Salary, Planning, and Distribution
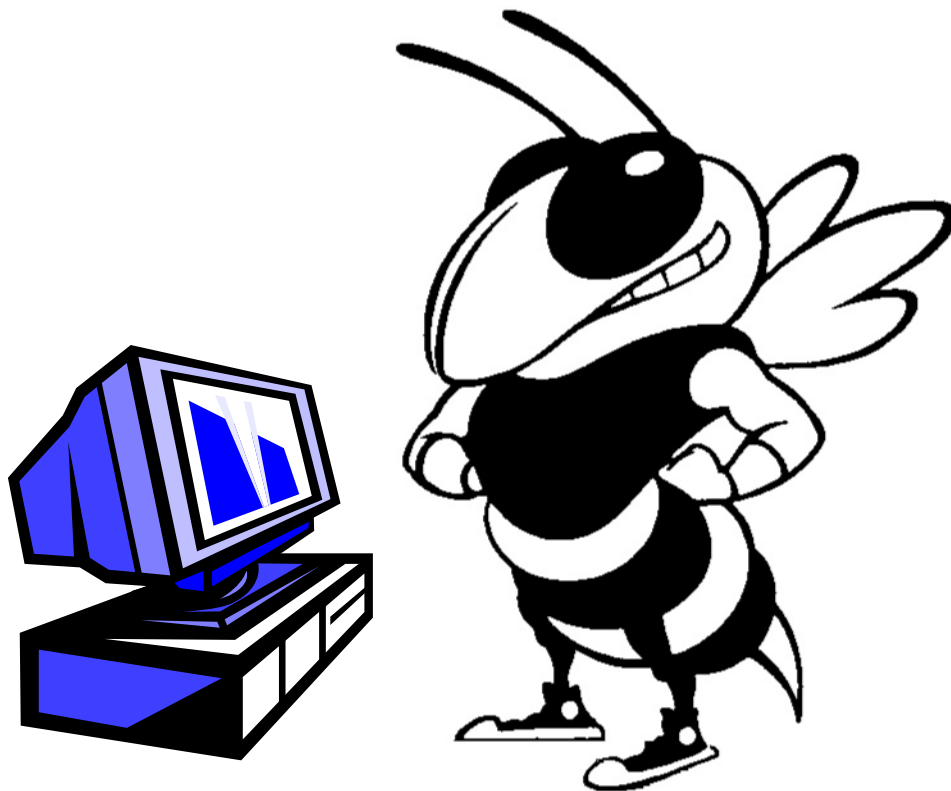
Georgia Institute of Technology
HRMS 9.2 Training Guide

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Section 1: Overview

The electronic redistribution of personal service costs is a form of cost transfer involving the movement of personal service costs from a non-sponsored project to a sponsored project, or from a sponsored project to any other project. The matter of personal services cost transfers is a sensitive issue in the university's operation of its sponsored programs and receives careful scrutiny by sponsor representatives, especially federal government contracting officers and auditors.

The PeopleSoft based SPD (Salary Planning & Distribution) system will be used to enter salary plans and to redistribute incurred salary costs posted to the General Ledger to properly reflect actual time and effort activity.

The PeopleSoft based SPD system will NOT be used to enter salary and account information for new employees, transferring employees, promoted employees, or employees getting job upgrades via an approved Office of Human Resources process. A new PSF (Personal Services Form-located on the TECHWORKS web site) will be used for these job actions. SPD will NOT be used to enter salary amounts for a new fiscal year. This information will be entered into the Budget system using instructions and forms issued by the Budget Office.

Any changes required that move charges from one department to another must be approved by both departments. This approval may happen in one of two ways:

One of the units may grant permission to the other unit to make the change on-line, or

Both units may submit an approved Monthly Employee Cost Detail and a SPD Transmittal Form to the Grants and Contracts Accounting Office/SPD Center. If a unit wishes to grant permission to another unit's staff member to make changes, they should submit a written request to the Grants and Contracts Accounting Office/SPD Center.

The request should indicate the name of the person given permission to make the changes and should also list their user ID. Be aware that once an individual has been given permission to make changes for a particular organization, that person has access to all persons and projects that work for that organization.

Security and Access

Users of the SPD module will be allowed to access employees of the organizations/projects for which they are responsible. If an employee has joint appointments in two or more organizations/projects, users will be able to view all distributions of the employee's salary; however, they may only make changes to move expenses from the other organization's project to their own project unless written approval has been granted.

Logging On

Go to **techworks.gatech.edu**
Enter your GT Account and password.

TechWorks is the gateway to all administrative functions, forms, links, and reports – everything you need in one place.

Contact the OIT Help Desk at 404-894-7173 if you need help with your GT Account or password.

Once you are in Techworks, you can access Salary Planning & Distribution from the "My Work" tab under the Applications and Resources section.

Click " **Salary Planning & Distribution** "

Menu Navigation

Click on the link for the page you want to use. Once you are in the SPD application you will then use the menu to navigate from page to page.

SPD Transactions

Update
Past Pay Period Project Change
Past Pay Period Posn Nbr Chg
Future Pay Period Changes
Summer Encumbrance Build

Inquiry
Future Pay Details
Future Pay Update History
Past Pay Period by Date/Period
Past Pay Update History
SPD Detail

Reports
Monthly Employee Cost Detail
Monthly Project Dtl - Past Prd
Monthly Project Detail - GL
Undesignated Sponsored Summary
Undesignated Sponsored Detail
Monthly Salary Dist Change Sum
Monthly Salary Dist Change Dtl
Salary Distribution Change Sum
Salary Distribution Change Dtl
Workload Assignment Report

PeopleSoft displays the SPD menu.
- ➢ **Update**
  - ▪ Past Pay Period Project Change
  - ▪ Past Pay Period Posn Nbr Chg
  - ▪ Future Pay Period Changes
  - ▪ Summer Encumbrance Build
- ➢ **Inquire**
  - ▪ Future Pay Details
  - ▪ Future Pay Update History
  - ▪ Past Pay Period by Date/Period
  - ▪ Past Pay Update History
  - ▪ SPD Detail
- ➢ **Reports**
  - ▪ Monthly Employee Cost Detail
  - ▪ Monthly Project Dtl - Past Prd
  - ▪ Monthly Project Detail – GL
  - ▪ Undesignated Sponsored Summary
  - ▪ Undesignated Sponsored Detail
  - ▪ Monthly Salary Dist Change Sum
  - ▪ Monthly Salary Dist Change Dtl
  - ▪ Salary Distribution Change Sum
  - ▪ Salary Distribution Change Dtl
  - ▪ Workload Assignment Report

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Section 2: Update Panels

Past Pay Period Project Changes

Navigate: Salary Planning and Distribution>Update> Past Pay Period Project Change

Past Pay Period Project Change

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

Find an Existing Value

▼ Search Criteria

Search by: Empl ID   ▼   begins with [   ]

[Search]   Advanced Search

Past Pay Period Changes Panel Search

Past Pay Period Project Change

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

Find an Existing Value

▼ Search Criteria

Search by: Empl ID   ▼   begins with [   ]

Business Unit
Company
Empl ID
[Search]   A(GL ORG value
Last Name
Name
Project/Grant

♦ Select the employee record for a basic search (use the Advanced Search selection criteria fields to narrow your search)

PeopleSoft Employee ID Number - all records for that particular employee

Business Unit/Company - all records of employees (for which you have access) for Business Unit/ Company.

GL ORG value - all records for that Organization in Employee ID Number order.

Project/Grant Number - all records for that Project/Grant Number in Employee ID Number order.

Name field - there is no space between comma and first name, use upper and lower case letters—example: Last,First records for that particular employee are displayed.

Last Name - all records of employees (for which you have access) with that given last name, also in order by Employee ID Number.

Note: If you do not enter any selection criteria, all employees (you are authorized to view) will be displayed. The number of records displayed are limited however.

Click Search or hit "Enter" key.   A selection box will display the results of your search.   **"Note if the employee has multiple Empl Rcd Nbr's."**

Past Pay Period Project Change

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

| Find an Existing Value |

▼ Search Criteria

Search by: [Empl ID ▾] begins with [82150]

Search Advanced Search

Search Results

View All			First ◀ 1 of 3 ▶ Last		
Empl ID	Name	GL ORG value	Project/Grant	Empl Record	Last Name
82150	Smith,Jon	160	160131Q	0	SMITH
82150	Smith,Jon	160	1606BAA	0	SMITH
82150	Smith,Jon	160	1606BEC	0	SMITH

Select by double clicking on the record or hit "Enter" key if only one empl rcd.

PeopleSoft displays **Name, Employee ID, Record Number and FTE** for the record you selected. The current fiscal year is displayed.

Accounting Period(s) or Pay Period(s)   Required

♦ **Enter** the Accounting Period or Pay Period End dates you wish to change. The Accounting Period should be used for monthly employees. (Example: Period 1 represents the first month of the fiscal year—July, and Period 12 represents June).

♦ Pay Period End date is best used for bi-weekly employees, when you wish to change only one pay period.

♦ **Tab** to "Thru:" box and enter the ending accounting period you want changes to be effective through.

♦ **Press** Tab on the keyboard and the Select button will activate.

♦ **Click on** Select

The records for the accounting/pay period will be displayed. If period range is over 90 days old, then you will receive a warning message (See 90 day late moves for detail).

PeopleSoft will now present all data that meets criteria for the person selected and for the Accounting Period(s) and fiscal year indicated.

Project/Account Distribution Displayed

♦ The project distribution may consist of more than one Account/Object within a project. Use the **Project** Find | View All First ◀ 1 of 7 ▶ Last **Navigation Bar to view multiple Project Numbers.** View All will display all Projects while the First ◀ 1 of 4 ▶ Last arrows move from project to project .

♦ The Selected Total is the total salary paid across all projects and account/object codes for the person and period selected.

♦ If the Selected Total is not equal to the amount of the Project you are viewing, you have more than one project for the criteria selected.

♦ Once you have navigated to the project you would like to change, click on Use This Proj/Acct

♦ The Project information will then appear in the "From Project" and "Account" area.

- ♦ To select the "To Project" click on Edit Chartfields link. If you know the project number you wish to distribute changes to, enter it in the "Combination Code" field; otherwise, select the 🔍 and double click on the project from the list. (This list is limited in the number of projects it will display however). Hit "Enter" Key and click "OK" button to return to Past Changes panel.

Justification For Externally-funded Sponsored Projects

If a change is made **TO** an externally-funded sponsored project**, you are required to enter a justification after the "TO" project selection from "Edit Chartfield" link. A Justification box will appear on the screen. This information must be entered before the system will allow any changes to be saved.

- ♦ Click on the [Justification] box
- ♦ Select a justification by clicking on the **drop down arrow** one of the five general Justification Reasons or if "Other", enter a detailed explanation.

