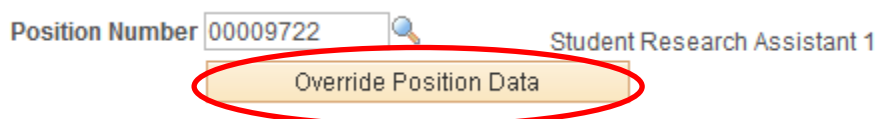


# HRA Dialogue

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February 18, 2015

- **Students no longer need to be placed in positions based on number of hours worked.**
  - Due to the ACA, we originally communicated that students had to be placed in positions in PeopleSoft reflecting the exact number of hours worked per week. We have recently learned that only the actual number of hours worked per week is relevant. **Therefore, it is acceptable to place student employees in generic 20 hour positions whether or not they actually 20 hours per week.**
  - It is important to remember, however, that students cannot have a combined standard hours greater than 28 hours while enrolled or greater than 38 hours while not enrolled.
    - You can hire a student into a 20 hour position even if they have a concurrent record at 20 hours already. The Service Center will simply override the position data in Job Data to enter the appropriate number of hours for their new position. When hiring, request that job data reflect the hours hired within each department.



- **Important things to remember when entering DRD/PET HRAs**
  - Bob Oyer shared some great information on the most effective way to enter HRAs for DRDs that helps clarify information for the Service Center. **The best way to clearly state what you want done is to reiterate what needs to happen in the Additional Information.** Important information to include and things to remember:
    - **Specify the amount of money to be transferred *per* month or pay period. Use the \$ amount and not *just* the % to be transferred.**
      - Additionally, if the DRD/PET is for multiple months or pay periods and occurs during an AMCP period (or any other pay rate change), please state the different amounts to be moved per month.
      - Only providing the Service Center with the total amount to be transferred causes confusion if the request is for multiple months.

See attached examples.

- Is the chartfield consistent for the time period identified? **If necessary, specify the “from” and “to” chartfields if they vary from month to month or pay period to pay**

# HRA Dialogue

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**period if you are entering them on the same HRA.**

- Are you moving the entire amount? **It is helpful to indicate whether you are moving a full or partial amount.**
- If the begin date is over 90 days, please remember to answer all four questions. **Departments are responsible for answering the last two questions for requests over 90 days.**
- Bob mentioned that he saves “templates” of the information he enters in his DRD requests that he can simply copy and paste into each new HRA. This is a great way to remember what information is pertinent and to keep your HRAs consistent.
- Recapping what Bob tries to do for additional info:
  - Determine if chartfields are the same for the whole period. If not, then prepare a separate HRA.
  - Determine if dollar amounts are same for all months (MO) or pay periods (BW).
  - Recap the period covered by the request.
  - Identify dollar amounts per each month(s) or pay period, and the grand total \$ for period, i.e., per the chartfield rows.
  - Cross reference if a DBT change is also requested.

<b>HRA#</b>	<b>Request Status</b>	<b>Completion Date</b>	<b>Completed By</b>
213093	COMPLETE	02/17/2015 5:26 PM	Marini, Crystal N

<b>Supervisor Contact Information</b>	
<b>Name</b>	Metzger, James David (94016398)
<b>Department</b>	11270 Horticulture & Crop Science
<b>Phone</b>	614/292-3854
<b>Email</b>	metzger.72@osu.edu

<b>Change Funding Source Detail</b>	
<b>Is this request for multiple employees?</b>	No
<b>Employee / OSU ID</b>	<b>Name (Last, First)</b>
<b>Employee</b>	
<b>Employee Record</b>	0
<b>Funding Type</b>	Retroactive Distributions
<b>Begin Date</b>	7/1/2014
<b>End Date</b>	10/31/2014

