

Payroll Expense Transfers

HCM HRGL Webinar

Employee Services
April 29, 2020
3 - 4 pm

Payroll Expense Transfers: Today's Topics

Before You Begin a PET

Search for Paychecks

Confirm Paycheck Earnings

Redistribute Earnings Manually

Use the Funding Template

Review Additional Tabs

Complete the PET

Before You Begin

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

Step-by-Step Guide

www.cu.edu/docs

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

HCM: PET Data Page Map
<https://www.cu.edu/doc/pet-data-mappdf>

HOME

Document Library

PET Department

ALL A B C D E F G H I J K L M N O P Q R S T U V
W X Y Z

DOCUMENT NAME	TYPE	DEPARTMENT
Funding Entry		HCM Community
Managing Funding Suspense		HCM Community
Payroll Expense Transfers - PETs (Regular Users)		HCM Community



University of Colorado

Boulder | Colorado Springs | Denver | Anschutz Medical Campus

EMPLOYEE SERVICES

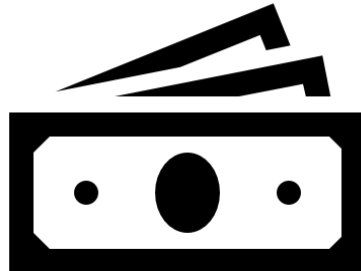
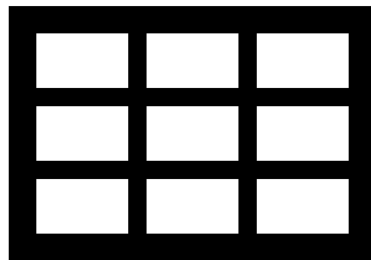
Position Funding & Payroll

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.

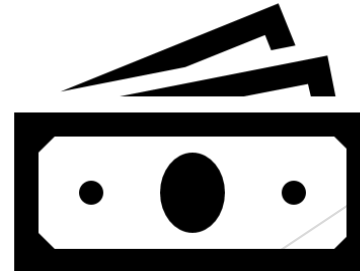
**Department
Budget Table
(DBT)**



**CU Funding
Entry Rows**



**Payroll
Expense
Transfer
(PET)**



Why Update Funding After Payroll?

Effort or Additional Pay funding changes

Transfer to/from temporary funding

Late or incorrect funding changes

Clear Suspend:

- Expired Funding End Date
- Inactive SpeedType or Project in Reporting or Closed Status
- DBT Missing for Fiscal Year or Department
- DBT Mismatched for Department

Controller/Student Employment Access

- Used for restricted earn codes
- Changes to taxes/deductions or account codes
- Work study funds



Prepare Updated Funding

EID, or Position, or SpeedType

Pay Period or Earnings Period Begin & End Dates

Optional Department, Earnings Code, or Job Code

SpeedTypes and Percentage of Distribution = 100%

Optional Documents & Justification for Grants

Additional Ad Hoc Approvers



Search for Paychecks

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

Navigate to the HCM PET Page

The image displays two screenshots of a web application interface. The top screenshot shows the 'CU Resources Home' page with a navigation menu on the right. The 'HCM' tile is highlighted with a red box. The bottom screenshot shows the 'HCM Community Users' page with a navigation menu on the right. The 'Pay Actions' tile is highlighted with a red box. The navigation menu on the right is also highlighted with a red box and contains the following items:

- CU PETs and Funding
- CU Process Direct PET
- CU Position Funding History
- CU PET Financial Aid Users
- CU Process PET Regular Users
- CU Funding Entry
- CU PET Summary
- Batch PET Upload
- New PET Request**
- My HRGL Requests
- HRGL Requests for My Depts
- HRGL Request General Search
- PET Pending Approvals

Create a New PET

Payroll Expense Transfer

Payroll Expense Transfer

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

Find an Existing Value Add a New Value

Search Criteria

Search by: HRGL Request # begins with

Search Advanced Search



QRG: PET Map - Paycheck Search

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

Payroll Expense Transfer

Paycheck Search Criteria

Paycheck Search Results

AD HOC Approvers

Attachments

Comments

Event Tracking

Header

Paycheck
Search
& Results

AD HOC
Approvers

Attachments
Comments

Events
Actions



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Paycheck Search Criteria & Results

Paycheck Search
Earnings
Taxes
Deductions
Summary

Payroll Expense Transfer
Fin Aid / Controllers: Benefits Override: Fin Aid / Controllers Office

HRGL Request #:	Status: Searched/Draft	Originator: McCoy, Catherine Louise
Submitted:	Submitted by:	Created: 04/26/20 10:18PM 🗑️
Completed:	Last Update:	

Paycheck Search Criteria
Find | View All First 1 of 1 Last

Empl ID* <input type="text"/>	Position Number* <input type="text"/>	SpeedType* <input type="text"/>
Pay Begin Date <input type="text"/>	Pay End Date <input type="text"/>	Earn Code <input type="text"/>
Earnings Begin Date <input type="text"/>	Earnings End Date <input type="text"/>	Employee Name Search <input type="text"/>
Include Off-Cycle?: <input checked="" type="checkbox"/>		Empl Record # <input type="text"/>
Search for Paychecks		Department <input type="text"/>
		Job Code <input type="text"/>

Send Notification Emails to Originator

Paycheck Search Results
Personalize | Find | View All First 1 of 1 Last

Main
Addl Info
☰

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
<input checked="" type="checkbox"/>			<input type="checkbox"/>		0					0.00	0.00	0.00

Ad Hoc Department Approvers (If Needed)

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4/28/2020

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Paycheck Search Criteria

Paycheck Search Criteria Find | View All First

1 Empl ID* OR Position Number* OR SpeedType*

2 Pay Begin Date Pay End Date Earn Code Employee Name Search Empl Record # Department

Earnings Begin Date Earnings End Date Include Off-Cycle?: Empl ID* or Paychecks Job Code

1 OR Empl ID*

OR Position Number*

OR SpeedType*

2 Pay Begin Date Pay End Date

OR Earnings Begin Date Earnings End Date



Paycheck Search

Search Paychecks

Paycheck Search Criteria Find | View All First 1 of 1

Pay Begin Date: 04/01/2018
 Pay End Date: 05/31/2018
 Earn Code:
 Employee Name Search:
 Empl Record #:
 Department:

Earnings Begin Date:
 Earnings End Date:
 Include Off-Cycle?:

 Job Code:

Select All Un-Select All Send Notification Emails to Originator

Paycheck Search Results Personalize | Find | View All | First 1-3 of 3 Last

Main

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
<input checked="" type="checkbox"/>	04/30/2018	03/31/2018	<input type="checkbox"/>	155950	0	30063	00652347	1310	F12	3,871.22	833.06	536.53
<input checked="" type="checkbox"/>	04/30/2018	04/30/2018	<input type="checkbox"/>	155950	0	30063	00652347	1310	F12	3,871.22	833.06	536.53
<input checked="" type="checkbox"/>	05/31/2018	05/31/2018	<input type="checkbox"/>	155950	0	30063	00652347	1310	F12	3,871.22	833.06	536.53

Paycheck Search

May Paycheck - Single Line

Paycheck Search Criteria Find | View All First 1 of 1

Empl ID* Position Number* SpeedType*

Pay Begin Date **Pay End Date** Earn Code Employee Name Search Empl Record # Department

Earnings Begin Date Earnings End Date Include Off-Cycle?: Job Code

Select All Un-Select All Send Notification Emails to Originator

Paycheck Search Results Personalize | Find | View All | First 1-3 of 3 Last

Main

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
<input type="checkbox"/>	04/30/2018	03/31/2018	<input type="checkbox"/>	155950	0	30063	00652347	1310	F12	3,871.22	833.06	536.53
<input type="checkbox"/>	04/30/2018	04/30/2018	<input type="checkbox"/>	155950	0	30063	00652347	1310	F12	3,871.22	833.06	536.53
<input checked="" type="checkbox"/>	05/31/2018	05/31/2018	<input type="checkbox"/>	155950	0	30063	00652347	1310	F12	3,871.22	833.06	536.53



Paycheck Search

April Paycheck - Multi Line

Paycheck Search Criteria Find | View All First 1 of 1

Empl ID* Position Number* SpeedType*

Pay Begin Date **Pay End Date** **Earn Code** **Employee Name Search** **Empl Record #** **Department**

Earnings Begin Date **Earnings End Date** **Include Off-Cycle?:** **Search for Paychecks** **Job Code**