Cost Transfer Justification   ×

                                                                                                      Help

Select From Listing Below:

Reason

1. Correction of labor charges based on review by employee, PD/PI, or authorized delegate.
2. Correction of clerical error or data input error identified by authorized unit financial personnel.
3. New Award costs incurred during the award period charged temporarily to other allowable funds pending establishment of new award/fund.
4. Allowable Pre-award costs (incurred prior to the award period) initially charged to other allowable funds.
5. Renewal award costs charged originally to a prior sponsored increment or to other allowable funds.
6. Other: Specify
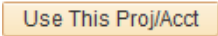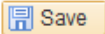
OK	Cancel
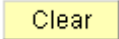
The Justification Reasons are listed as follows:
- 1. Correction of labor charges based on review by employee, PD/PI, or authorized delegate.
- 2. Correction of clerical error or data input identified by authorized unit financial personnel.
- 3. New Award costs incurred during the award period charged temporarily to other allowable funds pending establishment of a new award/fund.
- 4. Allowable pre-award costs (incurred prior to the award period) initially charged to other allowable funds.
- 5. Renewal award costs charged originally to prior sponsored increment or to other allowable funds.
- 6. Other: Specify

♦ Click on the appropriate **Justification** you wish to select. If you selected Reason 6. "Other: Specify", enter a detailed justification in the text box that appears.

♦ Click on OK to go back to the Past Pay Change panel.

♦ Tab or click on the **Amount field** and enter the amount of the redistribution desired. **You can only enter up to the amount on the Acct Distribution Line.** (Note that all Past Pay Period Changes are entered in dollar amounts for the projects/periods/persons selected. If multiple accounting or pay periods are selected, PeopleSoft will prorate the amounts entered over all the projects selected.)
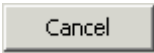
> **NOTE: Any adjustments to move negative amounts between projects (payroll voids, for example) must be made through the Grants and Contracts SPD Center. PeopleSoft will not allow the movement of negative amounts between projects.**

- Use the Tab key **(Not Enter)** and the Apply button activates.

- Click on the [Apply] button.

- The redistributed total shows the total amount of the changes made and takes the information from the amount field and adds to the project distribution selections.

- **Multiple changes** - If you need to make multiple redistributions from the same project, click on the [Use This Proj/Acct] button again and enter the next project using the "Edit ChartField" link. The Justification button will appear again if the project is an externally funded sponsored project. Select a new Justification and OK. Then tab/click Amount field and enter the amount of the redistribution desired. Tab (**Not Enter**) to Apply button and click. Repeat process for next project from the same project. When all desired redistributions are made from the same project and applied, click on the [Save] button (at bottom left of page).

Note: If you made a change to an individual and saved the information, you will want to clear the panel (Clear), and refresh the screen **before making any additional changes to the same individual** for a different accounting period.

- If the information is not correct and you have not "SAVED", and you wish to begin again with the same employee, click on the [Clear] button (bottom left hand corner of screen).

- If the information entered is incorrect, has not been "SAVED" and you wish to view another person or account or if you wish to end the entire session, click on the [Return to Search] **button** (bottom menu bar). You will get this message:
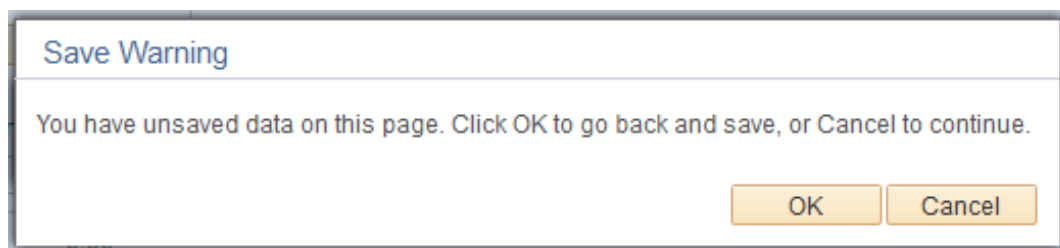
Save Warning

You have unsaved data on this page. Click OK to go back and save, or Cancel to continue.

[OK] [Cancel]

- Click the [Cancel] button and the entire panel will be cancelled and no changes will be committed.

- Past Pay Period changes will be effective immediately. New reports produced will reflect changes.

Over - 0 Day Late Redistributions

If a change is made more than **90 days** after the original posting, a Warning Message will appear on the screen. This warning will advise you to select a more current accounting period if you are to make a redistribution to an externally funded sponsored project. **Note: **Exclusions - Projects funded by GTF UbX ; HF 7ž UbX transfers between projects with the same fund code UfY bch gi V^YVd hc H Y 90 day limit or Justification requirement.**

Message

Accounting Period / Pay Period Greater than 90 Days (20000,132)

WARNING:
You have selected an accounting/pay period end date that is over 90 days.
If you are making re-distributions to sponsored projects, please revise your accounting period.

OK

#
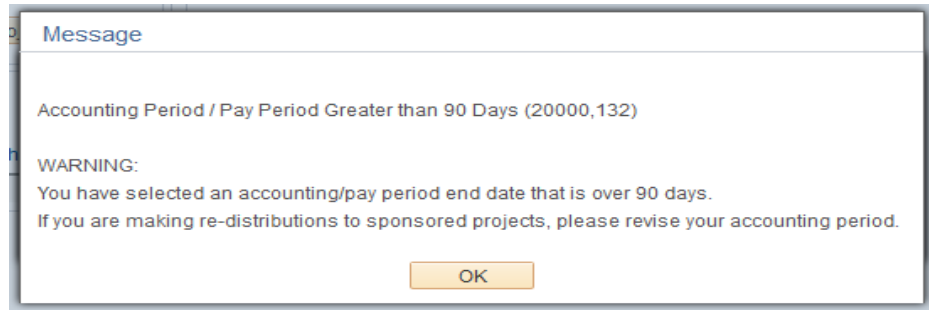
♦ If you are **not** making a change to an externally funded sponsored project, click the "OK" button. Select From Project [Use This Proj/Acct]

♦ Proceed with your "TO" project selection with [Edit ChartFields] Link and enter your Project. If you enter an externally funded sponsored project in the Edit Chartfield link for the "TO Project", you will receive this error message:

Message

Project Number Selection Not Valid over 90 Days (20000,137)

ERROR:
You have selected a project number that is invalid for re-distributions over 90 days.
Re-distributions to sponsored projects after 90 days requires approval and processing through Grants and Contract Accounting.
Please select a new project number that is not sponsored or revise your accounting periods selected.

OK

SPD will not allow you to complete the redistribution and you will need to select a nonexternally funded sponsored project or cancel the transaction.

For over - 0 day redistributions to externally funded sponsored projects, you will have to submit an SPD transmittal form Vd a d`Yh]b[H Y Cj Yf - $ 8U m GYVd cb hc the SPD Center for approval by the Director of Grants and Contracts Accounting. the Assoc Vice President of Financial Services , and the Assoc Vice Provost for Research. If the transaction is approved, the SPD Center will make the redistribution for the departments.

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Future Pay Period Changes

Navigation: Salary Planning Distribution / Update / Future Pay Period Changes

Future Pay Period Changes

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

Find an Existing Value

▼ Search Criteria

Search by: Empl ID ▼ begins with _____

| Business Unit |
| Company |
| Empl ID |
| Fiscal Year |
| GL ORG value |
| Last Name |
| Name |
| Project/Grant |

Search Ad

♦ Select the employee record for a basic search (use the _Advanced Search_ selection criteria fields to narrow your search)

PeopleSoft Employee ID Number - all records for that particular employee

Business Unit/Company - all records of employees (for which you have access) for Business Unit/ Company.

Fiscal Year - all records for that Fiscal Year (for which you have access) in Employee ID Number order.

GL ORG value - all records for that Organization in Employee ID Number order.

Last Name - all records of employees (for which you have access) with that given last name, also in order by Employee ID Number.

Name field - there is no space between comma and first name, use upper and lower case letters—example: Last,First. records for that particular employee are displayed.

Project/Grant Number - all records for that Project/Grant Number in Employee ID Number order

Note: If you do not enter any selection criteria, all employees (you are authorized to view) will be displayed. The number of records displayed are limited however.

Click Search or hit "Enter" key.   A selection box will display the results of your search.

Future Pay Period Changes

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

| Find an Existing Value |

▼ Search Criteria

Search by: Empl ID ▼ begins with 99999

Search   Advanced Search

Search Results

View All					First ◄ 1-5 of 5 ► Last	
Empl ID	**GL ORG value**	**Project/Grant**	**Empl Record**	**Fiscal Year**	**Name**	**Last Name**
99999	160	160131Q	0	2016	Jon Smith	SMITH
99999	160	1606680	0	2016	Jon Smith	SMITH
99999	160	1606BAA	0	2016	Jon Smith	SMITH
99999	160	1606BEC	0	2016	Jon Smith	SMITH
99999	160	1606BHG	0	2016	Jon Smith	SMITH

Select by double clicking on the record if multiple Empl Rcd Nbrs or hit "Enter" key. PeopleSoft displays **Name, Employee ID, Record Number and FTE** for the record you selected. The current fiscal year is displayed

Fiscal Year/Accounting Period

♦ The screen will display the last Future period created for the current fiscal year. You must use the `Find | View All   First ◀ 1 of 7 ▶ Last` **Navigation Bar** to access other future accounting periods in the current fiscal year. Future Periods will be grayed-out if already past, you can only make changes for the future.

NOTE: There is **a "gray out"** period when no changes will be allowed for the **CURRENT** accounting period only. This "gray out" occurs because the Payroll Office has begun the process of running the payroll and any changes you enter during this period would not be reflected on the issued paycheck. At this point, you must wait until the payroll posts and then enter a Past Pay Period Change. The current accounting period will actually be gray on the screen.
"Blackout" days are when PeopleSoft is unavailable due to month-end processing.

Navigate down using `Find | View All   First ◀ 1 of 7 ▶ Last` to the appropriate accounting period in which you want the change to start. `View All` will display all Future Periods or `First ◀ 1 of 7 ▶` arrows will navigate from period to period. If an accounting period is not shown, you can insert one by clicking on the `+` button in the accounting period line. Use the `Insert Accounting Period` button if all accounting periods are grayed out.

➢ NOTE: Any change will continue in effect until the end of the fiscal year unless another future accounting period in the fiscal year is in PeopleSoft. **But keep in mind that if you delete several accounting periods in a row to shortcut redistributing each period, any non-SPD**
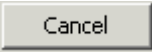
> **actions that hit the Job Panel in HR may change the distribution if it hits during one of these deleted periods in the SPD Future Panel.**
> ➢ For example, if you change the distribution for period 3 from 100% Project A to 50% to Project A and 50% to Project B, that distribution will remain until the next pay period distribution shown in PeopleSoft. (You can determine the next distribution by using the arrow buttons.)
> ➢ If you wish for the change to be effective only for Period 3 and 4, you must change Period 5 to reflect the distribution you want for the remainder of the year.

