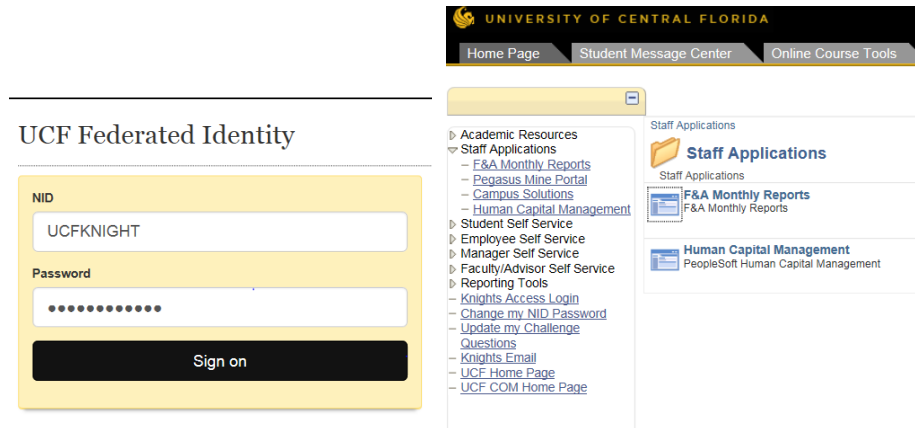




UNIVERSITY OF CENTRAL FLORIDA PEOPLESOFT HUMAN CAPITAL MANAGEMENT SYSTEM REFERENCE GUIDE FOR APPROVERS Salary Cost Transfer eForm

The Salary Cost Transfer eForm should be used to retroactively update the way that employees were paid on their paychecks.

The Salary Cost Transfer eForm is located on the Human Capital Management (HCM) side of PeopleSoft. Log into PeopleSoft through my.ucf.edu and then navigate to Staff Applications – Human Capital Management:



Once in HCM, select "Worklist" and review your worklist to find the Salary Cost Transfer eForms that are awaiting your approval.

You can identify the Cost Transfer eforms by the name of the link. For non-legacy Salary Cost Transfer eforms, the link will say "SALCTRNR" which means that the paychecks were issued after PPE 10/31/2019. For Salary Cost Transfer Legacy eforms, the link will indicate "SACTSFRLG" meaning the paychecks were issued on or before PPE 10/31/2019.

The screenshot shows the 'Worklist' page for user 'he145265: Helena Julie Arpudaraj'. It features a table of worklist items with columns for 'From', 'Date From', 'Work Item', 'Worked By Activity', 'Priority', and 'Link'. The 'Link' column contains dropdown menus with options like 'SALCTRNR Robert Johnson', 'SALCTRNR Jennv Adams', 'SALCTRNR Michael Smith', 'SALCTRNR Elizabeth Sanders', and 'SALCTRNR Ann Smith'. The 'SALCTRNR Michael Smith' and 'SALCTRNR Ann Smith' links are highlighted with red and orange boxes, respectively. There are also 'Mark Worked' and 'Reassign' buttons for each item.

From	Date From	Work Item	Worked By Activity	Priority	Link	Mark Worked	Reassign
Originator	07/26/2019	Notification Worklist	Notification		SALCTRNR Robert Johnson	Mark Worked	Reassign
Originator	07/26/2019	Notification Worklist	Notification		SALCTRNR Jennv Adams	Mark Worked	Reassign
Originator	07/26/2019	Notification Worklist	Notification		SALCTRNR Michael Smith	Mark Worked	Reassign
Originator	07/31/2019	Notification Worklist	Notification		SALCTRNR Elizabeth Sanders	Mark Worked	Reassign
Originator	07/31/2019	Notification Worklist	Notification		SALCTRNR Ann Smith	Mark Worked	Reassign

Whether you are approving a Salary Cost Transfer or a Legacy Salary Cost Transfer eform, the approval process is the same. However, the eForms will look different depending on which type of form you are reviewing.

Approving a Salary Cost Transfer eForm

UCF

Evaluate Salary Cost Transfer

Step 1 of 2: Evaluate Salary Distribution

Review, and revise if needed, the salary cost transfers requested below.

eForm ID: 47236

Paycheck Information

Emp ID: 3100000 Emp Record: 0 Name: Michael Smith

Pay Period End Date: 05/16/2019 Earnings: \$6710.72 Paycheck Number: 4033550 Selected

Job Information

Effective Date	Department	Payroll Status	Job Code	Job Description	Position Number	Pay Group	Employee Class	FTE	Compensation Rate
05/06/2019	16402001	Active	5002	Associate Professor	00030174	SMO	Fac/ASP Regular	1.000000	\$6710.717436

Earnings

Current Distribution		New Distribution Details	
Earnings Code	Earnings End Date	Earnings Code	Earnings End Date
Regular	05/16/2019	Regular	05/16/2019
Regular	05/16/2019	Regular	05/16/2019
Totals		Totals	
Earnings Code	Earnings End Date	Earnings Code	Earnings End Date
Regular	05/16/2019	Regular	05/16/2019
Current Distribution		New Distribution	
\$6710.72		\$6710.72	
Difference		\$0.00	

Affirmation Statement

By submitting this form, I certify that the cost to be transferred is an appropriate expenditure for the funding source charged, and that the expenditure complies with any terms and regulations governing that funding source.