Select All Un-Select All Send Notification Emails to Originator

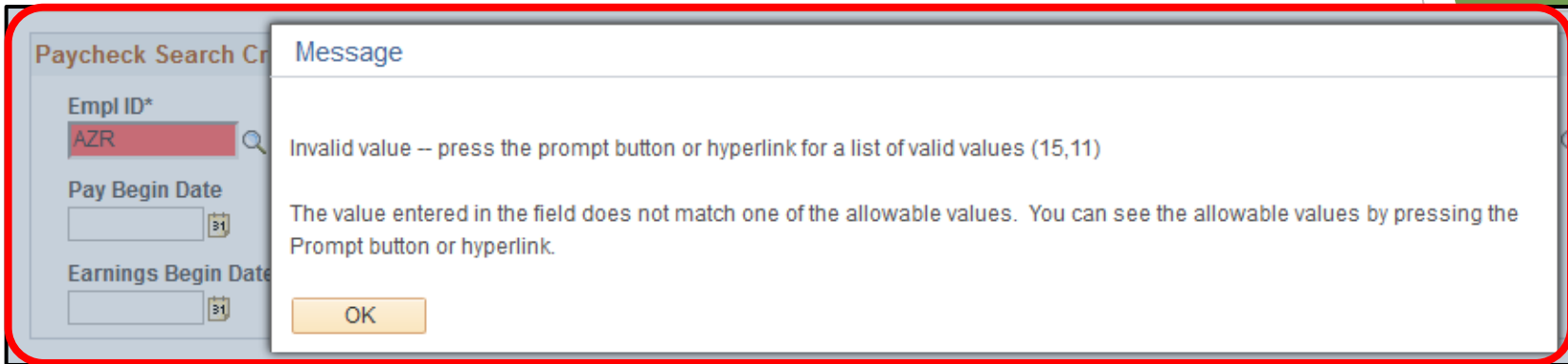
Paycheck Search Results Personalize | Find | View All | First 1-3 of 3 Last

Main Add Info

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
<input checked="" type="checkbox"/>	04/30/2018	03/31/2018	<input type="checkbox"/>	155950	0	30063	00652347	1310	F12	3,871.22	833.06	536.53
<input checked="" type="checkbox"/>	04/30/2018	04/30/2018	<input type="checkbox"/>	155950	0	30063	00652347	1310	F12	3,871.22	833.06	536.53
<input type="checkbox"/>	05/31/2018	05/31/2018	<input type="checkbox"/>	155950	0	30063	00652347	1310	F12	3,871.22	833.06	536.53



Paycheck Search System Checks



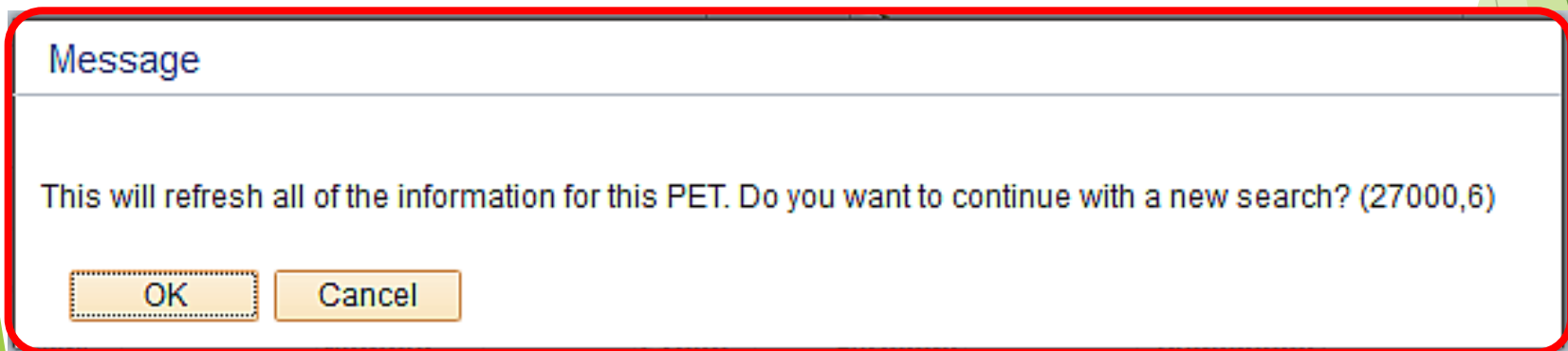
The screenshot shows a "Paycheck Search Criteria" form with fields for "Empl ID*", "Pay Begin Date", and "Earnings Begin Date". The "Empl ID*" field contains the value "AZR". A "Message" dialog box is overlaid on the form, displaying the following text:

Message

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.

OK



The screenshot shows a "Message" dialog box with the following text:

Message

This will refresh all of the information for this PET. Do you want to continue with a new search? (27000,6)

OK Cancel

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>

The screenshot shows the 'Earnings' tab of the PET Map system. It contains several sections: 'Payroll Expense Transfer' with a search bar; 'Paycheck Detail' with a 'Check Information' table; 'Job Data Snapshot' with a table of job details; 'Current Check Distribution' with a table of check amounts; 'Copy Funding Distribution' with a table of funding details; 'New Check Distribution' with a table of new checks; 'Earnings Code Summary' with a table of earnings codes; 'Comments' section; and 'Attachments' section. Red callouts A through G point to specific elements: A points to the 'Print' button; B points to the 'Check Information' table; C points to the 'Copy' button; D points to the 'Amount' column; E points to the 'Sub-Included Amount' column; F points to the 'Apply Funding Template to this Check' button; and G points to the 'Apply to include est date:' field. An 'Export' button is also visible.

Header

Paycheck Info

Job Data
Current Check

Funding
Template
New Check
Distribution
Earn Summary
Comments
Attachments

Actions



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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

Name	Empl ID	Rcd#	Paycheck Number	Pay Group	Pay End Date	Off Cycle ?	Page Nbr	Line Nbr	Sep Chk	Total Gross	Total Deductions	Total Taxes
Davis, Aaron	155950	0	6672722	F12	04/30/2018	<input type="checkbox"/>	1320	6	0	3,871.22	536.53	833.06

Job Data Snapshot Personalize | Find | View All | First 1 of 1 Last

Rcd#	Job Eff Date	Job Eff Seq	Department	Position Number	Job Code	Job Description	HR Status	Action	Action Reason	Pay Frequency	Pay Group	FTE	Std Hours	Comp Rate	Reports To	Empl Class	Reg/Temp
0	07/01/2017	2	30063	00652347	1310	Professional Research Asst	Active	PAY	PTC	M	F12	0.800000	32.00	\$3,871.220000	00350299	1	Regular

Current Check Distribution Personalize | Find | First 1-3 of 3 Last

Pay End Date	Earnings End Date	Rcd#	Department	Position #	Jobcode	Earn Code	SpeedType	SpeedType Description	Account	Project	Project End Date	Amount	Distrib %
04/30/2018	03/31/2018	0	30063	00652347	1310	SCK	62943301	PELE Auxiliary	400500			223.34	100.000
04/30/2018	03/31/2018	0	30063	00652347	1310	VAC	62943301	PELE Auxiliary	400500			223.34	100.000
04/30/2018	04/30/2018	0	30063	00652347	1310	RGS	62943301	PELE Auxiliary	400500			3,424.54	100.000

Copy Funding Distribution Apply Funding Template to Future:

Apply to Future Eff Date: Prorate Date:

Funding Template for Copy Personalize | Find | First 1 of 1 Last

SpeedType	SpeedType Description	Account	Fund Code	Project	Project End Date	Distrib %	Funding End Date
						0.000	

Set all earnings to Copy for this check Set all earnings to Copy for all checks Copy Checked Rows to Earnings Funding Template

New Check Distribution Personalize | Find | First 1-3 of 3 Last

Copy Distribution?	Earnings End Date	Rcd#	Department	Position #	Job Code	Earn Code	SpeedType	SpeedType Description	Account	Project	Project End Date	Amount	Distrib %	Funding End Date (if Apply Future = Yes)
<input type="checkbox"/>	03/31/2018	0	30063	00652347	1310	SCK	62943301	PELE Auxiliary	400500			223.34	100.000	
<input type="checkbox"/>	03/31/2018	0	30063	00652347	1310	VAC	62943301	PELE Auxiliary	400500			223.34	100.000	
<input type="checkbox"/>	04/30/2018	0	30063	00652347	1310	RGS	62943301	PELE Auxiliary	400500			3,424.54	100.000	

Scroll through the paychecks in the PET if more than one.



Paycheck Info, Job Data Snapshot, & Current Check Distribution

Paycheck Detail

Paycheck Information

Name	Empl ID	Rcd#	Paycheck Number	Pay Group	Pay End Date	Off Cycle ?	Page Nbr	Line Nbr	Sep Chk	Total Gross	Total Deductions	Total Taxes
Davis, Aaron	155950	0	6672722	F12	04/30/2018	<input type="checkbox"/>	1320	6	0	3,871.22	536.53	833.06

Job Data Snapshot

Rcd#	Job Eff Date	Job Eff Seq	Department	Position Number	Job Code	Job Description	HR Status	Action	Action Reason	Pay Frequency	Pay Group	FTE	Std Hours	Comp Rate
0	7/01/2017	2	30063	00652347	310	Professional Research Asst	Active	PAY	PTC	M	F12	0.800000	32.00	\$3,871.220000

Current Check Distribution

Pay End Date	Earnings End Date	Rcd#	Department	Position #	Jobcode	Earn Code	SpeedType	SpeedType Description	Account	Project	Project End Date	Amount	Distrib %
04/30/2018	03/31/2018	0	30063	00652347	310	SCK	62943301	PELE Auxiliary	400500			223.34	100.000
04/30/2018	03/31/2018	0	30063	00652347	310	VAC	62943301	PELE Auxiliary	400500			223.34	100.000
04/30/2018	04/30/2018	0	30063	00652347	310	RGS	62943301	PELE Auxiliary	400500			3,424.54	100.000