♦ If the Accounting Period in which the current distribution **began** has passed, the Future Pay Period Changes panel will be grayed out and changes will not be available.

♦ For most Fiscal and Academic employees with a consistent pay distribution, all accounting periods should be populated. For group positions or new hires, only one to three accounting periods may be populated. To insert a new accounting period. Click on the **+** button on the Accounting Period line. To delete an accounting period, click on the **−** button on the Accounting Period line.

Project/Percent

♦ Enter the percent and project number for the future distribution(s). Type in the new project number or choose from a list via the drop down arrow

♦ **Inserting a new row** - If you need to add a row for a new percent project distribution, click on the **+** button on the project distribution line. To delete a project distribution row, click on the **−** button on the project distribution line..

♦ If you wish to make more than one change, **insert** another row and make additional changes **before saving.** Review the information and if it is correct and complete, click on the 🖫 Save button (bottom left corner of page).

♦ If the information is incorrect and has not been saved, cancel out of the panel by clicking on the 🔍 Return to Search icon. You will get this message:

Save Warning

You have unsaved data on this page. Click OK to go back and save, or Cancel to continue.
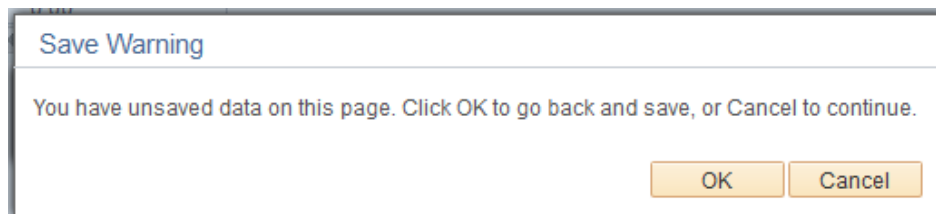
OK   Cancel

♦ Click the [Cancel] button and the entire panel will be cancelled and no changes will be committed.

♦ Future Pay Period changes will be reflected on the on-line panels immediately and on the Monthly Employee Cost Detail Report; however, project reports produced on the same day will not reflect changes. Changes will be reflected on reports the following business day, after batch processes are run.

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Past Pay Period Position Number Changes

Navigation: Salary Planning Distribution/Update Pages /Past Pay Period Posn Nbr Changes

Past Pay Period Posn Nbr Chg

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

Find an Existing Value

▼ Search Criteria

Search by: Empl ID ▾ begins with _____

| Business Unit |
| Company |
| **Empl ID** |
| GL ORG value |
| Last Name |
| Name |
| Project/Grant |

Search Ad

♦ Select the employee record for a basic search (use the *Advanced Search* selection criteria fields to narrow your search)

> **PeopleSoft Employee ID Number** - all records for that employee.
>
> **Business Unit/Company** - all records of employees (for which you have access) for that Business Unit/ Company.
>
> **GL ORG value** - all records for that organization in Employee ID Number order.
>
> **Last Name** - all records of employees (for which you have access) with that given last name, also in order by Employee ID Number.
> If you do not enter any selection criteria, all employees (you are authorized to view) will be displayed.
>
> **Name** field - there is no space between comma and first name, use upper and lower case letters—example: Last,First. records for that particular employee are displayed
>
> **Project/Grant Number** - all records for that Project/Grant Number in Employee ID Number order.
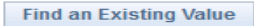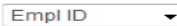
Click [Search]   A selection box will display the results of your search.
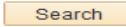
Past Pay Period Posn Nbr Chg

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

| Find an Existing Value |

▼ Search Criteria

Search by: | Empl ID ▼ | begins with | 99999 |

[Search] Advanced Search

Search Results

View All				First ◄ 1-4 of 4 ► Last	
Empl ID	Name	GL ORG value	Project/Grant	Empl Record	Last Name
99999	Jon Smith	160	160131Q	0	SMITH
99999	Jon Smith	160	1606BAA	0	SMITH
99999	Jon Smith	160	1606BEC	0	SMITH
99999	Jon Smith	160	1606BHG	0	SMITH
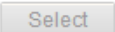
Select by double clicking on the record or press "Enter" on the keyboard.

PeopleSoft displays **Name, Employee ID, Record Number and FTE** for the record you selected. The current fiscal year is displayed.

Past Pay Period Posn Nbr Chg

Name: Jon Smith   ID: 99999   Rcd#: 0 FTE: 0.367500   Monthly Employee Cost Detail

Selection FY: 2016   Accounting Period(s): [   ] 🔍   Thru: [   ] 🔍   [Select]
Criteria: Pay Period End Date(s): [   ] 🔍 Thru: [   ] 🔍

                                    Find | View All   First ◄ 1 of 1 ► Last
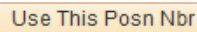
                                        Find | View All   First ◄ 1 of 1 ► Last
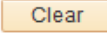
Project   **Amount**
Distribution: 0.00

                                        Find | View All   First ◄ 1 of 1 ► Last

Position   **Amount**
Distribution: 0.00   [Use This Posn Nbr]
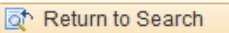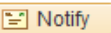
                        Selected Total: 0.00
Confirm   [Apply]
Transfer: From   Position Nbr   Department   JobCode
[Clear]   To   [   ] 🔍   [   ] 🔍   [   ] 🔍   *Amount: [0.00]
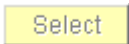
                                    Redistributed Total: 0.00

[💾 Save] [↩ Return to Search] [✉ Notify]

Accounting Period(s) or Pay Period(s): Required

♦ **Enter** the Accounting Period or Pay Period End dates you wish to change.
   The Accounting Period should be used for monthly employees. (Example:
   Period 1 represents the first month of the fiscal year—July, and Period 12
   represents June).

- Pay Period End date is best used for bi-weekly employees, when you wish to change only one pay period.

- **Tab** to "Thru:" box and enter the ending accounting period you want changes to be effective through.

- **Press** Tab on the keyboard and the Select button will appear.

- **Click on** Select

The records for the accounting/pay period will be displayed.

PeopleSoft will now present all data that meets criteria for the person selected and for the Accounting Period(s) and fiscal year indicated.

Project/Position Distribution: Displayed

- If there are **multiple Projects, use the** Find | View All First ◀ 1 of 4 ▶ Last **Navigation Bar above the Project Line.** View All will display all Projects while the First ◀ 1 of 4 ▶ Last arrows move from project to project

- The project distribution may consist of more than one Position within a project. Use the Find | View All First ◀ 1 of 4 ▶ Last **Navigation Bar** above

the Position Distribution line to view multiple Position Numbers. The Position/ Department/ Job Code distribution may be changed but should follow a PSF action to Human Resources (HR), otherwise future payrolls will continue to code the position Number according to HR Panels.   Changes in Position Number must be done via a PSF form (HR Administration/Forms/Pesonnel Action Forms web page in TECHWORKS).

♦ The Selected Total is the total salary paid across all projects and positions for the person and period selected.

♦ If the Selected Total is not equal to the amount of the Project you are viewing, you have more than one project for the criteria selected.

♦ Once you have navigated to the project and position you would like to change, click on Use This Posn Nbr.

♦ The Project information will then appear in the "Confirm Transfer" area.

♦ If you know the position number you wish to distribute changes to, enter it in the "To Position" field; otherwise, select the 🔍 and double click on the position from the list. You may also change Department and Job Code but SPD will only accept valid data associated with the new Position Number.

Confirm Transfer:		Position Nbr	Department	Selected Total:	2,821.27 JobCode	Apply	
	From	00007012	160		200S00		
Clear	To		160 🔍		200S00 🔍	*Amount:	0.00

Redistributed Total: 0.00

💾 Save   🔍 Return to Search   📧 Notify
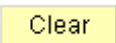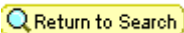
♦ Tab to **Amount field** and enter the amount of the redistribution desired. Note: You can only enter an amount up to the amount on the Position Distribution line, **NOT THE SELECTED TOTAL LINE.**

<div style="border:2px solid red;">

NOTE: Any adjustments to move negative amounts between projects (voided checks, for example) must be made through the Grants and Contracts SPD Center. PeopleSoft will not allow the movement of negative amounts between projects.

</div>
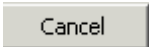
♦ Use the Tab key **(not Enter)** and the Apply button activates.

♦ Click on the Apply button.

♦ The redistributed total shows the total amount of the changes made and takes the information from the amount field and adds to the project distribution selections.

Note: If you made a change to an individual and saved the information, you may want to clear the panel (Clear), and refresh the screen **before making any additional changes to the same individual**.

♦ If the information is not correct and you wish to begin again with the same employee, click on the [Clear] button (bottom left hand corner of page).

♦ If the information entered is incorrect, has not been saved and you wish to view another person or account or if you wish to end the entire session, click on the [Return to Search] button (bottom of page). You will get this message:

Save Warning

You have unsaved data on this page. Click OK to go back and save, or Cancel to continue.
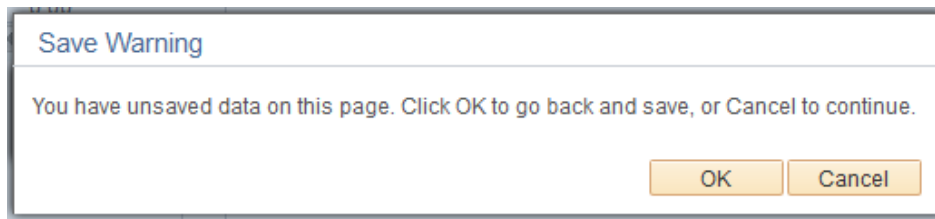
OK   Cancel

♦ Click [Cancel] button to continue and page will be cancelled and no changes will be committed.

♦ Past Pay Period Position Number changes will be effective immediately. New reports produced will reflect changes.

Return to Table of Contents

Summer Encumbrance Build

Navigation: Salary Planning Distribution/Use/Summer Encumbrance Build

The Summer Encumbrance Build is used for 9 Month Academic Employees (Pay Groups AMB, AMN, and RWA) to set up salary encumbrances over the summer months, May thru August.

Summer Encumbrance Build

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

Find an Existing Value

▼ Search Criteria

Search by: Empl ID ▼ begins with [   ]

☑ Include Hist

> Alternate Character Name
> **Empl ID**
> Empl Record
> Last Name
> Middle Name
> Name
> Second Last Name

[Search] Ad

♦ Select the employee record for a basic search (use the _Advanced Search_ selection criteria fields to narrow your search).

♦ Under Advance Search you can also narrow search with Empl Rcd Nbr, Last Name (Last,First), Name or Personnel Status in query page.