Add File Attachment

Comments

Your Comment:

Comment History:

Wed, Jul 31 10, 04:00:07 PM

Approve Deny Recycle Hold

Job Information Section: Displays the employee's job code, position number, and compensation rate as of the pay period's effective date that you selected.

Current Distribution Section: Indicates the current funding distribution.

New Distribution Section: This section of the eform will auto-populate the earnings and combination codes that are currently listed for the employee effective the pay period that you selected. You will override this information and enter the new earnings and account information in the boxes provided.

Totals: The "Current Distribution" and the "New Distribution" must be equal or you will not be able to submit the eform. The "Difference" should always be zero.

After reviewing the form, go to the bottom of the form and you will be able to write a comment and select one of the four options for processing the eform.

Affirmation Statement

By submitting this form, I certify that the cost to be transferred is an appropriate expenditure for the funding source charged, and that the expenditure complies with any terms and regulations governing that funding source.

Add File Attachment

Comments

Your Comment:

Comment History:

Wed, Jul 31 10, 04:00:07 PM

Approve Deny Recycle Hold

Approve: Use this button to indicate that everything appears to be fine on the eform.

Deny: Use this button to stop this eform from progressing any further. If you select this option, then the originator will need to start an entirely new eform if any action is still required as this eform will no longer be editable.

Recycle: Use this button to send an eform back to the originator for a correction/update. Be sure to include comments to the originator as to what needs to be reviewed and/or changed.

Hold: Use this button if you would like to keep the eform on your worklist and would like to leave a comment on it while you decide how to proceed.

If you chose "Approve" then the form will begin to route through the workflow.

Approving a Salary Cost Transfer Legacy eForm

UCF

Evaluate Salary Cost Transfer Legacy

Step 1 of 2: Evaluate Salary Distribution Legacy

eForm ID: 672280

Paycheck Information

Empl ID 3100000 Empl Record 0 Name Michael Smith

Pay Period End Date 05/17/2018 Total Gross \$6523.55 Paycheck Number 3714509 Selected

Job Information

Effective Date	Department	Payroll Status	Job Code	Job Description	Position Number	Pay Group	Employee Class	FTE	Compensation Rate
05/08/2018	16402001	Active	9001	Professor	0003237	SMO	Fac/ASP Regular	0.550000	55606.167755

Earnings Re-distribution

Reverse Labor	Account	Fringe Rate %	Combination Code
\$-200.00	712104	0.200	16400074

Reverse Fringe

Reverse Fringe	Fringe Account	Department	Project
-40.00	712610	16400710	192000

New Earnings Distributions

Earnings	Combination Code	Department	Project	Account
\$200.00	16400710	16400710		192000

New Fringe Distributions

Fringe Amount	Combination Code	Department	Project	Account
\$40.00	16400710	16400710		712610

Affirmation Statement

By submitting this form, I certify that the cost to be transferred is an appropriate expenditure for the funding source charged, and that the expenditure complies with any terms and regulations governing that funding source.

Add File Attachment

Comments

Your Comment:

Comment History:

Wed Jul 31 10:03:15:20 PM Submitted

Approve Deny Recycle Hold Save Return to Search Notify

Job Information Section: Displays the employee's job code, position number, and compensation rate as of the pay period's effective date that you selected.

Earnings Re-distribution Section: Enter the amount of money that you would like to transfer from a particular account in the "Reverse Labor" box. You will then enter the combination codes and GL accounts where you would like to move the money. You can move it to multiple

accounts or just one account. If you would like to move it to multiple accounts, then you will need to click the "+" symbol at the end of the line to add a second account.

Calc Fringe: Click to calculate the fringe amount.

New Fringe Distribution: Displays information regarding the fringe amount, after you click the "Calc Fringe" button.

After you review the new combination codes and make sure that the transfer amounts are accurate, you can go to the bottom of the form and you will see the same options that you saw on the non-legacy version of the eform.

You can select one of the following:

1. Approve
2. Deny
3. Recycle
4. Hold

If you approve the form, then the form will proceed through the rest of the approval workflow.

eForm Routing

After the form has been approved, you will be taken to a confirmation screen.

A process visualizer will show you where the eform is located in the approval workflow.

View Salary Cost Transfer

Step 2 of 2: Form History

Form Information	
eForm ID	672283
Form Status	Part Apprv
Form Type	SALCTRNSFR Salary Cost Transfer
Condition	DEFAULT Default
Next Approver	GT Dept Research Coor
	Who can work this form? Form Messages

Process Visualizer

```
graph LR; S1[1: Originator] --> S2[2: GT SCT Dept Approver  
(18 days  
18 hours  
52 minutes)]; S2 --> S3[3: GT Department Research Coor]; S3 --> S4[4: GT SCT Approver]; S4 --> S5[5: GT Financial Aid]; S5 --> End(( )); style S3 stroke:#00aaff,stroke-width:2px; style End fill:none,stroke:none;
```

The Process Visualizer shows a sequence of five steps: 1: Originator, 2: GT SCT Dept Approver (18 days, 18 hours, 52 minutes), 3: GT Department Research Coor (highlighted with a red arrow and a blue border), 4: GT SCT Approver, and 5: GT Financial Aid. A red arrow points to step 3, and a blue border highlights the step's box.

Note that this reference guide is meant to supplement, not replace the PSC109 – Salary Cost Transfer eForm course for Approvers.

If you have questions regarding the Salary Cost Transfer eform, please email HRIS@ucf.edu. Thank you!