Paycheck Partial Earnings

Paycheck Search | Earnings | Taxes | Deductions | Summary

Paycheck Search Results

Personalize | Find | View All | First 1-3 of 3 Last

Main | Addl Info

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
<input type="checkbox"/>	04/30/2018	03/31/2018	<input type="checkbox"/>	155950	0	30063	00652347	1310	F12	3,871.22	833.06	536.53
<input checked="" type="checkbox"/>	04/30/2018	04/30/2018	<input type="checkbox"/>	155950	0	30063	00652347	1310	F12	3,871.22	833.06	536.53
<input checked="" type="checkbox"/>	05/31/2018	05/31/2018	<input type="checkbox"/>	155950	0	30063	00652347	1310	F12	3,871.22	833.06	536.53

Paycheck Search | Earnings | Taxes | Deductions | Summary

Paycheck Detail

Paycheck Information

Name	Empl ID	Rcd#	Paycheck Number	Pay Group	Pay End Date	Off Cycle ?	Page Nbr	Line Nbr	Se Ch	Total Gross	Total Deductions	Total Taxes
Davis, Aaron	155950	0	6672722	F12	04/30/2018	<input type="checkbox"/>	1320	6	0	3,871.22	536.53	833.06

Job Data Snapshot

Rcd#	Job Eff Date	Job Eff Seq	Department	Position Number	Job Code	Job Description	HR Status	Action	Action Reason	Pay Frequency	Pay Group	FTE	Std Hours	Comp Rate	Reports To
0	07/01/2017	2	30063	00652347	1310	Professional Research Asst	Active	PAY	PTC	M	F12	0.800000	32.00	\$3,871.220000	0350299

Current Check Distribution

Pay End Date	Earnings End Date	Rcd#	Department	Position #	Jobcode	Earn Code	SpeedType	SpeedType Description	Account	Project	Project End Date	Amount	Distrib %
04/30/2018	04/30/2018	0	30063	00652347	1310	RGS	62943301	PELE Auxiliary	400500			3,424.54	100.000

Paycheck Search - Watch It

The screenshot displays the University of Colorado Employee Services portal. At the top, the user is identified as 'User: MCCO00605 - in: IEPTRN'. The page title is 'CU Resources Home'. A search bar is located at the top left. The main content area is a grid of application tiles:

- HCM**: Human Capital Management, featuring a person icon.
- CU-Data**: Data management tools, featuring a document icon.
- Concur Travel & Expense Syst...**: Expense management, featuring a 'C' icon.
- Finance**: Financial services, featuring the 'PEOPLESOFT FINANCE' logo.
- Skillssoft**: Learning management, featuring the 'Skillssoft' logo.
- CU Careers - Search Jobs/Apply**: Job search, featuring the CU logo and 'CAREERS' text.
- Paychecks**: Payroll services, featuring a money icon.
- My Leave**: Leave management, featuring a clock icon.
- Code of Conduct**: Ethics and compliance, featuring a scales of justice icon.
- My Preferences**: User settings, featuring a gear icon.
- Approvals**: Request management, featuring a document and checkmark icon.
- Request System Access**: System access, featuring a padlock icon with 'HCM FIN Marketplace more' text.

Redistribute Earnings

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

QRG: PET Map - Earnings Tab

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

The screenshot shows the 'Earnings' tab of the PET Map system. It contains several sections: 'Payroll Expense Transfer' at the top, 'Paycheck Detail' with a 'Paycheck Information' table, 'Job Data Snapshot' table, 'Current Check Distribution' table, 'Open Funding Distribution' section with an 'Apply Funding Template to Future' button, 'Funding Template for Copy' section, 'New Check Distribution' table (highlighted with a red box), 'Earnings Code Summary' table, 'Comments' section, and 'Attachments' section. Red callouts A through G point to specific UI elements: A (Find/View All), B (Table columns), C (Table columns), D (Table columns), E (Table column), F (Apply button), and G (Variable code dropdown). An 'Export' button is also visible.

Header
Paycheck Info
Job Data
Current Check
Funding Template
New Check Distribution
Earn Summary
Comments
Attachments
Actions

New Check Distribution

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

Name	Empl ID	Rcd#	Paycheck Number	Pay Group	Pay End Date	Off Cycle ?	Page Nbr	Line Nbr	Sep Chk	Total Gross	Total Deductions	Total Taxes
Davis, Aaron	155950	0	6672722	F12	04/30/2018	<input type="checkbox"/>	1320	6	0	3,871.22	536.53	833.06

Job Data Snapshot Personalize | Find | View All First 1 of 1 Last

Rcd#	Job Eff Date	Job Eff Seq	Department	Position Number	Job Code	Job Description	HR Status	Action	Action Reason	Pay Frequency	Pay Group	FTE	Std Hours	Comp Rate	Reports To	Empl Class	Reg/Temp
0	07/01/2017	2	30063	00652347	1310	Professional Research Asst	Active	PAY	PTC	M	F12	0.800000	32.00	\$3,871.220000	00350299	1	Regular

Current Check Distribution Personalize | Find First 1-3 of 3 Last

Pay End Date	Earnings End Date	Rcd#	Department	Position #	Jobcode	Earn Code	SpeedType	SpeedType Description	Account	Project	Project End Date	Amount	Distrib %
04/30/2018	03/31/2018	0	30063	00652347	1310	SCK	62943301	PELE Auxiliary	400500			223.34	100.000
04/30/2018	03/31/2018	0	30063	00652347	1310	VAC	62943301	PELE Auxiliary	400500			223.34	100.000
04/30/2018	04/30/2018	0	30063	00652347	1310	RGS	62943301	PELE Auxiliary	400500			3,424.54	100.000

Copy Funding Distribution Apply Funding Template to Future:
 Apply to Future Eff Date: Prorate Date:

Funding Template for Copy Personalize | Find First 1 of 1 Last

SpeedType	SpeedType Description	Account	Fund Code	Project	Project End Date	Distrib %	Funding End Date
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	0.000	<input type="text"/>

Set all earnings to Copy for this check Set all earnings to Copy for all checks Copy Checked Rows to Earnings Funding Template

New Check Distribution Personalize | Find First 1-3 of 3 Last




Copy Distribution?	Earnings End Date	Rcd#	Department	Position #	Job Code	Earn Code	SpeedType	SpeedType Description	Account	Project	Project End Date	Amount	Distrib %	Funding End Date (if Apply Future = Yes)
<input type="checkbox"/>	03/31/2018	0	30063	00652347	1310	SCK	62943301	PELE Auxiliary	400500			223.34	100.000	<input type="text"/>
<input type="checkbox"/>	03/31/2018	0	30063	00652347	1310	VAC	62943301	PELE Auxiliary	400500			223.34	100.000	<input type="text"/>
<input type="checkbox"/>	04/30/2018	0	30063	00652347	1310	RGS	62943301	PELE Auxiliary	400500			3,424.54	100.000	<input type="text"/>





Scroll through the paychecks in the PET if more than one.













Overwrite Funding Details

Add and Delete Rows

New Check Distribution

Copy Distribution?	Earnings End Date	Rcd#	Department	Position #	Job Code	Earn Code	SpeedType	SpeedType Description
<input type="checkbox"/>	03/31/2018	0	30063	00652347	1310	SCK	62943301 	PELE Auxiliary
<input type="checkbox"/>	03/31/2018	0	30063	00652347	1310	VAC	62943301 	PELE Auxiliary
<input type="checkbox"/>	04/30/2018	0	30063	00652347	1310	RGS	62943301 	PELE Auxiliary

Personalize | Find |  |  First  1-3 of 3  Last

Account	Project	Project End Date	Amount	Distrib %	Funding End Date If Apply Future = (yes)	
400500 			223.34	100.000		 
400500 			223.34	100.000		 
400500 			3,424.54	100.000		 

Percent Distribution = 100%

Amount vs Distrib %

Current Check Distribution									1 of 1 Last	
Pay End Date	Earnings End Date	Rcd#	Department	Position #	Jobcode	Earn Code	SpeedType	SpeedType Descr	Amount	Distrib %
05/31/2018	05/31/2018	0	30063	00652347	1310	RGS	62943301	PELE Auxiliary	3,871.22	100.000

New Check Distribution									End Date	
Copy Distribution?	Earnings End Date	Rcd#	Department	Position #	Job Code	Earn Code	SpeedType	Spe	Amount	Distrib %
<input checked="" type="checkbox"/>	05/31/2018	0	30063	00652347	1310	RGS	61000240	ISIS	1,935.61	50.000
<input checked="" type="checkbox"/>	05/31/2018	0	30063	00652347	1310	RGS	61000013	ISIS	1,935.61	50.000

Earn Code	SpeedType	SpeedType Descr
RGS	61000240	ISIS Suspende
RGS	61000013	ISIS Suspende

Amount	Distrib %
1,935.61	50.000
1,935.61	50.000

SAVE & System Checks

Save Save / Submit Approve Deny Recall

Earn Code	SpeedType
SCK	610008

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.