Summer Encumbrance Build

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

Find an Existing Value

▼ Search Criteria

Search by: Empl ID ▼ begins with [99999]

☐ Include History

[Search] Advanced Search

Search Results

View All   First ◄ 1 of 1 ► Last

Empl ID	Empl Record	Name	First Name	Last Name	Second Last Name	Alternate Character Name	Middle Name
99999	0	Jon Smith	Jon	Smith	(blank)	(blank)	T

⇒ Hit the Enter key or double click on the employee record line to select the record.

PeopleSoft displays the Summer Encumbrance Build panel.

PeopleSoft ALWAYS ENCUMBERS ACADEMIC (10 month) APPOINTMENTS.

The default encumbrance is indicated by the radio buttons adjacent to
Encumber ½ May and 0 June and 0 July and ½ August

**Note: If the effective date year is a prior fiscal year (especially 1999),
insert a new current dated record regardless if it is set the way you
want. That could be a false setting and there may not be an actual
record in the SPD Tables. You will also have to click on a different
radio button setting from what is displayed and click back to what you
want before clicking the Save button in order for the new record to be
save**

⇒ Click on the [+] button to the right of the page to insert a new row. The
Effective Date will default to the current date. **NEVER OVERTYPE THE
CURRENT SETTING ROW, ALWAYS INSERT A NEW ROW.**

⇒ To change the encumbrance from the Default settings for the selected
individual, click on the radio button adjacent to Encumber Full May and June

⇒ **and** click on the radio button adjacent to Encumber Full July and August.

If the Summer Faculty Position and account (511300) are to be used:

⇒ Click on the Box next to Use Summer Fac Position… under each encumbrance period.

Once desired settings are chosen, click on 🖫 Save button at bottom left of page**.

These settings will remain in effect until you change them back to the default encumbrance.

**Note: The summer school encumbrance change may not show up on the SPD reports until the Encumbrance Build Job runs over night.

Return to
Table of
Contents

Section 3: Inquiry Panels

Navigation: Salary Planning Distribution/Inquiry Pages

Future Pay Details

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

Find an Existing Value

▼ Search Criteria

Search by: [Empl ID ▾] begins with [ ]

[Search] Advanced Search

There are five Salary Planning and Distribution inquiry screens.

Future Pay Details (Current Year Only)
Future Pay Update History
Past Pay by Period/Date Range (Current Year Only)
Past Pay Update History
SPD Detail (Detail transactions lines in SPD Tables)

Each inquiry panel displays records according to your search selections

Future Pay Details

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

Find an Existing Value

▼ Search Criteria

Empl ID:	begins with ▾	
GL ORG value:	begins with ▾	🔍
Project/Grant:	begins with ▾	🔍
Fiscal Year:	= ▾	
Name:	begins with ▾	
Last Name:	begins with ▾	
Company:	begins with ▾	🔍
Business Unit:	begins with ▾	🔍

☐ Case Sensitive

[Search] [Clear] Basic Search 🔲 Save Search Criteria

- ◆ Enter PeopleSoft Employee ID Number for basic search. For Advanced search, additional parameters include: Business Unit, Company, Fiscal Year, GL ORG Value, Last Name, or Project/Grant.
- ◆ Hit Enter Key

Future Pay Details

Future Pay Update History

Past Pay Period by Date/Period

For this inquiry, please enter the accounting periods or pay period end dates you would like to inquire and then click on [Select] .

Past Pay Period Update History

SPD Detail

SPD Detail

Name:	Jon Smith		Empl ID:	99999	Empl Record:	0	Company: GT NID:

Selection Criteria:	FY 2016	Acct Pd 1	Pay Per End	Project	Account	Select

Find | View All   First ◀ 1 of 16 ▶ Last

Group:	RWM	Retired Working Monthly		Pay Period End Date:	07/31/2015
Dept:	160	Aerospace Engineering		Action Date:	09/03/2015
Job Code:	200S00	Regents Professor		Sequence Number:	2255
Position:	00007012	Misc Faculty	FY: 2016	Acct Pd:	1

Earn Amt:	-0.03	Fringe Amt:	0.00	Tuition Amt:	0.00

Project:	160131Q		FICA Status:	M
Account:	511200	Salaries-PT Fac w/o Benefits		
GL Status:	Y	Transaction Status: O Rev (Adj)		

🖫 Save   ◙ Return to Search   🖹 Notify

Return to Table of Contents

Section 4: Reports

Monthly Employee Cost Detail

Navigation: Salary Planning Distribution/Reports/Monthly Employee Cost Detail

Purpose: To provide the current salary distribution, by project for an individual employee. The report provides past pay period information and future (planned) salary distribution for an entire fiscal year. **You can also run Prior Year Reports.**

Recommended Frequency: Report can be run at any time by SPD on-line users. Distributed monthly by the SPD Center by special request.

Selection Criteria Options:

Report Request Parameters:
(i)   Report By: Select either GL Org (3 digit Financial Department Number) or Department (also the 3 digit Financial Department Number digit).

Population Selection: Leave at "All" unless you want a specific group for the GL Org or Department selected.

Print Order: Select either by Name; by Non-Student, etc; or by Job Title.

Fiscal Year: Enter fiscal year you desire. This is where you can run prior year reports
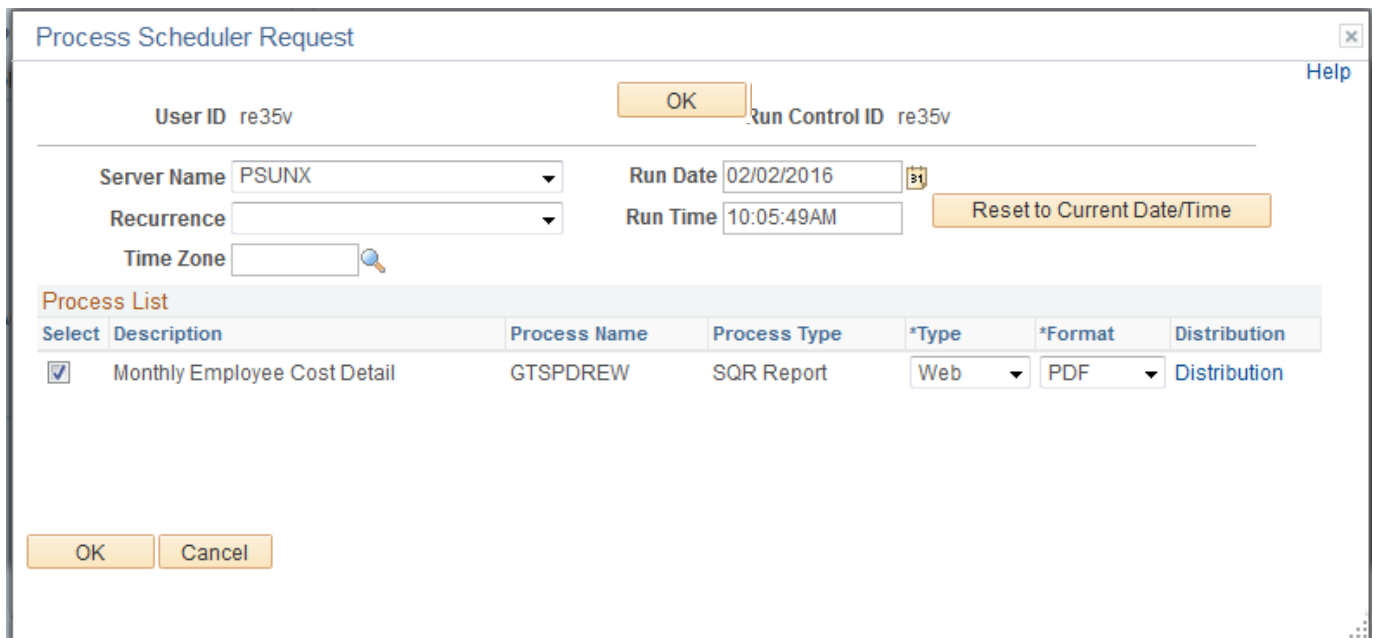
Company and Business Unit: Both should be GT.
ORG ID: When Report by GL Org is selected, then enter your 3 Digit Financial Department Number. **You will get all Employees paid on your Projects**

Dept ID: When Report by Department is selected, then enter same 3 Digit Financial Department Number. **You will get only Employees that belong to your Dept.**

When you have entered/selected the appropriate report parameters
⇒ Click on the Run ⬚Run⬚ button on upper right corner of page.

Process Scheduler Request ✕

Help

User ID re35v   ⬚OK⬚   Run Control ID re35v

Server Name PSUNX ▼   Run Date 02/02/2016 📅
Recurrence ▼   Run Time 10:05:49AM   ⬚ Reset to Current Date/Time ⬚
Time Zone   🔍

Process List

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
☑	Monthly Employee Cost Detail	GTSPDREW	SQR Report	Web ▼	PDF ▼	Distribution

⬚OK⬚ ⬚Cancel⬚

Click on ⬚OK⬚ to run report**.**

Monthly Employee Cost Detail Report (SPD):

Report ID: GTSPDREW

Georgia Institute of Technology
SALARY PLANNING AND DISTRIBUTION (SPD)
Monthly Employee Cost Detail
Fiscal Year 2015 (2014-07-01 through 2015-06-30)

Page No. 1
Run Date 02/02/2016
Run Time 10:09:51

Home Dept: 160 Aerospace Engineering
Org: 160 Aerospace Engineering

Title: <u>Regents Professor</u>   Name: <u>Smith,Jon</u>   Empl ID: <u>99999</u>   Monthly/Hourly Rate: <u>$11,285.11/Month</u>   FTE: <u>0.49</u>

Fund	10010 Cur Unrestricted - Stat			10010 Cur Unrestricted - Stat			10010 Cur Unrestricted - Stat			10010 Cur Unrestricted - Stat			
Project	160131L			160131M			160131Q			160131R			
Acct/Obj# GEAC_Ctr# Start/Stop Date	511200			511200			511200			511200			
HR_POS# Rcd# JC#	00007012 0 200800			00007012 0 200800			00007012 0 200800			00007012 0 200800			Total
Past Pay Period	Original Amt	Orig %	Adj $	Original Amt	Orig %	Adj $	Original Amt	Orig %	Adj $	Original Amt	Orig %	Adj $	
JUL 1 31-JUL-2014	0.00	0.000		0.00	0.000		0.00	0.000		0.00	0.000		
AUG 2 31-AUG-2014	0.00	0.000		0.00	0.000		0.00	0.000		0.00	0.000		
SEP 3 30-SEP-2014	0.00	0.000		0.00	0.000		0.00	0.000		0.00	0.000		
OCT 4 31-OCT-2014	0.00	0.000		0.00	0.000		0.00	0.000		0.00	0.000		
NOV 5 30-NOV-2014	0.00	0.000		0.00	0.000		0.00	0.000		0.00	0.000		
DEC 6 31-DEC-2014	0.00	0.000		0.00	0.000		0.00	0.000		0.00	0.000		
JAN 7 31-JAN-2015	2,314.29	20.507		2,314.29	20.507		2,314.29	20.507		4,342.24	38.478		
FEB 8 28-FEB-2015	2,314.28	20.507		2,314.28	20.507		2,314.28	20.507		4,342.27	38.478		
MAR 9 31-MAR-2015	2,314.28	20.507		2,314.28	20.507		2,314.28	20.507		4,342.27	38.478		
APR 10 30-APR-2015	288.84	2.559		288.81	2.559		288.84	2.559		2,889.75	25.607		
MAY 11 31-MAY-2015	0.00	0.000		0.00	0.000		0.00	0.000		1,672.02	14.816		
JUN 12 30-JUN-2015	0.00	0.000		0.00	0.000		0.00	0.000		0.00	0.000		
Total	7,231.69			7,231.66			7,231.69			17,588.55				

To
be
continued..

