



PET Checklist

Actions to Complete:

Justification in the Grants Certification Tab: Provide a detailed description explaining the need for the Payroll Expense Transfer in the Grants Certification tab of the PET in HCM. Include in the description:

- Who, What, Why, When and Value (dollars or percentage) the transfer is being requested for and how the receiving project benefits from the expense?
- The reason the expense was incorrectly charged originally.

Be sure to include the original and new Speedtypes, the employee name and EIN or POS number, and the percent of effort or total dollars being adjusted between Speedtypes. The written justification should confirm the adjustments entered in the system.

For requests greater than 90 days from the transaction date, the justification ***must*** also address:

- The reason the request was not submitted within 90 days of the transaction date
- How requests greater than 90 days old will be prevented in the future

It is expected that all expenses on sponsored projects (personnel and non-personnel) are reviewed monthly for accuracy and adjustments are made as soon as possible when an error is recognized.

Special Circumstances: For requests where the Earnings Date is paid in a different pay period:

- Clearly confirm the discrepancy and provide additional details within the justification
For example, Off-Cycle pay was for Employee "A's" effort performed in January 2017, however, was paid in March 2017 because "A" was out of town and submitted their time sheet to HR late on 03/12/2017...

Upload Required Attachments:

- Completed PET Checklist
- Employee Salary Spreadsheet if the employee is paid from multiple sources.

*Example Template may be found **here**; if an alternate template is used it must include:*

- Employee Name/EIN
 - Payroll periods to be adjusted in the PET
 - % Effort/Payroll for each Project/Speedtype
 - Clear calculations of the change between prior and new values
- Email communication/confirmation of approval if transferring between departments.
 - Email communication/confirmation of approval if requestor is different than the creator.

Upload Optional Attachments:

- Payroll Transaction Report or Financial Detail highlighting the months of payroll to be moved. (highly encouraged if the PET is for more than one employee pay period)
- Any additional budgets, spreadsheets, or award documentation to further support/fully explain the request.