<b>Funding Source Changes</b>								
<b>Funding Source(s) for Dates Entered Above</b>								
Pay End Date: 08/31/2014								
<b>Org</b>	<b>Fund</b>	<b>Account</b>	<b>Project</b>	<b>Program</b>	<b>User Defined</b>	<b>Amount</b>	<b>Release Time</b>	<b>Funding End Dt</b>
11270	011000	60033				1280.1	No	
56270	530189	60033				6144.48	No	
56270	530189	60033	60036335		CS	1109.42	No	
Pay End Date: 10/31/2014								
<b>Org</b>	<b>Fund</b>	<b>Account</b>	<b>Project</b>	<b>Program</b>	<b>User Defined</b>	<b>Amount</b>	<b>Release Time</b>	<b>Funding End Dt</b>
11270	011000	60033				1292.85	No	
56270	530189	60033				6205.68	No	
56270	530189	60033	60036335		CS	1120.47	No	
Pay End Date: 07/31/2014								
<b>Org</b>	<b>Fund</b>	<b>Account</b>	<b>Project</b>	<b>Program</b>	<b>User Defined</b>	<b>Amount</b>	<b>Release Time</b>	<b>Funding End Dt</b>
11270	011000	60033				1280.1	No	
56270	530189	60033				6144.48	No	
56270	530189	60033	60036335		CS	1109.42	No	
Pay End Date: 09/30/2014								
<b>Org</b>	<b>Fund</b>	<b>Account</b>	<b>Project</b>	<b>Program</b>	<b>User Defined</b>	<b>Amount</b>	<b>Release Time</b>	<b>Funding End Dt</b>
11270	011000	60033				1292.85	No	
56270	530189	60033				6205.68	No	
56270	530189	60033	60036335		CS	1120.47	No	
<b>Proposed Funding Source</b>								
<b>Move Expense From (only rows being changed need to be entered)</b>								
<b>Enter Chartfield by</b>	<b>Amount</b>							

Org	Fund	Account	Project	Program	User Defined	Amount	Release Time
56270	530189	60033				3430.6	No

**Move Expense To (only rows being changed need to be entered)**

Org	Fund	Account	Project	Program	User Defined	Amount	Release Time
56270	590000	60033	60047353	15079		3430.6	No

**Why was this expense originally charged to chartfield from which it is now being transferred?**

normal department appointment

**Why should this charge be transferred to the proposed receiving sponsored project?**

Per dept/PI request for 10% OSP release ime beginning retro July 2014.

**If begin date is more than 90 days ago, please explain why this cost transfer is being requested more than 90 days after the occurrence of the original transaction.**

Project was not activated until October 2014.

**If begin date is more than 90 days ago, please explain what action is being taken to eliminate future need for cost transfers of this type.**

timely closeout of former project by this sponsor

Information in his request is viewable and subject to disclosure under the Ohio public records statute and rules of discovery.

**Additional Information (Business Purpose/Reason, etc.)**

DRD for period July-Oct'14 at 10% per month (more than 90 days ago).  
 July-Aug at \$853.40 /mo and Sept-Oct at \$861.90 /mo (\$3430.60 total over 4mos).  
 See also separate HRA/DRDs for Nov-Dec-Jan'15 (under 90 days) and HRA/DBTable eff 2-1-15.  
 Request by OARDC Fiscal Office / R.Oyer

Attachments	
File Name	Description
<a href="#">RTCS Feb2015.pdf (#)</a>	
<a href="#">A02895-A02898.pdf (#)</a>	PETs

Comments
There are currently no comments

Central Payroll Correction Needed

**Instructions to Central Payroll**

**Service Center Activity**

Service Center Action	Action Taken
No HR System Action	PETs A02895-A02898 submitted for July-October respectively. See attached.

Activity Status	Activity Log
Complete	<ul style="list-style-type: none"> <li>02/17/2015 05:26 PM [Marini,Crystal N] PETs pending PI review</li> </ul>
<b>Assigned To</b> Marini,Crystal N	

**HRA Request - Change Funding Source**  
HRA#213189 - Status: COMPLETE

Completed: 02/16/2015  
Completed By: Marini, Crystal N

**Supervisor** Metzger, James David (94016398)  
**Department** Horticulture & Crop Science (11270)  
**Phone** 614/292-3854  
**Email** metzger.72@osu.edu