Monthly Project Detail - Past Period
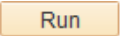
Navigation: Salary Planning Distribution/Reports/Monthly Prj Detail-Past Period

Purpose: To provide the total amount of Personal Services, Fringe Benefits & Tuition Remission by month and Fiscal Year for each individual employee on a selected project. This report reflects the personal services charges in the accounting periods of which the services were performed.

Recommended Frequency: Not distributed. Report can be run at any time by SPD on-line users.

Selection Criteria Options:

GL Org and matching Project ID are required. When you have entered/selected the appropriate report parameters

⇒ Click on the Run button   Run   in the upper right corner of page.

Monthly Prj Detail Past Period

Run Control ID re35v   Report Manager   Process Monitor   Run

Report Request Parameters

Company: GT 🔍 Business Unit: GT 🔍

Fiscal Year: 2016 🔍

GL ORG: 160 🔍   Aerospace Engineering

Project ID: 1601200 🔍   Instruction - AE
(Blank for ALL)

Enter BOTH GL ORG and Project ID

🖫 Save   🗗 Return to Search   🖃 Notify   🖺 Add   🗐 Update/Display

Monthly Project Detail Report – Past Period Applied:

```
                                           Georgia Institute of Technology
Report ID: GTGCSUM                         MONTHLY PROJECT COST DETAILS                              Page No.  1
                               Fiscal Year 2016 (2015-07-01 through 2016-06-30)                      Run Date 02/02/2016
                                        ORG TITLE: Aerospace Engineering                             Run Time 10:21:59
*** PAST PERIODS APPLIED RUN ***
PROJECT NUMBER :  1601200
PROJECT TITLE  :  Instruction - AE                                                                   PROJECT END DATE 06/30/2016
----------------------------------------------------------------------------------------------------------------------------
EMPLOYEE ID
EMPLOYEE NAME                          POS#/EMPL RCD#/BEN RATE  JOB TITLE
     Jul PS      Aug PS      Sep PS      Oct PS      Nov PS      Dec PS      Jan PS      Feb PS      Mar PS      Apr PS      May PS      Jun PS       TOTAL PS
             FB          FB          FB          FB          FB          FB          FB          FB          FB          FB          FB          FB       TOTAL FB
             TR          TR          TR          TR          TR          TR          TR          TR          TR          TR          TR          TR       TOTAL TR
----------------------------------------------------------------------------------------------------------------------------


568584
XXXXXXXXXXXXXXXXX                      187 /  0  / 0.030      Graduate Teaching Assistant
     0.00    1,134.92    2,166.67    2,166.67    2,166.67    2,166.67        0.00        0.00        0.00        0.00        0.00        0.00       9,801.60
     0.00       34.05       65.00       65.00       65.00       65.00        0.00        0.00        0.00        0.00        0.00        0.00         294.05
     0.00        0.00        0.00        0.00        0.00        0.00        0.00        0.00        0.00        0.00        0.00        0.00           0.00


87537
XXXXXXXXXXXXXXXXX                      10820 /  0  / 0.300      Regents Professor
  4,676.88    1,169.22      467.69      935.38      935.38      935.38    4,676.88    4,676.88    4,676.88    4,676.88    4,676.88    4,676.88      37,181.21
  1,403.07      350.77      140.31      280.61      280.61      280.62    1,403.06    1,403.06    1,403.06    1,403.06    1,403.06    1,403.06      11,154.35
     0.00        0.00        0.00        0.00        0.00        0.00        0.00        0.00        0.00        0.00        0.00        0.00           0.00


562708
XXXXXXXXXXXXXXXXX ==                   187 /  0  / 0.030      Graduate Teaching Assistant
     0.00      785.71    1,500.00    1,500.00    1,500.00      260.87        0.00        0.00        0.00        0.00        0.00        0.00       5,546.58
     0.00       23.57       45.00       45.00       45.00        7.83        0.00        0.00        0.00        0.00        0.00        0.00         166.40
     0.00        0.00        0.00        0.00        0.00        0.00        0.00        0.00        0.00        0.00        0.00        0.00           0.00


569208
XXXXXXXXXXXXXXXXX                      187 /  0  / 0.030      Graduate Teaching Assistant
     0.00        0.00    3,301.59    2,166.67    2,166.67    2,166.67    2,166.67    2,166.67    2,166.67    2,166.67        0.00        0.00      18,468.28
     0.00        0.00       99.05       65.00       65.00       65.00       65.00       65.00       65.00       65.00        0.00        0.00         554.05
     0.00        0.00        0.00        0.00        0.00        0.00        0.00        0.00        0.00        0.00        0.00        0.00           0.00


554150
XXXXXXXXXXXXXXXXXXXXXX                  187 /  0  / 0.030      Graduate Research Assistant
     0.00    1,134.87    2,166.67        0.00        0.00        0.00        0.00        0.00        0.00        0.00        0.00        0.00       3,301.54
     0.00       34.05       65.00        0.00        0.00        0.00        0.00        0.00        0.00        0.00        0.00        0.00          99.05
     0.00        0.00        0.00        0.00        0.00        0.00        0.00        0.00        0.00        0.00        0.00        0.00           0.00
```

Monthly Project Detail GL - Posting

Navigation: Salary Planning Distribution/Reports/ Monthly Prj Detail-GL Posting

Purpose: To provide the total amount of Personal Services, Fringe Benefits and Tuition Remission by month and Fiscal Year for each individual employee on a selected project. This report reflects the personal services charges in the accounting periods to which they are posted to the General Ledger.

Recommended Frequency: Report can be run/printed at any time by SPD on-line users.

Selection Criteria Options:

GL Org and matching Project ID are required. When you have entered/selected the appropriate report parameters

⇒ Click on the Run button [Run] in the upper right corner of page.

Monthly Prj Detail-GL Posting

Run Control ID re35v   Report Manager   Process Monitor   [Run]

Report Request Parameters

Company: GT 🔍 Business Unit: GT 🔍
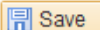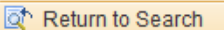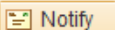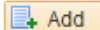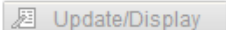
Fiscal Year: 2016 🔍

GL ORG: 160 🔍 Aerospace Engineering

Project ID: 1601200 🔍 Instruction - AE

(Blank for ALL)

Enter BOTH GL Org and Project ID

[💾 Save] [↩ Return to Search] [✉ Notify]   [➕ Add] [🗐 Update/Display]

Monthly Project Detail Report – GL Posting:

```
                                      Georgia Institute of Technology
Report ID:  GTGCSUM1                  MONTHLY PROJECT COST DETAILS(GL)                          Page No.  1
                              Fiscal Year 2016 (2015-07-01 through 2016-06-30)                  Run Date 02/02/2016
                                      ORG TITLE: Aerospace Engineering                          Run Time 10:36:04
*** GL POSTING APPLIED RUN ***
PROJECT NUMBER :  1601200
PROJECT TITLE  :  Instruction - AE                                                       PROJECT END DATE 06/30/2016
-------------------------------------------------------------------------------------------------------------------
EMPLOYEE ID
EMPLOYEE NAME                  POS#/EMPL RCD#/BEN RATE  JOB TITLE
   Jul PS      Aug PS    Sep PS    Oct PS    Nov PS    Dec PS    Jan PS    Feb PS    Mar PS    Apr PS    May PS    Jun PS      TOTAL PS
       FB          FB        FB        FB        FB        FB        FB        FB        FB        FB        FB        FB      TOTAL FB
       TR          TR        TR        TR        TR        TR        TR        TR        TR        TR        TR        TR      TOTAL TR
-------------------------------------------------------------------------------------------------------------------


568584
xxxxxxxxxxxxxxxxxxxx           187 /  0  / 0.030      Graduate Teaching Assistant
    0.00    1,134.92  2,166.67  2,166.67  2,166.67  2,166.67      0.00      0.00      0.00      0.00      0.00      0.00    9,801.60
    0.00       34.05     65.00     65.00     65.00     65.00      0.00      0.00      0.00      0.00      0.00      0.00      294.05
    0.00        0.00      0.00      0.00      0.00      0.00      0.00      0.00      0.00      0.00      0.00      0.00        0.00


87537
xxxxxxxxxxxxxxxxxxxx          10820 /  0  / 0.300      Regents Professor
 4,676.88       0.00  3,507.66   -935.37    935.38    935.38  4,676.88  4,676.88  4,676.88  4,676.88  4,676.88  4,676.88   37,181.21
 1,403.07       0.00  1,052.30   -280.61    280.61    280.62  1,403.06  1,403.06  1,403.06  1,403.06  1,403.06  1,403.06   11,154.35
     0.00       0.00      0.00      0.00      0.00      0.00      0.00      0.00      0.00      0.00      0.00      0.00        0.00


562708
xxxxxxxxxxxxxxxxxxxx           187 /  0  / 0.030      Graduate Teaching Assistant
    0.00     785.71      0.00  3,000.00  1,500.00    260.87      0.00      0.00      0.00      0.00      0.00      0.00    5,546.58
    0.00      23.57      0.00     90.00     45.00      7.83      0.00      0.00      0.00      0.00      0.00      0.00      166.40
    0.00       0.00      0.00      0.00      0.00      0.00      0.00      0.00      0.00      0.00      0.00      0.00        0.00


569208
xxxxxxxxxxxxxxxxxxxx           187 /  0  / 0.030      Graduate Teaching Assistant
    0.00       0.00  3,301.59  2,166.67  2,166.67  2,166.67  2,166.67  2,166.67  2,166.67  2,166.67      0.00      0.00   18,468.28
    0.00       0.00     99.05     65.00     65.00     65.00     65.00     65.00     65.00     65.00      0.00      0.00      554.05
    0.00       0.00      0.00      0.00      0.00      0.00      0.00      0.00      0.00      0.00      0.00      0.00        0.00


554150
xxxxxxxxxxxxxxxxxxxx           187 /  0  / 0.030      Graduate Research Assistant
    0.00       0.00      0.00      0.00  3,301.54      0.00      0.00      0.00      0.00      0.00      0.00      0.00    3,301.54
    0.00       0.00      0.00      0.00     99.05      0.00      0.00      0.00      0.00      0.00      0.00      0.00       99.05
    0.00       0.00      0.00      0.00      0.00      0.00      0.00      0.00      0.00      0.00      0.00      0.00        0.00
```
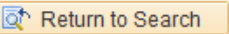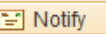
Undesignated Sponsored Summary

Navigation: Salary Planning Distribution/Reports/ Undesignated Sponsor Summary

Purpose: To provide the total amount of salaries, by department, that are currently charged to Undesignated Sponsored projects.
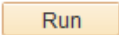
Recommended Frequency: Distributed monthly by the SPD Center. Report can be run at any time by SPD on-line users. (**However aging will be off if not run at end of month**).