OK

Warning -- No changes have been requested. (27000,17)

OK Cancel

New earnings distribution adds up to 55.84, but the total distribution needs to be 223.34. (27000,21)

OK



Manual Update - Watch It

Paycheck Search
Payroll Expense Transfer
MCC0000605 Database: HCMTRN

[New Window](#) | [Help](#) | [Personalize Page](#)

Payroll Expense Transfer
Fin Aid / Controllers: Benefits Override: Fin Aid / Controllers Office

HRGL Request #:	Status: Searched/Draft	Originator: McCoy, Catherine Louise
Submitted:	Submitted by:	Created: 04/30/20 12:34AM
Completed:		Last Update:

Paycheck Search Criteria Find | View All | First | 1 of 1 | Last

Empl ID* 155950 <input type="text"/> Davis, Aaron	Position Number* <input type="text"/>	SpeedType* <input type="text"/>
Pay Begin Date 04/01/2018 <input type="text"/>	Pay End Date 05/31/2018 <input type="text"/>	Earn Code <input type="text"/>
Earnings Begin Date <input type="text"/>	Earnings End Date <input type="text"/>	Employee Name Search <input type="text"/>
<input type="checkbox"/> Include Off-Cycle?: <input checked="" type="checkbox"/>		Department <input type="text"/>
<input type="button" value="Search for Paychecks"/>		Job Code <input type="text"/>

 Send Notification Emails to Originator

Paycheck Search Results Personalize | Find | View All | First | 1-3 of 3 | Last

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
<input checked="" type="checkbox"/>	04/30/2018	03/31/2018	<input type="checkbox"/>	155950	0	30063	00652347	1310	F12	3,871.22	833.06	536.53
<input checked="" type="checkbox"/>	04/30/2018	04/30/2018	<input type="checkbox"/>	155950	0	30063	00652347	1310	F12	3,871.22	833.06	536.53
<input checked="" type="checkbox"/>	05/31/2018	05/31/2018	<input type="checkbox"/>	155950	0	30063	00652347	1310	F12	3,871.22	833.06	536.53

Ad Hoc Department Approvals (If Needed)

Department Approver 1

Empl ID:

Department Approver 2

Empl ID:

Department Approver 3

Empl ID:

Attachments Personalize | Find | First | 1 of 1 | Last

Attached File	Description	Add Attachment	Attached By	Last Update Date/Time
1		<input type="button" value="Add Attachment"/>		



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>

The screenshot shows the 'Earnings' tab of the PET Map system. It features several sections: 'Payroll Expense Transfer' at the top, 'Paycheck Detail' with a 'Paycheck Information' table, 'Job Data Snapshot' with a table of job details, 'Current Check Distribution' with a table of check amounts, 'Copy Funding Distribution' with a table for copying funding, 'New Check Distribution' with a table for new checks, and 'Earnings Copy Summary' with a table of earnings. Red callouts A through G point to specific elements: A (Find button), B (Table columns), C (Copy button), D (Table columns), E (Table columns), F (Copy button), and G (Apply button). An 'Export' button is also visible.

Header

Paycheck Info

Job Data
Current Check

Funding
Template
New Check
Distribution

Earn Summary
Comments
Attachments

Actions



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EMPLOYEE SERVICES

Funding Template for Copy

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

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 1 Last

Paycheck Information

Name	Empl ID	Rcd#	Paycheck Number	Pay Group	Pay End Date	Off Cycle ?	Page Nbr	Line Nbr	Sep Chk	Total Gross	Total Deductions	Total Taxes
		0				<input type="checkbox"/>			0	0.00	0.00	0.00

Job Data Snapshot

Personalize | Find | View All | First 1 of 1 Last

Rcd#	Job Eff Date	Job Eff Seq	Department	Position Number	Job Code	Job Description	HR Status	Action	Action Reason	Pay Frequency	Pay Group	FTE	Std Hours	Comp Rate	Reports To	Empl Class	Reg/Temp
0		0															

Current Check Distribution

Personalize | Find | First 1 of 1 Last

Pay End Date	Earnings End Date	Rcd#	Department	Position #	Jobcode	Earn Code	SpeedType	SpeedType Description	Account	Project	Project End Date	Amount	Distrib %
		0										0.00	0.000

Apply Funding Template to Future:

Copy Funding Distribution

Apply to Future Eff Date: Prorate Date:

Funding Template for Copy

Personalize | Find | First 1 of 1 Last

SpeedType	SpeedType Description	Account	Fund Code	Project	Project End Date	Distrib %	Funding End Date
<input type="text"/>	<input type="text"/>	<input type="text"/>				0.000	<input type="text"/>

Set all earnings to Copy for this check Set all earnings to Copy for all checks Copy Checked Rows to Earnings Funding Template

New Check Distribution

Personalize | Find | First 1 of 1 Last

Copy Distribution?	Earnings End Date	Rcd#	Department	Position #	Job Code	Earn Code	SpeedType	SpeedType Description	Account	Project	Project End Date	Amount	Distrib %	Funding End Date (if Apply Future = Yes)
<input type="checkbox"/>		0										0.00	0.000	

Earnings Code Summary

Personalize | Find | First 1 of 1 Last

Earnings End Date	Department	Position #	Job Code	Rcd#	Earn Code	Distributed Amount	Distributed Percent	Total for Earn Code
				0		0.00	0.000	0.00

Why Use the Template?

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

Avoid manual entry errors or confusion when entering data line by line

Use the template “workspace” to confirm new funding distributions are correct before applying to the paycheck

Apply the distribution to multiple 100% distributions with a single click (RGS, VAC, SKS, etc.)

Apply the distribution to multiple paychecks in the PET with a single click



Example of New Distribution

Current Check Distribution

Pay End Date	Earnings End Date	Rcd#	Department	Position #	Jobcode	Earn Code	SpeedType	SpeedType Desc
04/30/2018	03/31/2018	0	30063	00652347	1310	SCK	62943301	PELE Auxili
04/30/2018	03/31/2018	0	30063	00652347	1310	VAC	62943301	PELE Auxili
04/30/2018	04/30/2018	0	30063	00652347	1310	RGS	62943301	PELE Auxili

New Check Distribution

Copy Distribution?	Earnings End Date	Rcd#	Department	Position #	Job Code	Earn Code	SpeedType	SpeedType Desc
<input checked="" type="checkbox"/>	03/31/2018	0	30063	00652347	1310	SCK	61000008	Tobacco-AVCFM Ir
<input checked="" type="checkbox"/>	03/31/2018	0	30063	00652347	1310	SCK	61000074	CSPH-Dean's Offi
<input checked="" type="checkbox"/>	03/31/2018	0	30063	00652347	1310	VAC	61000008	Tobacco-AVCFM Ir
<input checked="" type="checkbox"/>	03/31/2018	0	30063	00652347	1310	VAC	61000074	CSPH-Dean's Offi
<input checked="" type="checkbox"/>	04/30/2018	0	30063	00652347	1310	RGS	61000008	Tobacco-AVCFM Ir
<input checked="" type="checkbox"/>	04/30/2018	0	30063	00652347	1310	RGS	61000074	CSPH-Dean's Offi



Funding Template for Copy

4 Copy Funding Distribution

Apply Funding Template to Future:

Apply to Future Eff Date: Prorate Date:

Funding Template for Copy Personalize | Find | First 1 of 1 Last

SpeedType	SpeedType Description	Account	Fund Code	Department	Program Code	Project	Project End Date	Distrib %	Funding End Date
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>					0.000	<input type="text"/>

2

3 Set all earnings to Copy for this check

Set all earnings to Copy for all checks

1 Copy Checked Rows to Earnings Funding Template

Set all earnings to Copy for this check Set all earnings to Copy for all checks Copy Checked Rows to Earnings Funding Template

New Check Distribution Personalize | Find | First

Copy Distribution	Earn Date	Rcd#	Department	Position #	Job Code	Earn Code	SpeedType	SpeedType Description	Account	Project	Project End Date	Amount	Distrib %
<input checked="" type="checkbox"/>												0.00	0.000

4



Example of Template for Copy

Copy Funding Distribution Apply Funding Template to Future:

Apply to Future Eff Date: Prorate Date:

Funding Template for Copy Personalize | Find | | First 1 of 1 Last

SpeedType	SpeedType Description	Account	Fund Code	Project	Project End Date	Distrib %	Funding End Date
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	0.000	<input type="text"/>

Set all earnings to Copy for this check Set all earnings to Copy for all checks Copy Checked Rows to Earnings Funding Template

New Check Distribution Personalize | Find | | First 1-3 of 3 Last

Copy Distribution?	Earnings End Date	Rcd#	Department	Position #	Job Code	Earn Code	SpeedType	SpeedType Description	Account	Project	Project End Date	Amount	Distrib %	Funding End Date (if Apply Future = Yes)
<input type="checkbox"/>	03/31/2018	0	30063	00652347	1310	SCK	62943301	PELE Auxiliary	400500			223.34	100.000	<input type="text"/>
<input type="checkbox"/>	03/31/2018	0	30063	00652347	1310	VAC	62943301	PELE Auxiliary	400500			223.34	100.000	<input type="text"/>
<input checked="" type="checkbox"/>	04/30/2018	0	30063	00652347	1310	RGS	62943301	PELE Auxiliary	400500			4,245.54	100.000	<input type="text"/>

1

Copy Funding Distribution Apply Funding Template to Future:

Apply to Future Eff Date: Prorate Date:

Funding Template for Copy Personalize | Find | | First 1 of 1 Last

SpeedType	SpeedType Description	Account	Fund Code	Project	Project End Date	Distrib %	Funding End Date
62943301	PELE Auxiliary	444444	29			100.000	<input type="text"/>

