	51045303	10	51007	10007			425023	00508210	H6G3XN	01/01/2007	01/31/2007	PAY0000487		GL
PERA	529.58	51045303	10	51007	10007			425031	00508210	H6G3XN	01/01/2007	01/31/2007	PAY0000487		GL
PERA AED	52.18	51045303	10	51007	10007			425035	00508210	H6G3XN	01/01/2007	01/31/2007	PAY0000487		GL

▽ **University Paid Taxes**

Tax	Amount	SpeedType	Fund	Org	Program	Project	SubCls	Account	Position	Job	Begin Dt	End Dt	Journal ID	Reference ID	Status
Med/ER	75.89	51045303	10	51007	10007			425030	00508210	H6G3XN	01/01/2007	01/31/2007	PAY0000487		GL

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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

Correction PET

| EmplID: 129852 Berta,Megan | Pay End Date: 01/31/2007 | Check Dt: 01/31/2007 | Hrs: 184.00 | Validate | Save |

*Journal Date: 03/05/2007 **Journal Description:** OTM for January 2007 should not be charged to same speedtype as base salary. Move $527.85 to 51039636.

Back

☐ 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 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."

Earnings Selected For Transfer

Earning	Amount	SpType	Fund	Org	Program	Project	SubCls	Account	Position	Job	Begin Dt	End Dt
OTM	527.85	51045303	10	51007	10007			405130	00508210	H6G3XN	01/01/2007	01/31/2007

Transfer Data

Earning	Amount	SpType	Fund	Org	Program	Project	SubCls	Account	Position	Job	Begin Dt	End Dt		
OTM	-527.85	51045303	10	51007	10007			405130	00508210	H6G3XN	01/01/2007	01/31/2007	+	−
OTM	527.85								00508210	H6G3XN	01/01/2007	01/31/2007	+	−

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-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

Save | Return to Search | Next in List | Previous in List | Refresh

| EmplID: 129852 | Berta,Megan | Pay End Date: 01/31/2007 | Check Dt: 01/31/2007 | Hrs: 184.00 | Validate | Cancel |

*Journal Date: 03/05/2007
Transfer Status: Valid

Journal Description: OTM for January 2007 should not be charged to same speedtype as base salary. Move $527.85 to 51039636.

Select All | Deselect All | Transfer
PET Approval (Sponsored Prog) | PET Reports

☐ 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 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."

▽ **Earnings**

Transfer?	Earning	Amount	SpeedType	Fund	Org	Program	Project	SubCls	Account	Position	Job	Begin Dt	End Dt	Journal ID	Reference ID	Status
☐	ADM	234.60	51045303	10	51007	10007			405100	00508210	H6G3XN	01/01/2007	01/31/2007	PAY0000487		GL
☐	OTM	527.85	51039636	10	51012	10007			405100	00508210	H6G3XN	01/01/2007	01/31/2007	PETC075542		Valid
☐	OTM	-527.85	51045303	10	51007	10007			405130	00508210	H6G3XN	01/01/2007	01/31/2007	PETC075542	PETC075542	Valid
☐	OTM	527.85	51045303	10	51007	10007			405130	00508210	H6G3XN	01/01/2007	01/31/2007	PAY0000487	PETC075542	Propo
☐	RGS	4,848.40	51045303	10	51007	10007			405100	00508210	H6G3XN	01/01/2007	01/31/2007	PAY0000487		GL

▽ **University Paid Benefits**

Plan	Amount	SpeedType	Fund	Org	Program	Project	SubCls	Account	Position	Job	Begin Dt	End Dt	Journal ID	Reference ID	Status
Medical	39.39	51039636	10	51012	10007			425020	00508210	H6G3XN	01/01/2007	01/31/2007	PETC075542		Valid
Medical	379.28	51045303	10	51007	10007			425020	00508210	H6G3XN	01/01/2007	01/31/2007	PETC075542		Valid
Medical	-418.67	51045303	10	51007	10007			425020	00508210	H6G3XN	01/01/2007	01/31/2007	PETC075542	PETC075542	Valid
Medical	418.67	51045303	10	51007	10007			425020	00508210	H6G3XN	01/01/2007	01/31/2007	PAY0000487	PETC075542	Proposed
Dental	2.22	51039636	10	51012	10007			425022	00508210	H6G3XN	01/01/2007	01/31/2007	PETC075542		Valid
Dental	21.40	51045303	10	51007	10007			425022	00508210	H6G3XN	01/01/2007	01/31/2007	PETC075542		Valid

Journal ID	Reference ID
PAY0000487	
PETC075542	
PETC075542	PETC075542
PAY0000487	PETC075542
PAY0000487	

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.

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

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. 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

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.