**Change Funding Source Detail**

**Is this request for multiple employees?** No  
**Employee/OSU ID**  
**Employee Name**  
**Employee Record** 0  
**Funding Change Type** Retroactive Distributions  
**Begin Date** 11/1/2014  
**End Date** 1/31/2015

**Funding Source Changes**

**Funding Source(s) for Dates Entered Above**

Org	Fund	Account	Project	Program	User Defined	Percent	Amount	Release Time	Funding End Date
56270	530189	60033	60027524		CS	0	496.8		
56270	530189	60033	60027524		CS	0	496.8		
56270	530189	60033	60027524		CS	0	496.8		
56270	530189	60033	60033250		CS	0	1987.2		
56270	530189	60033	60033250		CS	0	1987.2		
56270	560344	60033	OHO01242H			0	7452		
56270	560344	60033	OHO01242H			0	7452		
56270	560344	60033	OHO01242H			0	9439.2		

**Move Expense From (only rows being changed need to be entered)**

**Enter Chartfield by Amount**

Org	Fund	Account	Project	Program	User Defined	Amount	Release Time
56270	560344	60033	OHO01242H			1490.4	

**Move Expense To (only rows being changed need to be entered)**

**Enter Chartfield by Amount**

Org	Fund	Account	Project	Program	User Defined	Amount	Release Time
56270	530189	60033	60047028		CS	1490.4	

**Why was this expense originally charged to chartfield from which it is now being transferred?**

Normal department appointment

**Why should this charge be transferred to the proposed receiving sponsored project?**

Per dept/PI request for 5% OSP cost share beginning retro Oct 2014.

**If begin date is more than 90 days ago, please explain why this cost transfer is being requested more than 90 days after the occurrence of the original transaction.**

**If begin date is more than 90 days ago, please explain what action is being taken to eliminate future need for cost transfers of this type.**

**Additional Information**

- HRA/DRDs for Nov-Dec-Jan'15 (under 90 days) at 5% or \$496.80 /mo (\$1490.40 total over 3mos).
- See separate HRA/DRD for Oct'14 (over 90 days ago) and HRA/DBTable eff 2-1-15.
- Request by OARDC Fiscal Office / R.Oyer

**Comments**

**Attachments**

- RTCS Feb2015 #2.pdf
- HCS email approval Feb2015.pdf

**Workflow Information**

**Central Payroll Correction Needed**

N

**Instructions for Central Payroll**

**Service Center Activity**

**Service Center Action**

Retro Distribution

**Begin Date**

11/01/2014

**End Date**

01/31/2015

**Run Control ID**

20009994900000227

**Payroll Action Taken**

N

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**Activity Status**

Complete

**Assigned To**

Marini, Crystal N

**Payroll Activity Status**

**Payroll Analyst**

**Activity Log**

<b>HRA#</b>	<b>Request Status</b>	<b>Completion Date</b>	<b>Completed By</b>
207916	COMPLETE	02/05/2015 12:30 PM	Marini, Crystal N

<b>Supervisor Contact Information</b>	
<b>Name</b>	Shearer, Scott Allan (81002232)
<b>Department</b>	11230 Food, Agr & Biological Eng
<b>Phone</b>	614/292-7284
<b>Email</b>	shearer 95@osu.edu

<b>Change Funding Source Detail</b>	
<b>Is this request for multiple employees?</b>	No
<b>Employee / OSU ID</b>	<b>Name (Last, First)</b>
<b>Employee</b>	
<b>Employee Record</b>	0
<b>Funding Type</b>	Retroactive Distributions
<b>Begin Date</b>	10/1/2014
<b>End Date</b>	12/31/2014