Set all earnings to Copy for this check Set all earnings to Copy for all checks Copy Checked Rows to Earnings Funding Template

New Check Distribution Personalize | Find | | First 1-3 of 3 Last

Copy Distribution?	Earnings End Date	Rcd#	Department	Position #	Job Code	Earn Code	SpeedType	SpeedType Description	Account	Project	Project End Date	Amount	Distrib %	Funding End Date (if Apply Future = Yes)
<input type="checkbox"/>	03/31/2018	0	30063	00652347	1310	SCK	62943301	PELE Auxiliary	400500			223.34	100.000	<input type="text"/>
<input type="checkbox"/>	03/31/2018	0	30063	00652347	1310	VAC	62943301	PELE Auxiliary	400500			223.34	100.000	<input type="text"/>
<input checked="" type="checkbox"/>	04/30/2018	0	30063	00652347	1310	RGS	62943301	PELE Auxiliary	400500			3,424.54	100.000	<input type="text"/>

1

Example of Template for Copy

Copy Funding Distribution Apply Funding Template to Future:

Apply to Future Eff Date: Prorate Date:

Funding Template for Copy Personalize | Find | | First 1-2 of 2 Last

SpeedType	SpeedType Description	Account	Fund Code	Project	Project End Date	Distrib %	Funding End Date
61000008	Tobacco-AVCFM Infrstruc-CES	444444	10			25.000	<input type="text"/>
61000074	CSPH-Dean's Office	444444	10			75	<input type="text"/>

Set all earnings to Copy for this check Set all earnings to Copy for all checks Copy Checked Rows to Earnings Funding Template

New Check Distribution Personalize | Find | | First 1-3 of 3 Last

Copy Distribution?	Earnings End Date	Rcd#	Department	Position #	Job Code	Earn Code	SpeedType	SpeedType Description	Account	Project	Project End Date	Amount	Distrib %	Funding End Date (if Apply Future = Yes)
<input type="checkbox"/>	03/31/2018	0	30063	00652347	1310	SCK	62943301	PELE Auxiliary	400500			223.34	100.000	<input type="text"/>
<input type="checkbox"/>	03/31/2018	0	30063	00652347	1310	VAC	62943301	PELE Auxiliary	400500			223.34	100.000	<input type="text"/>
<input checked="" type="checkbox"/>	04/30/2018	0	30063	00652347	1310	RGS	62943301	PELE Auxiliary	400500			3,424.54	100.000	<input type="text"/>

2

Copy Funding Distribution Apply Funding Template to Future:

Apply to Future Eff Date: Prorate Date:

Funding Template for Copy Personalize | Find | | First 1-2 of 2 Last

SpeedType	SpeedType Description	Account	Fund Code	Project	Project End Date	Distrib %	Funding End Date
61000008	Tobacco-AVCFM Infrstruc-CES	444444	10			25.000	<input type="text"/>
61000074	CSPH-Dean's Office	444444	10			75.000	<input type="text"/>

Set all earnings to Copy for this check Set all earnings to Copy for all checks Copy Checked Rows to Earnings Funding Template

New Check Distribution Personalize | Find | | First 1-3 of 3 Last

Copy Distribution?	Earnings End Date	Rcd#	Department	Position #	Job Code	Earn Code	SpeedType	SpeedType Description	Account	Project	Project End Date	Amount	Distrib %	Funding End Date (if Apply Future = Yes)
<input checked="" type="checkbox"/>	03/31/2018	0	30063	00652347	1310	SCK	62943301	PELE Auxiliary	400500			223.34	100.000	<input type="text"/>
<input checked="" type="checkbox"/>	03/31/2018	0	30063	00652347	1310	VAC	62943301	PELE Auxiliary	400500			223.34	100.000	<input type="text"/>
<input checked="" type="checkbox"/>	04/30/2018	0	30063	00652347	1310	RGS	62943301	PELE Auxiliary	400500			3,424.54	100.000	<input type="text"/>

3



Example of Template for Copy

New Check Distribution

Copy Distribution?	Earnings End Date	Rcd#	Department	Position #	Job Code	Earn Code	SpeedType	SpeedType Description
<input type="checkbox"/>	03/31/2018	0	30063	00652347	1310	SCK	62943301	PELE Auxiliary
<input type="checkbox"/>	03/31/2018	0	30063	00652347	1310	VAC	62943301	PELE Auxiliary
<input checked="" type="checkbox"/>	04/30/2018	0	30063	00652347	1310	RGS	62943301	PELE Auxiliary

1

Copy Funding Distribution

Apply Funding Template to Future:

Apply to Future Eff Date: _____ Prorate Date: _____

Funding Template for Copy

Speedtype	Speedtype Description	Account	Fund Code	Project	Project End Date	Distrib %	Funding End Date
61000008	Tobacco-AVCFM Infrstructur-CES	444444	10			25.000	
61000074	CSPH-Dean's Office	444444	10			75.000	

Set all earnings to Copy for this check Set all earnings to Copy for all checks Copy Checked Rows to Earnings Funding Template

New Check Distribution

Copy Distribution?	Earnings End Date	Rcd#	Department	Position #	Job Code	Earn Code	SpeedType	SpeedType Description	Account	Project	Project End Date	Amount	Distrib % (FY)
<input checked="" type="checkbox"/>	03/31/2018	0	30063	00652347	1310	SCK	61000008	Tobacco-AVCFM Infrstructur-CES	400500			55.83	24.998
<input checked="" type="checkbox"/>	03/31/2018	0	30063	00652347	1310	SCK	61000074	CSPH-Dean's Office	400500			167.51	75.000
<input checked="" type="checkbox"/>	03/31/2018	0	30063	00652347	1310	VAC	61000008	Tobacco-AVCFM Infrstructur-CES	400500			55.83	24.998
<input checked="" type="checkbox"/>	03/31/2018	0	30063	00652347	1310	VAC	61000074	CSPH-Dean's Office	400500			167.51	75.000
<input checked="" type="checkbox"/>	04/30/2018	0	30063	00652347	1310	RGS	61000008	Tobacco-AVCFM Infrstructur-CES	400500			856.13	25.000
<input checked="" type="checkbox"/>	04/30/2018	0	30063	00652347	1310	RGS	61000074	CSPH-Dean's Office	400500			2,568.41	75.000

4

4



Template Copy to All Checks

Set all earnings to Copy for all checks

4

Copy Funding Distribution

Apply Funding Template to Future:

Apply to Future Eff Date:

Prorate Date:

Funding Template for Copy

Personalize | Find |

First 1 of 1 Last

SpeedType SpeedType Descr

Account

Fund Code

Department

Program Code

Project

Project End Date

Distrib %

Funding End Date

2

0.000

Set all earnings to Copy for this check

3

Set all earnings to Copy for all checks

Copy Checked Rows to Earnings Funding

1

late



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EMPLOYEE SERVICES

4/28/2020

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Funding Template - Watch It

Payroll Expense Transfer MCCO00605 Database: HCMTRN

Paycheck Search | Earnings | Taxes | Deductions | Summary

Payroll Expense Transfer Fin Aid / Controllers: Benefits Override: Fin Aid / Controllers Office

HRGL Request #: MCCO00605-20200430-001 Status: Searched/Draft Originator: McCoy, Catherine Louise

Submitted: Submitted by: Created: 04/30/20 12:34AM

Completed: Last Update: 04/30/20 12:38AM

Paycheck Search Criteria Find | View All | First | 1 of 1 | Last

Empl ID* Position Number* SpeedType*

Pay Begin Date Earn Code Employee Name Search Empl Record # Department

Earnings Begin Date Earnings End Date Include Off-Cycle?: Job Code

Send Notification Emails to Originator

Select All Un-Select All

Paycheck Search Results Personalize | Find | View All | First | 1-3 of 3 | Last

Main | Add Info

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
<input checked="" type="checkbox"/>	04/30/2018	05/31/2018	<input type="checkbox"/>	155950	0	30063	00652347	1310	F12	3,871.22	833.06	536.53
<input checked="" type="checkbox"/>	04/30/2018	04/30/2018	<input type="checkbox"/>	155950	0	30063	00652347	1310	F12	3,871.22	833.06	536.53
<input checked="" type="checkbox"/>	05/31/2018	05/31/2018	<input type="checkbox"/>	155950	0	30063	00652347	1310	F12	3,871.22	833.06	536.53

Ad Hoc Department Approvers (If Needed)

Department Approver 1
Empl ID:

Department Approver 2
Empl ID:

Department Approver 3
Empl ID:

Attachments Personalize | Find | View All | First | 1 of 1 | Last

Attached File	Description	Add Attachment	Attached By	Last Update Date/Time
1		<input type="button" value="Add Attachment"/>		



Apply Funding Template to Future

Copy Funding Distribution **Apply Funding Template to Future:**

Apply to Future Eff Date: 04/01/2020 Prorate Date:

Funding Template for Copy Personalize | Find | | First 1-2 of 2 Last

SpeedType	SpeedType Description	Account	Fund Code	Project	Project End Date	Distrib %	Funding End Date
-----------	-----------------------	---------	-----------	---------	------------------	-----------	------------------

The Earnings Funding Template speedtypes and distribution percentages will be applied to the Department Budget Table with an effective date of 2020-04-01. If the specified funding sources should impact off cycle payrolls prior to 2020-04-01, please create a funding entry transaction. (0,0)

OK

Warning: if the PET is recalled or denied, this form will be uneditable and a new PET will be required. Changes to the Department Budget Table will be committed on submission, and an update to the Department Budget Table may be required if the funding distribution specified in this PET form is inaccurate for the upcoming pay periods. If the form is recalled or denied, the form's status will be "uneditable". (0,0)

OK

Message

Warning -- Project end date expires prior to estimated funding effective date on the earnings funding template for the 'Apply to Future' option.