Selection Criteria Options:

> When you have entered/selected the appropriate report parameters
>
> ⇒ Click on the Run button | Run | in the upper right corner of page.

Undesignated Sponsored Summary

Run Control ID re35v   Report Manager   Process Monitor | Run |
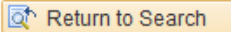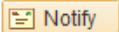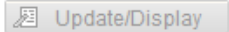
Report Request Parameters

Company: GT 🔍   Business Unit: GT 🔍

Fiscal Year: 2016 🔍

GL ORG: 160   🔍   Aerospace Engineering
(Blank for ALL)

🔲 Save   🔍 Return to Search   🖹 Notify   🔲 Add   🔲 Update/Display

Undesignated Sponsored Summary:

```
                                                Georgia Institute of Technology
Report ID:  GTGC143                     UNDESIGNATED SPONSORED JUSTIFICATION SUMMARY REPORT                    Page No.  1
                                                      AS OF 02/02/2016                                        Run Date 02/02/2016
                                                                                                             Run Time 10:44:31
ORG ID :   160 - Aerospace Engineering / For Fiscal Year : 2016

DEPT    DEPT                     TOTAL         TOTAL      ***********************************  E X P E N D I T U R E S  ***************************************
ID      NAME                  ENCUMBRANCES   EXPENDITURES     UNDER        30 - 60       60 DAYS        60 - 90       90 - 120      OVER 120
                                                            30 DAYS        DAYS          AND OVER       DAYS          DAYS          DAYS
--------------------------------------------------------------------------------------------------------------------------------------------------------
160     Aerospace Engineering   1,051,111.46    44,013.97       0.00          0.00       44,013.97      18,361.93     11,552.07     14,099.97
210     Electrical & Computer Engr  32,499.98        0.00       0.00          0.00           0.00           0.00          0.00          0.00
--------------------------------------------------------------------------------------------------------------------------------------------------------
TOTALS :                        1,083,611.44    44,013.97       0.00          0.00       44,013.97      18,361.93     11,552.07     14,099.97
--------------------------------------------------------------------------------------------------------------------------------------------------------
```

Undesignated Sponsored Detail

Navigation: Salary Planning Distribution/Reporst/ Undesignated Sponsor Detail

Purpose: To provide details to the department for all employees who have personal services that are currently charged to an Undesignated Sponsored project. Charges appearing on this report that are greater than 60 days should be redistributed/reassigned to another project.

Recommended Frequency: Distributed monthly by the SPD Center. Report can be run at any time by SPD on-line users (**however aging will be off if not run at end of month**).

Selection Criteria Options:

When you have entered/selected the appropriate report parameters
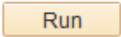
⇒ Click on the Run button ⎢ Run ⎥ in the upper right corner of page.

Undesignated Sponsored Detail

Run Control ID re35v   Report Manager   Process Monitor   ⎢ Run ⎥

Process Instance:2451251

Report Request Parameters
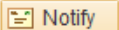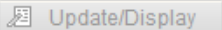
Company: GT 🔍   Business Unit: GT 🔍

Fiscal Year: 2016 🔍

GL ORG: 160 🔍   Aerospace Engineering
(Blank for ALL)

💾 Save   🔍 Return to Search   ✉ Notify   ➕ Add   🗔 Update/Display

Undesignated Sponsored Detail:

```
                                              Georgia Institute of Technology
Report ID:  GTGC142                       UNDESIGNATED SPONSORED JUSTIFICATION DETAIL REPORT                      Page No.  1
                                                       AS OF 02/02/2016                                          Run Date 02/02/2016
ORG ID        :  160 - Aerospace Engineering                                                                     Run Time 10:44:55
DEPARTMENT    :  160 - Aerospace Engineering
ADMINISTRATOR :  Yang,Vigor
```

EMPLOYEE NAME	EMPL ID/RCD#	CLASS	PAYGRP	PROJECT	ENCUMBRANCE	UNDER 30 DAYS	30 - 60 DAYS	60 DAYS AND OVER	60 - 90 DAYS	90 - 120 DAYS	OVER 120 DAYS
xxxxxxxxxxxxxxxxxxxxxxxxx	532326 / 0	P	FMB	1606680	43,918.98	0.00	0.00	0.00	0.00	0.00	0.00
xxxxxxxxxxxxxxxxxxxxxxxxx	532525 / 0	P	FMB	1606680	33,261.36	0.00	0.00	0.00	0.00	0.00	0.00
xxxxxxxxxxxxxxxxxxxxxxxxx	563701 / 0	Q	AMG	1606680	6,500.02	0.00	0.00	0.00	0.00	0.00	0.00
xxxxxxxxxxxxxxxxxxxxxxxxx	515647 / 0	P	FMB	1606680	41,811.48	0.00	0.00	2,000.00	0.00	0.00	2,000.00
xxxxxxxxxxxxxxxxxxxxxxxxx	569525 / 0	Q	AMG	1606680	4,333.35	0.00	0.00	0.00	0.00	0.00	0.00
xxxxxxxxxxxxxxxxxxxxxxxxx	548632 / 0	Q	AMG	1606680	5,333.35	0.00	0.00	0.00	0.00	0.00	0.00
xxxxxxxxxxxxxxxxxxxxxxxxx	563180 / 0	Q	AMG	1606680	9,600.00	0.00	0.00	0.00	0.00	0.00	0.00
xxxxxxxxxxxxxxxxxxxxxxxxx	548387 / 0	Q	AMG	1606680	0.00	0.00	0.00	978.26	978.26	0.00	0.00
xxxxxxxxxxxxxxxxxxxxxxxxx	541252 / 0	Q	AMG	1606680	3,600.00	0.00	0.00	600.00	600.00	0.00	0.00
xxxxxxxxxxxxxxxxxxxxxxxxx	542730 / 0	Q	AMG	1606680	12,999.96	0.00	0.00	0.00	0.00	0.00	0.00
xxxxxxxxxxxxxxxxxxxxxxxxx	548660 / 0	Q	AMG	1606680	30,999.96	0.00	0.00	10,333.32	5,166.66	5,166.66	0.00
xxxxxxxxxxxxxxxxxxxxxxxxx	557315 / 0	Q	AMG	1606680	13,599.96	0.00	0.00	0.00	0.00	0.00	0.00
xxxxxxxxxxxxxxxxxxxxxxxxx	558723 / 0	Q	AMG	1606680	12,999.96	0.00	0.00	0.00	0.00	0.00	0.00
xxxxxxxxxxxxxxxxxxxxxxxxx	540244 / 0	P	FMB	1606680	43,918.98	0.00	0.00	0.00	0.00	0.00	0.00
xxxxxxxxxxxxxxxxxxxxxxxxx	548652 / 0	Q	AMG	1606680	4,333.32	0.00	0.00	0.00	0.00	0.00	0.00
xxxxxxxxxxxxxxxxxxxxxxxxx	569735 / 0	P	FMB	1606680	30,000.00	0.00	0.00	0.00	0.00	0.00	0.00
xxxxxxxxxxxxxxxxxxxxxxxxx	565769 / 0	Q	AMG	1606680	13,000.03	0.00	0.00	0.00	0.00	0.00	0.00
xxxxxxxxxxxxxxxxxxxxxxxxx	554323 / 0	Q	AMG	1606680	12,999.96	0.00	0.00	0.00	0.00	0.00	0.00
xxxxxxxxxxxxxxxxxxxxxxxxx	543219 / 0	P	FMB	1606680	30,000.00	0.00	0.00	0.00	0.00	0.00	0.00
xxxxxxxxxxxxxxxxxxxxxxxxx	567528 / 0	P	FMB	1606680	30,000.00	0.00	0.00	0.00	0.00	0.00	0.00
xxxxxxxxxxxxxxxxxxxxxxxxx	558144 / 0	Q	AMG	1606680	12,999.96	0.00	0.00	0.00	0.00	0.00	0.00
xxxxxxxxxxxxxxxxxxxxxxxxx	565546 / 0	Q	AMG	1606680	13,000.03	0.00	0.00	0.00	0.00	0.00	0.00
xxxxxxxxxxxxxxxxxxxxxxxxx	553447 / 0	Q	AMG	1606680	13,002.03	0.00	0.00	0.00	0.00	0.00	0.00
xxxxxxxxxxxxxxxxxxxxxxxxx	553908 / 0	Q	AMG	1606680	12,999.96	0.00	0.00	0.00	0.00	0.00	0.00
xxxxxxxxxxxxxxxxxxxxxxxxx	544231 / 0	Q	AMG	1606680	0.00	0.00	0.00	1,278.26	1,278.26	0.00	0.00
xxxxxxxxxxxxxxxxxxxxxxxxx	529991 / 0	Q	AMG	1606680	18,000.00	0.00	0.00	0.00	0.00	0.00	0.00
xxxxxxxxxxxxxxxxxxxxxxxxx	546287 / 0	Q	AMG	1606680	12,999.96	0.00	0.00	2,166.66	0.00	0.00	2,166.66
xxxxxxxxxxxxxxxxxxxxxxxxx	559824 / 0	P	FMB	1606680	20,666.68	0.00	0.00	0.00	0.00	0.00	0.00
xxxxxxxxxxxxxxxxxxxxxxxxx	569813 / 0	Q	AMG	1606680	13,000.03	0.00	0.00	0.00	0.00	0.00	0.00
xxxxxxxxxxxxxxxxxxxxxxxxx	555541 / 0	Q	AMG	1606680	0.00	0.00	0.00	130.43	130.43	0.00	0.00
xxxxxxxxxxxxxxxxxxxxxxxxx	554106 / 0	Q	AMG	1606680	13,999.99	0.00	0.00	0.00	0.00	0.00	0.00
xxxxxxxxxxxxxxxxxxxxxxxxx	569728 / 0	Q	AMG	1606680	0.00	0.00	0.00	1,134.92	0.00	0.00	1,134.92
xxxxxxxxxxxxxxxxxxxxxxxxx	414976 / 0	P	FMB	1606680	57,390.48	0.00	0.00	0.00	0.00	0.00	0.00
xxxxxxxxxxxxxxxxxxxxxxxxx	546663 / 0	Q	AMG	1606680	12,999.96	0.00	0.00	0.00	0.00	0.00	0.00
xxxxxxxxxxxxxxxxxxxxxxxxx	538006 / 0	Q	AMG	1606680	14,499.96	0.00	0.00	2,416.66	2,416.66	0.00	0.00
xxxxxxxxxxxxxxxxxxxxxxxxx	563198 / 0	Q	AMG	1606680	0.00	0.00	0.00	100.00-	0.00	0.00	100.00-
xxxxxxxxxxxxxxxxxxxxxxxxx	566447 / 0	P	FMB	1606680	30,000.00	0.00	0.00	0.00	0.00	0.00	0.00
xxxxxxxxxxxxxxxxxxxxxxxxx	519641 / 0	P	FMB	1606680	34,999.98	0.00	0.00	0.00	0.00	0.00	0.00
xxxxxxxxxxxxxxxxxxxxxxxxx	82643 / 0	D	FMB	1606680	31,975.98	0.00	0.00	0.00	0.00	0.00	0.00
xxxxxxxxxxxxxxxxxxxxxxxxx	540411 / 0	P	FMB	1606680	0.00	0.00	0.00	2,698.41	0.00	0.00	2,698.41
xxxxxxxxxxxxxxxxxxxxxxxxx	510495 / 0	Q	AMG	1606680	12,999.96	0.00	0.00	8,666.64	2,166.66	2,166.66	4,333.32

