

HELPFUL TIPS AND INFORMATION FOR THE PROCESSING OF A “REQUEST FOR SALARY REDISTRIBUTION”

Deadline

Due to the more stringent guidelines enacted by Central and Auditing agencies, we will be establishing a monthly deadline for accepting “Requests for Salary Redistribution” in the Office of Administrative Services. This deadline will allow adequate time for verifying and processing the request in order to meet the central monthly deadlines and that the appropriate funds are charged, including restricted federal funds.

Effective immediately, the monthly deadline for submission of “Requests for Salary Redistribution” forms will be the 20th of each month. (If the 20th falls on a non-workday, the deadline will be the last work day prior to the 20th). As normal, requests should be sent to Denise Miller at dls3@psu.edu. Anything received after the deadline may not be able to be processed in time to post in the requested month. Therefore, additional information/support may be required to complete the requested distribution change and it will be the requesting unit's responsibility to compile the new request in time for the next deadline. If the change is being done as part of a grant closing action, you must make sure that it not only meets the processing deadline but that it is within the guidelines established for grant closings.

Reason for Transfer and Explanations

In order to meet auditor requirements, we need to provide complete explanations for the “reason for transfer” and “explanation” fields on ALL requests.

For “reason for transfer”, this field should state why the change is being made at this time. One example would be: “Dr. Smith's PDA Tomato Grant which started in August 2011 was not fully established in the University financial system in time to record his August effort expended in support of the Tomato grant program. The grant was established September 8, 2011 and this transaction is requested to properly report Dr. Smith's August effort on the Tomato Grant.”

For the “explanation” field, this should state why initial funds were charged and how it relates to the destination fund. One example would be: “Transfer charges from employee's base funding to the PDA Tomato grant for effort this fiscal year”.

To simply say “for effort” is not providing enough information in order to satisfy a University or Federal Auditor. If we can better explain up front, this will help to avoid questions and disallowances from an auditor later.

In the future, if a unsatisfactory explanation or reason for transfer is given, the

form will be returned for more details and will be subject to the same processing deadlines.

Missing or Incorrect Sub Objects and Cost Centers

In some cases, we are receiving requests with missing sub object and/or cost center OR incorrect information. Please make sure that ALL information is included on the request. For funds where salary is currently being charged, you must verify on the UDFS screen in IBIS the current sub object and/or cost center. This will provide efficiency in processing the request.

If submitting a request that involves “charging” funds from another department inside or outside our college, you must obtain all needed sub objects and cost centers prior to submission to our office.

Most importantly, if incorrect cost center numbers are given we will have incorrect postings and therefore, incorrect reports at year end which requires additional work in order to correct. Also, if incorrect information is reported it could result in a loss of funding and disallowances are the responsibility of the unit.

Grant Beginning and End Dates

Please be aware of beginning and ending dates on grants. Salaries cannot be charged outside the grant period.

Please note: If a grant ends on a date other than the final work day of month when payroll is posted, the salary cannot be charged for that month in the pay & effort system. This includes posting a “partial” salary for that month.

Multiple Requests

Please be aware of processing multiple changes for the same employee within a few days. If multiple requests are for the same P.I., requests can be submitted on the same form. This can help save time and would mean less transactions.

Submission and Approvals

The preferred method of submission of a request is via email. This helps to verify the date received and avoids loss of a paper form. In addition, this helps if there are any problems or questions.

Reminder: For approvals, if charging a grant, P.I. approval is required. If charging department general funds, Budget Administrator approval is required. Forms should be sent to the appropriate approver via email, requesting that they respond with their approval. (Detailed instructions were provided previously with the “Request for Salary Redistribution” form.)

If submitting a request that involves charging funds from another department

inside or outside our college, you should forward the request for their approval prior to submission to our office.

If you have any questions, please contact our office and we would be glad to answer your question.

Thank you for your attention to these details, so that we may process your requests as timely and smoothly as possible for you.