OK

Cancel



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EMPLOYEE SERVICES

4/28/2020

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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>

Payroll Expense Transfer

status: searchcriteria originator: MCCaj, Catherine Louise

Paycheck Detail

Paycheck Information

Name	Check ID	Month	Paycheck Number	Pay Group	Pay End Date	Off Cycle Y	Make Net	Line Net	See Calc	Net Gross	Net Deductions	Net Taxes
	0					<input type="checkbox"/>			0	0.00	0.00	0.00

Job Data Snapshot

Rad#	Job Eff Date	Department	Position Number	Job Code	Job Description	HR Status	Action	Action Reason	Pay Frequency	Pay Group	FTE	Std Hours	Comp Rate	Reports To	Emp Class	Pay/Bmp
0																

Current Distribution

Pay End Date	Earnings End Date	Position Number	Job Code	State	Tax Class	SpeedType	SpeedType Description	Account	Fund Code	Department	Program Code	Project	Project End Date	Activity	Char/Field Descr	Amount	Distrib %
															Char/Field Descr	0.00	0.000

Funding Template for Copy

SpeedType	SpeedType Description	Department	Project	Account	Fund Code	Program Code	PO Descr	Unit	Activity	Funding End Date	Project End Date	Distrib %
												0.000

New Check Distribution

Org	Earnings End Date	Rad#	Department	Position #	Job Code	State	Tax Class	SpeedType	SpeedType Description	Account	Fund Code	Department	Program Code	Project	Project End Date	Char/Field Descr	Amount	Distrib %	Funding End Code
		0														Char/Field Descr	0.000		

Tax Class Summary

Earnings End Date	Department	Position #	Job Code	Rad#	State	Tax Class	Distributed Amount	Distributed Percent	Blal for Tax Class
				0			0.00	0.000	0.00

Comments

Attachments

Save Save / Submit Approve Deny Recall

Header

Paycheck Info

Job Data

Current Check

Template
New Check
Distribution

Comments
Attachments

Actions



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EMPLOYEE SERVICES

Taxes and Deductions

Paycheck Search | Earnings | **Taxes** | Deductions | Summary

Payroll Expense Transfer

HRGL Request #: MCCO000605-20200426-001 Status: Searched/Draft Originator: McCoy, Catherine Louise

Paycheck Detail Find | View All | First

Paycheck Information

Name	Empl ID	Rcd#	Paycheck Number	Pay Group	Pay End Date	Off Cycle ?	Page Nbr	Line Nbr	Sep Chk	Total Gross	Total Deductions	Total Taxes
		0	6715559	F12	05/31/2018	<input type="checkbox"/>	1335	6	0	3,871.22	536.53	833.06

Job Data Snapshot Personalize | Find | View All | First 1 of 1 Last

Rcd#	Job Eff Date	Job Eff Seq	Department	Position Number	Job Code	Job Description	HR Status	Action	Action Reason	Pay Frequency	Pay Group	FTE	Std Hours	Comp Rate	Reports To	Empl Class	Reg/Temp
0	07/01/2017	2	30063	00652347	1310	Professional Research Asst	Active	PAY	PTC	M	F12	0.800000	32.00	\$3,871.220000	00350299	1	Regular

Current Distribution Personalize | Find | First 1-2 of 2 Last

Pay End Date	Earnings End Date	Position Number	Job Code	State	Tax Class	SpeedType	SpeedType Description	Account	Fund Code	Department	Program Code	Project	Project End Date	Activity	Chartfield Descr	Amount	Distrib %
05/31/2018	05/31/2018	00652347	1310	SU	OASDVER	62943301	PELE Auxiliary	418730	29	30063	28274				Chartfield Descr	240.09	100.000
05/31/2018	05/31/2018	00652347	1310	SU	Med/ER	62943301	PELE Auxiliary	418734	29	30063	28274				Chartfield Descr	56.15	100.000

Funding Template for Copy Personalize | Find | First 1 of 1 Last

SpeedType	SpeedType Description	Department	Project	Account	Fund Code	Program Code	PC Bus Unit	Activity	Funding End Date	Project End Date	Distrib %
											0.000

Copy Funding Distribution

New Check Distribution Personalize | Find | First 1 of 1 Last

Copy Distribution?	Earnings End Date	Rcd#	Department	Position #	Job Code	State	Tax Class	SpeedType	SpeedType Description	Account	Fund Code	Department	Program Code	Project	Project End Date	Chartfield Descr	Amount	Distrib %
<input type="checkbox"/>	05/31/2018	0	30063	00652347	1310	SU	OASDVER	61000009	Gen Infrstr Recharge-IR-DC	418730	10	30276	49035			Chartfield Descr	60.02	25.000
<input type="checkbox"/>	05/31/2018	0	30063	00652347	1310	SU	OASDVER	61000074	CSPH-Dean's Office	418730	10	21411	49846			Chartfield Descr	180.07	75.000
<input type="checkbox"/>	05/31/2018	0	30063	00652347	1310	SU	Med/ER	61000009	Gen Infrstr Recharge-GIR-DC	418734	10	30276	49035			Chartfield Descr	14.04	25.000
<input type="checkbox"/>	05/31/2018	0	30063	00652347	1310	SU	Med/ER	61000074	CSPH-Dean's Office	418734	10	21411	49846			Chartfield Descr	42.11	75.000

Tax Class Summary Personalize | Find | First 1-2 of 2 Last

Earnings End Date	Department	Position #	Job Code	Rcd#	State	Tax Class	Distributed Amount	Distributed Percent	Total for Tax Class
05/31/2018	30063	00652347	1310	0	SU	OASDVER	240.09	100.000	240.09
05/31/2018	30063	00652347	1310	0	SU	Med/ER	56.15	100.000	56.15

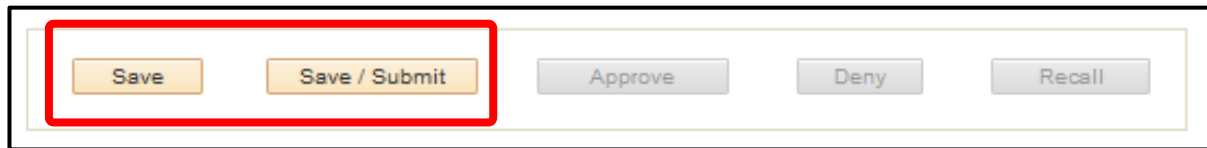


Taxes and Deductions

UCD/AMC	
• Follow earnings	
UCB	
• Pooled	
UCCS	
• Pooled	
USYS	
• Based on Earnings SpeedType	



SAVE & System Checks



Save Save / Submit Approve Deny Recall

SpeedType 62943301 is inactive, for expenses that net to -3424.54 for GL account 400500.

OK

Contact Campus Controller Office or SPA/OGC to change to Active

Warning -- Because this payroll expense transfer (PET) affects a grant, please complete all the questions on the Grants Certification page/tab included in this component.

OK

Cancel



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 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>

Paycheck Search | Earnings | Taxes | Deductions | **Summary**

Payroll Expense Transfer

HRGL Request #: Status: Searched/Draft Originator: McCoy, Catherine Louise

PET Combination Summary Personalize | Find | First 1 of 1 Last

Speedtype	Earnings	Deductions	Taxes	Total
	0.00	0.00	0.00	0.00

PET Combination Detail Summary Personalize | Find | First 1 of 1 Last

Type	Amount	Speedtype	Account	Description
	0.00			

PET Detail Personalize | Find | First 1 of 1 Last

Type	Ernod/Dedod/Tax	Amount	Speedtype	Account	Check Nbr	Pay End Date	Empl ID	Employee Name	Co	Pay Group	EE Rod#	Dept ID	Position #	Job Code	Off Cycle ?	Page Nbr	Line Nbr	Sep Chk	Debit/ Credit
		0.00			0						0				<input type="checkbox"/>	0	0	0	

[Save](#) [Save / Submit](#) [Approve](#) [Deny](#) [Recall](#)

Paycheck Search | Earnings | Taxes | Deductions | Summary

Export

Summary Tab

Paycheck Search | Earnings | Taxes | Deductions | **Summary**

Payroll Expense Transfer

HRGL Request #: MCCO000605-20200426-002 Status: Searched/Draft Originator: McCoy, Catherine Lo

PET affects the following employees:

PET Summaries are accurate upon completed status. Prior to completion, totals can be verified using the New Check Distribution table on the earnings/taxes/deductions tabs.