<b>Funding Source Changes</b>									
<b>Funding Source(s) for Dates Entered Above</b>									
Pay End Date: 10/31/2014									
Org	Fund	Account	Project	Program	User Defined	Amount	Release Time	Funding End Dt	
11230	011000	60033				1189.87	No		
11230	011000	60033	60036529		CS	216.34	No		
11230	590000	60033	60046661		BROWLC	757.19	No		
55230	530801	60033		13792		1081.7	No		
55230	530801	60033	60034686	13792	CS	2163.4	No		
55230	530801	60033	60036529	13792	CS	865.36	No		
55230	560808	60033		13792		1298.04	No		
56230	530189	60033	60036529		CS	1081.7	No		
56230	560344	60033	OHO00179H			1005.98	No		
56230	590000	60033	60036529	15079		216.34	No		
56230	590000	60033	60046661	15079		941.08	No		
Pay End Date: 12/31/2014									
Org	Fund	Account	Project	Program	User Defined	Amount	Release Time	Funding End Dt	
11230	011000	60033				1947.06	No		
11230	011000	60033	60036529		CS	216.34	No		
55230	530801	60033		13792		1081.7	No		
55230	530801	60033	60034686	13792	CS	2163.4	No		
55230	530801	60033	60036529	13792	CS	865.36	No		
55230	560808	60033		13792		1298.04	No		
56230	530189	60033	60036529		CS	1081.7	No		
56230	560344	60033	OHO00179H			1947.06	No		
56230	590000	60033	60036529	15079		216.34	No		

Pay End Date: 11/30/2014

Org	Fund	Account	Project	Program	User Defined	Amount	Release Time	Funding End Dt
11230	011000	60033				1189.87	No	
11230	011000	60033	60036529		CS	216.34	No	
11230	590000	60033	60046661		BROWLC	757.19	No	
55230	530801	60033		13792		1081.7	No	
55230	530801	60033	60034686	13792	CS	2163.4	No	
55230	530801	60033	60036529	13792	CS	865.36	No	
55230	560808	60033		13792		1298.04	No	
56230	530189	60033	60036529		CS	1081.7	No	
56230	560344	60033	OHO00179H			1005.98	No	
56230	590000	60033	60036529	15079		216.34	No	
56230	590000	60033	60046661	15079		941.08	No	

**Proposed Funding Source**

Move Expense From (only rows being changed need to be entered)

Enter Chartfield by Amount

Org	Fund	Account	Project	Program	User Defined	Amount	Release Time
11230	011000	60033				1298.04	No

Move Expense To (only rows being changed need to be entered)

Org	Fund	Account	Project	Program	User Defined	Amount	Release Time
11230	011000	60033	60034686		CS	1298.04	No

Why was this expense originally charged to chartfield from which it is now being transferred?

Original department appointment on general funds

Why should this charge be transferred to the proposed receiving sponsored project?

To charge/reflect the individuals appropriate time and effort to project

If begin date is more than 90 days ago, please explain why this cost transfer is being requested more than 90 days after the occurrence of the original transaction.

Reviewed cost share and release time and feels switch is appropriate

If begin date is more than 90 days ago, please explain what action is being taken to eliminate future need for cost transfers of this type.

Make sure to inform in a shorter timeframe

Information in his request is viewable and subject to disclosure under the Ohio public records statute and rules of discovery.

**Additional Information (Business Purpose/Reason, etc.)**

DRD for Oct-Nov-Dec'14 to assign 4% cost share on OSP project, per dept/PI request.

Oct-Dec at \$432.68 per Mo. for total period \$1298.04.

See also separate HRA for July-Sept'14 with different chartfields.

Initiated by OARDC Fiscal Office / R.Oyer

**Attachments**

File Name	Description
<a href="#">RTCS</a> <a href="#">11230 Feb2015.pdf</a> (#)	

**Comments**

There are currently no comments



File Name	Description
<a href="#">emial re changes.pdf (#)</a>	
<a href="#">A02767.pdf (#)</a>	PET

Central Payroll Correction Needed

**Instructions to Central Payroll**

**Service Center Activity**

	<b>Begin Date</b>
	11/01/2014
<b>Service Center Action</b>	<b>End Date</b>
Retro Distribution	12/31/2014
	<b>Run Control ID</b>
	20009994900000221
<b>Service Center Action</b>	<b>Action Taken</b>
No HR System Action	Submitted PET A02767 for November. See attached.

<b>Activity Status</b>	<b>Activity Log</b>
Complete	
<b>Assigned To</b>	<ul style="list-style-type: none"> <li>02/05/2015 12:29 PM [Marini,Crystal N]</li> </ul>
Marini,Crystal N	PET pending PI review.