CU 8.9 HRMS Step by Step Guide Approve Payroll Expense Transfer - Organizational Development Module

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:

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

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.



- 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

PET Approval

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

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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

University-Paid Benefits Summary
 University-Paid Tax Summary

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

University-Paid Benefits Summary

D University-Paid Tax Summary

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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 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."



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

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7. Approve or Reject the PET	Transfer Summary Transfer Detail Expense Transfer ID: PETC075542 Journal Date: 03/05/2007 Transfer Status: Valid Approve/Save Reject Correction PET
 If data needs to be modified, contact the person who created the PET 	PET Reports Journal Description: DTM for January 2007 should not be charged to same speedtype as base salary. Move \$527.85 Certified by: Sum of Journal Debits: 632.36 Sum of Journal Credits: - 632.36 Total Journal Lines: 16 Status Amount SpafType Fund Deptilip Estimation Account SpeedType Description Account Description V 527.85 51039636 10 51012 10007 1600 405130 PBS Payroll Support Class FTP Overtime Pay
To approve, click Approve/Save	V -527.85 51045303 10 51007 10007 1600 405130 Payroll Production Class FTP Overtime Pay ▷ University-Paid Benefits Summary
To reject, click Reject	D University-Paid Tax Summary
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	 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 are 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." Save AReturn to Search + Previous In List + Next in List Notify
(Note – this page does not print well unless the report format is used)	
ADDITIONAL PET TIP	'S
How To Change PET or Correct Errors	 Approved PETs can not be modified. Create a new PET with the correct transfer information. Uptil 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.
	 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 <u>create a new payroll expense transfer</u> .
	 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.