Monthly Salary Distribution Change Summary

Navigation: Salary Planning Distribution/Reporst/ Salary Distribution Change Sum

Purpose: To provide the total amount of salary changes for each project

Recommended Frequency: Monthly, but can be run at any time by SPD on-line users.

Selection Criteria Options:

> When you have entered/selected the appropriate report parameters

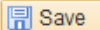> ⇒ Click on the Run button [Run] in the upper right corner of page.

Monthly Salary Dist Change Sum

Run Control ID re35v   Report Manager   Process Monitor   [Run]

Process Instance:2451252
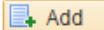
Report Request Parameters
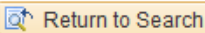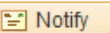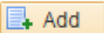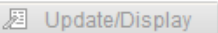
Company: GT 🔍   Business Unit: GT 🔍

ORG ID: 160 🔍   Aerospace Engineering
(Blank for ALL)
Fiscal Year: 2016 🔍

From Accounting Period: 1 🔍

To Accounting Period: 3 🔍

[💾 Save]   [🔍 Return to Search]   [📧 Notify]   [➕ Add]   [Update/Display]

Monthly Salary Distribution Change Summary:

```
                                    Georgia Institute of Technology
         Report ID:  GTGCR138.SQR         SALARY PLANNING AND DISTRIBUTION SYSTEM REPORT        Page No.  3
                                       Monthly Salary Distribution Changes Summary              Run Date 02/02/2016
                                         From July to September Fiscal Year 2016                Run Time 11:04:48

              ORG : 160  Aerospace Engineering
       Department : 160  Aerospace Engineering


                  PeopleSoft          Account
                  Project#            (Object)        Beginning Balance      Change Amt      Ending Balance
                  ------------------------------------------------------------------------------------------------

        GIT       1601150             511100                 54,000.00       (44,181.82)          9,818.18

        GIT       1601150             511300                 30,589.65             0.00          30,589.65

        GIT       1601150             511430                227,582.87      (146,187.64)         81,395.23

        GIT       1601200             511100              2,300,972.99      (474,407.14)      1,826,565.85

        GIT       1601200             511200                      0.00        18,941.78          18,941.78

        GIT       1601200             511300                 37,694.75        (5,290.35)         32,404.40

        GIT       1601200             511410                  1,000.00             0.00           1,000.00

        GIT       1601200             511430                 28,200.00       344,901.06         373,101.06

        GIT       1601236             511100                      0.00        20,125.42          20,125.42

        GIT       1601236             511300                 30,122.66        (3,475.78)         26,646.88

        GIT       1601236             511430                 50,200.00       (45,100.00)          5,100.00

        GIT       1601289             511300                     65.00             0.00              65.00

        GIT       1601289             511410                  2,700.00             0.00           2,700.00

        GIT       1601289             511430                 26,640.00       (25,355.71)          1,284.29

        GIT       1601290             511100                343,925.67       (96,430.47)        247,495.20

        GIT       1601290             511500                398,138.13       (18,675.75)        379,462.38

        GIT       1601290             511620                206,929.18         4,847.61         211,776.79

        GIT       1601290             723000                      0.00            62.25              62.25

        GIT       1601300             511100              1,823,738.12       590,099.98       2,413,838.10

        GIT       1601300             511200                      0.00           189.49             189.49

        GIT       1601300             511300                 12,453.77             0.00          12,453.77

        GIT       1601300             511400                  1,320.00         1,542.04           2,862.04

        GIT       1601300             511430                 83,880.72         1,096.07          84,976.79
```

Monthly Salary Distribution Change Detail

Navigation: Salary Planning Distribution/Reports/ Salary Distribution Change Dtl

Purpose: To provide a complete description of all salary distribution changes processed during the current reporting period (month) for an operating unit.
This report provides departments a record of the changes processed each month.

Recommended Frequency: Monthly, but can be run at any time by SPD on-line users.

Selection Criteria Options:

When you have entered/selected the appropriate report parameters

⇒ Click on the Run button [Run] in the upper right corner of page.

Monthly Salary Dist Change Dtl

Run Control ID re35v	Report Manager Process Monitor	Run
	Process Instance:2451253	

Report Request Parameters

Company: GT 🔍 Business Unit: GT 🔍

ORG ID: 160 🔍   Aerospace Engineering
(Blank for ALL)
Fiscal Year: 2016 🔍

From Accounting Period: 1 🔍

To Accounting Period: 3 🔍

🖫 Save   🔍 Return to Search   ☰ Notify   🗐 Add   📄 Update/Display

Monthly Salary Distribution Change Detail:

```
Report ID: GTGCR137.SQR                    Georgia Institute of Technology              Page No.  3
                                   SALARY PLANNING AND DISTRIBUTION SYSTEM REPORT      Run Date 02/02/2016
                                        Monthly Salary Distribution Changes            Run Time 11:09:53
      Org : 160  Aerospace Engineering     From July to September Fiscal Year 2016
Department : 160  Aerospace Engineering


PeopleSoft                      Empl ID  / RCD#   PeopleSoft    Account
Position#    Employee Name                        Project#      (Object)      Beginning Balance   Change Amt   Ending Balance
--------------------------------------------------------------------------------------------------------------------------

00014334   xxxxxyxxXxxkxbxxOxxxxxxxx  532326  / 0   1606680       511100            58,558.64          0.00        58,558.64
                                        - -        1606A55       511100            18,159.55        (28.50)       18,131.05
                                                   1606ATE       511100            11,119.77         28.50        11,148.27
00014334   xxxxxyxxXxxkxbxxOxxxxxxxx  532326  / 0   1606680       511100            58,558.64          0.00        58,558.64
                                        - -        1606A55       511100            18,159.55        (28.50)       18,131.05
                                                   1606ATE       511100            11,119.77         28.50        11,148.27
                                                                              ----------------------------------------------
                                                                                 175,675.92          0.00       175,675.92
                                                                              ----------------------------------------------


00000192   xxxxxyxxXxxkxbxxOxxxxxxxx:er  569097 / 0  1605B03      512100                 0.00        120.00           120.00
                                        - -                                    ----------------------------------------------
                                                                                       0.00        120.00           120.00
                                                                              ----------------------------------------------


00000187   xxxxxyxxXxxkxbxxOx         542369  / 0   1606680       511430            16,198.38          0.00        16,198.38
                                        - -        1606AWH       511430             9,801.54          0.00         9,801.54
00000187   xxxxxyxxXxxkxbxxOx         542369  / 0   1606680       511430            16,198.38          0.00        16,198.38
                                        - -        1606AWH       511430             9,801.54          0.00         9,801.54
                                                                              ----------------------------------------------
                                                                                  51,999.84          0.00        51,999.84
                                                                              ----------------------------------------------


00000195   xxxxxyxxXxxkxb            546616  / 0   1606680       511430            13,000.03     (13,000.03)            0.00
                                                   1606BDF       511430             2,500.00          0.00         2,500.00
                                                   1606BEK       511200                 0.00      10,063.64        10,063.64
                                                   1606BEK       511430            11,000.02      (8,674.62)        2,325.40
                                                                              ----------------------------------------------
                                                                                  26,500.05     (11,611.01)       14,889.04
                                                                              ----------------------------------------------


00010820   xxxxxyxxXxxkx             87537   / 0   1601200       511100            32,738.16      10,522.98        43,261.14
                                        - -        1601300       511100            33,692.21      (1,860.53)       31,831.68
                                                   1601400       511100            20,204.16      (4,209.19)       15,994.97
                                                                              ----------------------------------------------
                                                                                  86,634.53       4,453.26        91,087.79
                                                                              ----------------------------------------------


00000195   xxxxxyxxXxx              558280  / 0   1606680       511100            46,199.97     (15,399.99)       30,799.98
                                        - -        1606AQV       511100             5,133.33       7,506.87        12,640.20
                                                   1606AXE       511100                 0.00       3,849.99         3,849.99
```

Salary Distribution Change Summary
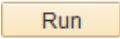
Navigation: Salary Planning Distribution/Reports/ Salary Distribution Change Sum

Purpose: To provide the summary total amount of salary changes for each project

Recommended Frequency: Monthly, but can be run at any time by SPD on-line users.

Selection Criteria Options:

When you have entered/selected the appropriate report parameters

⇒ Click on the Run button [Run] in the upper right corner of page.

Salary Distribution Change Sum

Run Control ID re35v   Report Manager   Process Monitor   [Run]

Process Instance:2451254

Report Request Parameters

Company: GT 🔍   Business Unit: GT 🔍
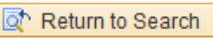
Fiscal Year: 2016 🔍
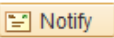
Start Date: 09/01/2015 📅
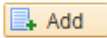
GL ORG: 160 🔍   Aerospace Engineering
(Blank for ALL)

[💾 Save] [🔍 Return to Search] [📧 Notify]   [➕ Add] [📄 Update/Display]

Salary Distribution Change Summary Report:

```
     ORG ID :  160
DEPARTMENT :  160  Aerospace Engineering
------------------------------------------------------------------------------------------------
                                     CHANGES PROCESSED
               PROJECT                    AMOUNT
------------------------------------------------------------------------------------------------
GIT     1601150                        (23,201.34)

GIT     1601200                        (66,357.81)

GIT     1601236                         20,125.42

GIT     1601289                         (1,403.00)

GIT     1601290                        (29,331.26)

GIT     1601300                       (143,373.59)

GIT     16013013                         6,684.33

GIT     16013014                        27,910.89

GIT     16013015                        66,927.65

GIT     16013035                       (17,870.66)

GIT     16013052                         3,301.59

GIT     160130Y                          8,855.84

GIT     160131A                        (10,064.33)

GIT     160131B                        (14,133.66)

GIT     160131H                          2,428.04

GIT     160131L                           (448.45)

GIT     160131M                          1,560.32

GIT     160131Q                           (736.41)

GIT     160131X                          2,852.53

GIT     1601353                         11,786.72

GIT     16013X7                        144,781.80
```

Salary Distribution Change Detail

Navigation: Salary Planning Distribution/Reports/ Salary Distribution Change Dtl

Purpose: To provide a complete description of all salary distribution changes processed during the current reporting period (month) for an operating unit.
This report provides departments a record of the changes processed each month.