PET Combination Summary Personalize | Find | [Print] | [Export] 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 Combination Detail Summary Personalize | Find | [Print] | [Export] First 1-24 of 24



Type	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

PET Detail

Save Save / Submit Approve Deny Recall



Summary Tab

▼ PET Detail Personalize | Find |   First 1-8 of 8 Last

Type	Erncd/Dedcd/Tax	Amount	SpeedType	Account	Check Nbr	Pay End Date	Co	Pay Group	EE Rcd#	Dept ID	Position #	Job Code	Off Cycle ?	Page Nbr	Line Nbr	Sep Chk	Debit/ Credit
ERN	RGS	-1,399.75	11077039	400715	6068733	01/31/2017	CU	MON	1	10839	00665498	1433	<input type="checkbox"/>	2067	1	0	C
ERN	RGS	1,399.75	61000074	400715	6068733	01/31/2017	CU	MON	1	10839	00665498	1433	<input type="checkbox"/>	2067	1	0	D
ERN	RGS	-1,399.75	11077039	400715	6109345	02/28/2017	CU	MON	1	10839	00665498	1433	<input type="checkbox"/>	2183	2	0	C
ERN	RGS	1,399.75	61000074	400715	6109345	02/28/2017	CU	MON	1	10839	00665498	1433	<input type="checkbox"/>	2183	2	0	D
ERN	RGS	-1,399.75	11077039	400715	6151863	03/31/2017	CU	MON	1	10839	00665498	1433	<input type="checkbox"/>	1757	1	0	C
ERN	RGS	1,399.75	61000074	400715	6151863	03/31/2017	CU	MON	1	10839	00665498	1433	<input type="checkbox"/>	1757	1	0	D
ERN	RGS	-1,399.75	11077039	400715	6192946	04/30/2017	CU	MON	1	10839	00665498	1433	<input type="checkbox"/>	1189	2	0	C
ERN	RGS	1,399.75	61000074	400715	6192946	04/30/2017	CU	MON	1	10839	00665498	1433	<input type="checkbox"/>	1189	2	0	D

Ty	Erncd/Dedcd/T	Amou	SpeedTy	Accou	Check N	Pay End Da	Pay Gro	EE Rc	Dept	Position	Job Co	Off Cyl	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	C
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	C
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	C
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	C
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 Transfer MCC000605 Database: HCMTRN

Payroll Expense Transfer Fin Aid / Controllers: Benefits Override: Fin Aid / Controllers Office

HRGL Request #: MCC000605-20200430-001 Status: Searched/Draft Originator: McCoy, Catherine Louise
 Submitted: Submitted by: Created: 04/30/20 12:34AM
 Completed: Last Update: 04/30/20 12:38AM

Paycheck Search Criteria Find | View All First 1 of 1 Last

Empl ID* 155950 Position Number* SpeedType*
 Pay Begin Date 04/01/2018 Pay End Date 05/31/2018 Earn Code Employee Name Search Empl Record # Department
 Earnings Begin Date Earnings End Date Include Off-Cycle?: Search for Paychecks Job Code

Send Notification Emails to Originator

Paycheck Search Results Personalize | Find | View All | First 1-3 of 3 Last

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
<input checked="" type="checkbox"/>	04/30/2018	03/31/2018	<input type="checkbox"/>	155950	0	30063	00652347	1310	F12	3,871.22	833.06	636.53
<input checked="" type="checkbox"/>	04/30/2018	04/30/2018	<input type="checkbox"/>	155950	0	30063	00652347	1310	F12	3,871.22	833.06	636.53
<input checked="" type="checkbox"/>	05/31/2018	05/31/2018	<input type="checkbox"/>	155950	0	30063	00652347	1310	F12	3,871.22	833.06	636.53

Ad Hoc Department Approvers (If Needed)

Department Approver 1
Empl ID:

Department Approver 2
Empl ID:

Department Approver 3
Empl ID:

Attachments Personalize | Find | View All | First 1 of 1 Last

Attached File	Description	Add Attachment	Attached By	Last Update Date/Time
1		Add Attachment		

Comments Personalize | Find | View All | First 1 of 1 Last

Comment	Date/Time Created	Added by User

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>

Header

Paycheck Search & Results

AD HOC Approvers

Attachments Comments

Events Actions

Header, Ad Hoc, Attachments, Comments, Event Tracking

Paycheck Search | Earnings | Taxes | Deductions | Summary

Payroll Expense Transfer

Fin Aid / Controllers: Benefits Override: **Fin Aid / Controllers Office**

HRGL Request #: _____ Status: Searched/Draft Originator: McCoy, Catherine Louise
Submitted: _____ Submitted by: _____ Created: 04/26/20 11:27PM
Completed: _____ Last Update: _____

Ad Hoc Department Approvers (If Needed)

Department Approver 1
Empl ID:

Department Approver 2
Empl ID:

Department Approver 3
Empl ID:

Attachments | Personalize | Find | 1 of 1 | Last

Attached File	Description	Add Attachment	Attached By	Last Update Date/Time
1	<input type="text"/>	Add Attachment		

Add Comment

Comments | Personalize | Find | View All | 1 of 1 | Last

Comment	DateTime Created	Added by User
<input type="text"/>		

Event Tracking | Personalize | Find | View All | 1 of 1 | Last

Event Date/Time	Event	User Name	Ad Hoc Details (if applicable)

Save | Save / Submit | Approve | Deny | Recall

Paycheck Search - Header

Paycheck Search | Earnings | Taxes | Deductions | Summary

Payroll Expense Transfer Fin Aid / Controllers:

HRGL Request #: MCCO000605-20200426-002 Status: Searched/Draft

HRGL Request # = USER#####-YYYYMMDD-###

Save | Save / Submit | Approve | Deny | Recall

Paycheck Search | Earnings | Taxes | Deductions | Grant Cert >= 180 | Summary

Payroll Expense Transfer Fin Aid / Controllers: Benefits Override: **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

PET Status

SEARCHED/DRAFT >

- Save with HRGL Request Number
- Add Attachment & Comments;
- May Delete the Entry

SUBMITTED FOR APPROVAL >

- Workflow

APPROVED >

- Waiting to Post to GL with Journal

COMPLETED >

- Posted to FIN via Journal

UNEDITABLE >

- Funding Posted
- PET Recalled or Denied &
- Does Not Reallocate Paychecks



Delete a PET

A PET can be deleted in Searched/Draft status.

- Before SAVE, simply abandon the PET.

Payroll Expense Transfer

Fin Aid / Controllers: Benefits Override: Fin Aid / Controllers Office

HRGL Request #:	Status: Searched/Draft	Originator: McCoy, Catherine Louise
Submitted:	Submitted by:	Created: 05/21/19 3:41PM
Completed:		Last Update:

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

Payroll Expense Transfer

Fin Aid / Controllers: Benefits Override: Fin Aid / Controllers Office

HRGL Request #: MCCO000605-20200426-002	Status: Searched/Draft	Originator: McCoy, Catherine Louise
Submitted:	Submitted by:	Created: 04/26/20 11:02PM
Completed: Message		Last Update: 04/26/20 11:05PM

Are you sure you would like to delete this request? (27000,9)

Submitted for Approval > RECALL/ DENY > Searched/Draft status.

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

Paycheck Search - Ad Hoc Approvers

Ad Hoc Department Approvers (If Needed)

Department Approver 1

Empl ID:

Department Approver 2

Empl ID:

Department Approver 3

Empl ID:

Look Up Empl ID

Search by: begins with

Search Results

Only the first 300 results can be displayed.

View 100 First 1-300 of 300 Last

Name	Department	User ID
------	------------	---------



Attachments & Comments

Personalize | Find | First 1 of 1 Last

Attached File	Description	Add Attachment	Attached By	Last Update Date/Time
1		Add Attachment		

Add Comment

Personalize | Find | View All | First 1 of 1 Last

Comment	DateTime Created	Added by User

Personalize | Find | First 1-2 of 2 Last

Attached File	Description	View Attachment	Attached By	Last Update Date/Time
1 Delson_SCD_Samantha_Mawhinney3_(002).xlsx		View Attachment	McCoy, Catherine Louise	04/20/17 8:14:43PM
2 PET_Delson_m-Fin_COMPENSATION_SUMMARY.pdf		View Attachment	McCoy, Catherine Louise	04/20/17 8:15:08PM

Add Comment


Personalize | Find | View All | First 1 of 1 Last

Comment	DateTime Created	Added by User
Delson's funding on Bridge for Aug/Sep 2016 is being moved to 63009631 consistent with her effort on the project. The speedtype was delayed in creation/being communicated to the department. This PET transfers the salary on 61001341 to 63009631. CLM	04/20/17 8:10:15.000000PM	McCoy, Catherine Louise



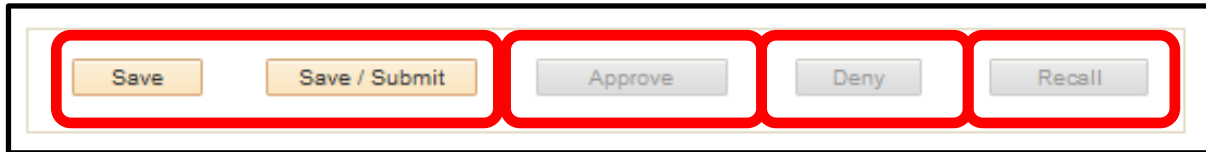
PET Event Tracking

Event 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



SAVE & SAVE/SUBMIT

- Save - HRGL Request # and System Checks
- Save/Submit - Route to Approvers

RECALL

- Submitter pulls back to Saved/Draft Status for Changes
- UNEDITABLE If Recall/Deny with Funding Entry