Recommended Frequency: Monthly, but can be run at any time by SPD on-line users.

Selection Criteria Options:

When you have entered/selected the appropriate report parameters

⇒ Click on the Run button   Run   in the upper right corner of page.

Salary Distribution Change Detail Report:

```
                                           Georgia Institute of Technology
Report ID: GTGC150                            SALARY DISTRIBUTION CHANGES                        Page No.  4
                                      Fiscal Year 2016 (2015-07-01 through 2016-06-30)           Run Date 02/02/2016
                                                                                                 Run Time 12:35:10

DEPARTMENT :  160  Aerospace Engineering
--------------------------------------------------------------------------------------------------------------------
PSOFT      EMPL       EMPL              PROJECT     ACTION            CHANGE          CHANGED          FUTURE    ACCOUNTING
POS.#       ID        NAME                          DATE             AMOUNT          BY                 %        PERIOD
--------------------------------------------------------------------------------------------------------------------
187      563198 / 0   Ng,Kenneth Yu Wai 1601150    09/04/2015        1,166.66        Carter,Anita M   100.000   JUL
                                        1601150     09/04/2015          625.01        Carter,Anita M   100.000   JUL
                                        1601150     09/04/2015          359.79        Carter,Anita M   100.000   JUL
                                        1601150     09/04/2015        1,000.00        Carter,Anita M   100.000   JUL
                                                                    ---------------
Employee Total:                                                        3,151.46
                                                                    ---------------
187      548660 / 0   Coder,Ryan Daniel 1601150    09/16/2015       (2,706.35)       Carter,Anita M   100.000   AUG
                                                                    ---------------
Employee Total:                                                      (2,706.35)
                                                                    ---------------
187      558246 / 0   Salahshoor Pirsoltan,Hossein 1601150  09/25/2015  (1,500.00)   Carter,Anita M   100.000   JUL
                                                                    ---------------
Employee Total:                                                      (1,500.00)
                                                                    ---------------
187      568532 / 0   Choi,Thomas       1601150    09/28/2015       (1,134.92)       Carter,Anita M   100.000   AUG
                                        1601150     09/28/2015       (2,166.67)       Carter,Anita M   100.000   AUG
                                                                    ---------------
Employee Total:                                                      (3,301.59)
                                                                    ---------------
187      567475 / 0   Stevenson,Terry Hurley 1601150 09/28/2015        (667.00)      Carter,Anita M    63.741   AUG
                                        1601150     09/28/2015       (1,381.27)       Carter,Anita M    63.741   AUG
                                        1601150     09/28/2015       (2,167.00)       Carter,Anita M    63.741   AUG
                                                                    ---------------
Employee Total:                                                      (4,215.27)
                                                                    ---------------
187      554150 / 0   Bakshi,Kaivalya Sanjeev 1601150 11/05/2015     (1,134.87)      Carter,Anita M   100.000   SEP
                                        1601150     11/05/2015       (2,166.67)       Carter,Anita M   100.000   SEP
                                        1601150     11/05/2015       (1,161.37)       Carter,Anita M   100.000   SEP
                                                                    ---------------
Employee Total:                                                      (4,462.91)
                                                                    ---------------
187      563744 / 0   Williams,Grady Robert 1601150 11/13/2015        (536.17)       Barnes II,Terryl 100.000   JUL
                                        1601150     11/13/2015         (536.17)       Barnes II,Terryl 100.000   JUL
                                        1601150     11/13/2015          536.17        Barnes II,Terryl 100.000   JUL
                                        1601150     11/13/2015          495.58        Barnes II,Terryl 100.000   JUL
                                        1601150     11/13/2015         (495.58)       Barnes II,Terryl 100.000   JUL
                                                                    ---------------
Employee Total:                                                        (536.17)
                                                                    ---------------
187      568532 / 0   Choi,Thomas       1601150    12/02/2015       (2,166.67)       Carter,Anita M   100.000   AUG
                                        1601150     12/02/2015       (2,166.67)       Carter,Anita M   100.000   AUG
                                        1601150     12/02/2015       (1,134.92)       Carter,Anita M   100.000   AUG
```

Workload Assignment

Workload Assignment Form:

The Workload Assignment Form is emailed to each employee required to maintain OMB Uniform Requirements Compliance. The email contains a web link and instructions. The employee clicks on the web link, enters his/her GT Account and password to access the report.

The email distribution features a "Submit Changes" action button that opens up email for the employee to send to the appropriate department accountant requesting changes/corrections.

The employee is responsible for reviewing and maintaining the monthly copies along with any other appropriate materials and policies required for A21 Compliance.

The Department can also run the Workload Assignment Form as well from SPD as a backup if the employee looses the report or needs at a later date.

Printed Workload Assignment Report

Georgia Institute Of Technology
Transmittal of Updated Workload Assignment to Employee

Home Dept: 160 – Aerospace Engineering	Work Dept: 160 – Aerospace Engineering	Fiscal Year: 2016
Name: Smith,Jon	Empl. ID: 99999	Title: Regents Professor	Month: July

INSTRUCTIONS

This Workload Assignment Report has been provided for review, confirmation, and/or correction in accordance to Plan Confirmation System requirements.

1. REVIEW the distribution of your salary to projects to determine if it accurately reflects your current and planned activities

2. ERRORS.   Contact your departmental Financial Manager if:
   a. This workload distribution is not correct (deviates 5% or more from your actual effort).
   b. You are not familiar with one or more of the projects being charged for your effort.

3. NO ERRORS. Retain a printed or electronic copy of this Workload Assignment Report and any modifications.

4. QUESTIONS. Contact Robert Ellington (894-3488), Grants and Contracts Accounting, if you need information about your responsibilities under the Georgia Tech Plan
         Confirmation System.

Project	Sponsor	Project Title	Project Dates Start Date	End Date
160131Q	PRATT & WHITNEY AIRCRAFT/	AUTOIGNITION OF FUEL SPRAYS	01-JAN-2015	31-DEC-2015
1606680	UNDESIGNATED	AERO UNDESIGNATED SPONSORED RESEARCH	01-JUL-1998	30-JUN-2020
1606BEC	GE POWER & WATER/SCHENECTADY, NY	CROSS-FIRE IGNITION	12-MAR-2015	31-DEC-2015

Current Personal Services Distribution

Project	%	Total	Jul	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	June
160131Q	1.50%	2,025.96	306.56	429.85	429.85	429.85	429.85	0.00	0.00	0.00	0.00	0.00	0.00	0.00
1606680	58.33%	78,995.77	0.00	0.00	0.00	0.00	0.00	11,285.11	11,285.11	11,285.11	11,285.11	11,285.11	11,285.11	11,285.11
1606BEC	40.17%	54,399.59	10,978.55	10,855.26	10,855.26	10,855.26	10,855.26	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total	100.00%	135,421.32	11,285.11	11,285.11	11,285.11	11,285.11	11,285.11	11,285.11	11,285.11	11,285.11	11,285.11	11,285.11	11,285.11	11,285.11

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Section 5: Tips and Techniques

Helpful Hints!!

➢ To view by project, enter the new Project /SpeedType Number. To view by person, enter the Employee ID number or name.

➢ The (Tab) key rather than the (Enter) key is essential to navigation in the SPD Panels.

➢ A (Shift F4) allows a partial search.

➢ Account/Object Codes can only be changed via a new PSF Form. PSF Forms submitted to Human Resources will "Drive" the information showing in SPD.

➢ If an employee has more than one job appointment (as indicated by the job record number), a separate SPD Panel will appear for each job record.

➢ Us the scroll bar on the Future Pay Period Panel to select the Accounting Period you wish to view.

➢ If you have any questions regarding SPD Changes, please e-mail spd.ask@business.gatech.edu

Georgia Institute of Technology
SALARY PLANNING AND DISTRIBUTION (SPD) TRANSMITTAL FORM

GL/Org Number _____ GL / Org Name _____ Mail Code _____

Employee Name _____ Employee ID # _____

Contact/Approval Information

Requested By:		Title:	
Date:	Phone:	Email:	Fax:
Approved By:		Date:	
Approved By: (if Shared)		Date:	Org No.	Mail Code
Approved By: (if Shared)		Date:	Org No.	Mail Code

Past Pay Period Changes   ☐ Current FY   ☐ Prior FY

NOTE: *For all changes made TO externally-funded sponsored projects**, you must choose a justification reason. If "Other" is selected, enter detailed explanation.*

JUSTIFICATION REASONS: **

	1. Correction of labor charges based on review by employee, PD/PI, or authorized delegate.
	2. Correction of clerical error or data input identified by authorized unit financial personnel.
	3. New Award costs incurred during the award period charged temporarily to other allowable funds pending establishment of a new award/fund.
	4. Allowable pre-award costs (incurred prior to the award period) initially charged to other allowable funds.
	5. Renewal award costs charged originally to prior sponsored increment or to other allowable funds.
	6. Other: Specify below

(a) Explain why the expense was not originally charged to the correct project.

(b) Explain how the expense benefits the scope of work on the "TO" project.

JUSTIFICATION FOR LATE TRANSFER (Complete this section for requests over 90 days, **MAIL ORIGINAL DOCS ONLY**) **

Pay Period End Date:		**Date of Request:**	1/0/1900	**Days Late:**	0

(c) Explain why the error was not identified and corrected timely (within 90 days of the Pay Period End date).

(d) Explain what steps are in place to prevent the need for a late cost transfer going forward.

** Excludes sponsored projects funded by Georgia Tech Foundation and Georgia Tech Research Corporation. Transfers between projects associated with the same sponsored fund (award) are not subject to special justification requirements or the 90 day limitation.

For Grants & Contracts SPD Center ONLY

Changes Entered By:_____ Date:_____

Control Number:_____ To Project Acctg _____ Phone Number:_____

RETURN FORMS TO: **Grants & Contracts Accounting**
                                          SPD Center
                                          Mail Code 0259
Revised 10/15   Or FAX TO: 4-1514