DENY

- Return to Submitter for Corrections
- UNEDITABLE If Recall/Deny with Funding Entry

APPROVE

- Forwards to the next Approver
- After final approval, changes to Approved status
- Completes with next Journal Cycle



Deny or Recall & Funding Update

Copy Funding Distribution

Apply Funding Template to Future:

Apply to Future Eff Date: 10/08/2017

Funding Template for Copy


SpeedType	SpeedType Description	Account	Fund Code	Department	Program Code
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Stage 2: Grants Approvers

CU_HRGL_ID=YOON000075-20171020-012: **Denied**

Boulder Grants Approver

Denied

 Boulder Grants Approver
11/02/17 - 5:44 PM

Event Tracking [Personalize](#)

Event Date/Time	Event
11/02/17 5:44:54PM	Denied
10/20/17 2:03:29PM	Dept Budget Tables Updated
10/20/17 2:03:26PM	Submitted for Approval
10/20/17 2:03:03PM	Created

Paycheck Search | Earnings | Taxes | Deductions | Grant Cert < 90 | Summary

Payroll Expense Transfer Fin Aid / Controllers: Benefits Override:

HRGL Request #: **Status: Uneditable** Originator:

Campus Workflow

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

Stage 1: Department Approvers

CU_HRGL_ID=MCCO000605-20170420-001:Approved

Department Approver 1

Approved

Alvarado, Crystal
 Department Approver 1
 04/21/17 - 8:23 AM

Stage 2: Grants Approvers

CU_HRGL_ID=MCCO000605-20170420-001:Approved

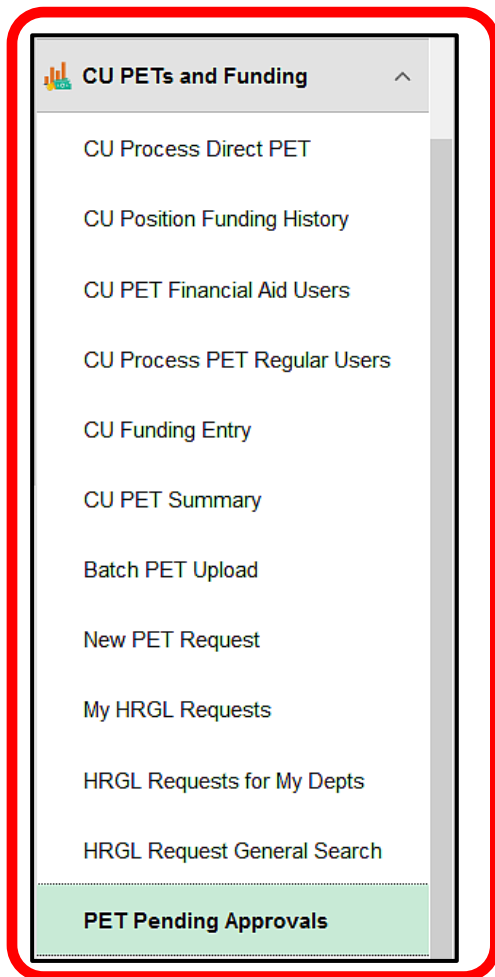
Denver/Ansch Grants Approver

Approved

Mays, Shanelle Vee
 Denver/Ansch Grants Approver
 04/21/17 - 9:53 AM

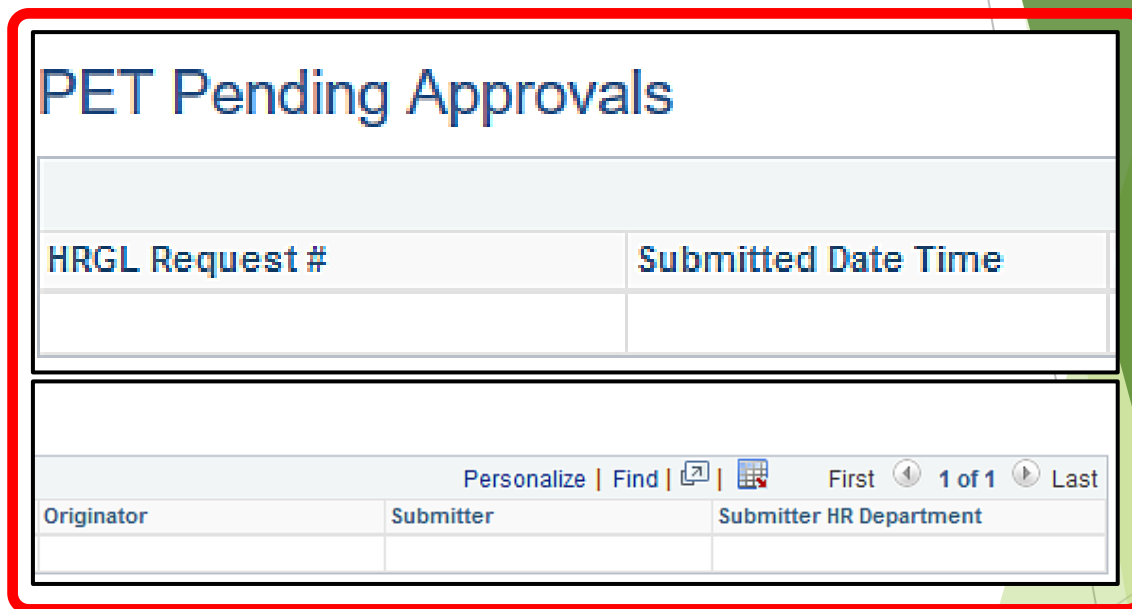


PET Approvers





CU PETs and Funding

- CU Process Direct PET
- CU Position Funding History
- CU PET Financial Aid Users
- CU Process PET Regular Users
- CU Funding Entry
- CU PET Summary
- Batch PET Upload
- New PET Request
- My HRGL Requests
- HRGL Requests for My Depts
- HRGL Request General Search
- PET Pending Approvals**



PET Pending Approvals

HRGL Request #	Submitted Date Time

Personalize | Find |  |  First  1 of 1  Last

Originator	Submitter	Submitter HR Department



Complete the PET - Watch IT

Payroll Expense Transfer | MCCO000605 Database: HCMTRN

Paycheck Search | Earnings | Taxes | Deductions | Grant Cert >= 180 | Summary

Payroll Expense Transfer | Fin Aid / Controllers: Benefits Override: Fin Aid / Controllers Office

HRGL Request #: MCCO000605-20200428-001 | Status: Searched/Draft | Originator: McCoy, Catherine Louise
 Submitted: | Submitted by: | Created: 04/28/20 10:12PM
 Completed: | Last Update: 04/28/20 10:47PM

Paycheck Search Criteria | Find | View All | First | 1 of 1 | Last

Empl ID*: 155950 | Davis, Aaron | Position Number*: | SpeedType*:
 Pay Begin Date: 04/01/2018 | Pay End Date: 05/31/2018 | Earn Code: | Employee Name Search: | Empl Record #: | Department:
 Earnings Begin Date: | Earnings End Date: | Include Off-Cycle?: | Search for Paychecks | Job Code:

Select All | Un-Select All | Send Notification Emails to Originator

Paycheck Search Results | Personalize | Find | View All | First | 1-3 of 3 | Last

Selected	Pay End Date	Earnings End Date	Off Cycle	Empl ID	Empl Red#	Department	Position Number	Job Code	Pay Group	Total Earnings	Total Taxes	Total Deductions
<input checked="" type="checkbox"/>	04/30/2018	03/31/2018	<input type="checkbox"/>	155950	0	30063	00652347	1310	F12	3,871.22	833.06	536.53
<input checked="" type="checkbox"/>	04/30/2018	04/30/2018	<input type="checkbox"/>	155950	0	30063	00652347	1310	F12	3,871.22	833.06	536.53
<input checked="" type="checkbox"/>	05/31/2018	05/31/2018	<input type="checkbox"/>	155950	0	30063	00652347	1310	F12	3,871.22	833.06	536.53

Ad Hoc Department Approvers (If Needed)

Department Approver 1
Empl ID: 138724 | Gafford, Cary

Department Approver 2
Empl ID: |

Department Approver 3
Empl ID: |

Attachments | Personalize | Find | First | 1 of 1 | Last

Attached File	Description	View Attachment	Delete Attachment	Attached By	Last Update Date/Time
1 Additional_Information_for_the_funding_change.docx	Attachment	View Attachment	Delete Attachment	McCoy, Catherine Louise	04/28/20 10:46:51PM

Header - Confirm Completed

Paycheck Search	Earnings	Taxes	Deductions	Grant Cert >= 180	Summary
Payroll Expense Transfer					Fin Aid / Controllers: <input type="checkbox"/> Benefits Override: <input type="checkbox"/> 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	Save / Submit	Approve	Deny	Recall
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PETs are sent to FIN in a single journal at noon and 6 pm daily.
The PETs are available in mFIN the next day.



Payroll Expense Transfers: Today's Topics

Before You Begin a PET

Search for Paychecks

Confirm Paycheck Earnings

Redistribute Earnings Manually

Use the Funding Template

Review Additional Tabs

Complete the PET

Thanks for
joining us.

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

**HCM
HRGL
Webinar**



END