

User's Guide to 800 Forms

Human Resource Management System

HRMS Guide to 800 Forms

800 Forms – OVERVIEW

From July '05 (fiscal year '06) forward, HRMS is the source of all salary distribution and reallocation information. There is no need to do additional spreadsheets or memos, but justification on the form should be as detailed as possible for reallocations over three months.

The 800 form and 800 forms for Extra Comp are used to move money already paid if different FAO's need to be charged than what was used at the time the pay periods were processed.

Cost Share is now stored in HRMS with actual percentages for grant accounts and offset accounts using sequence numbers to keep them in pairs (Cum Sal will now also show actual percentages).

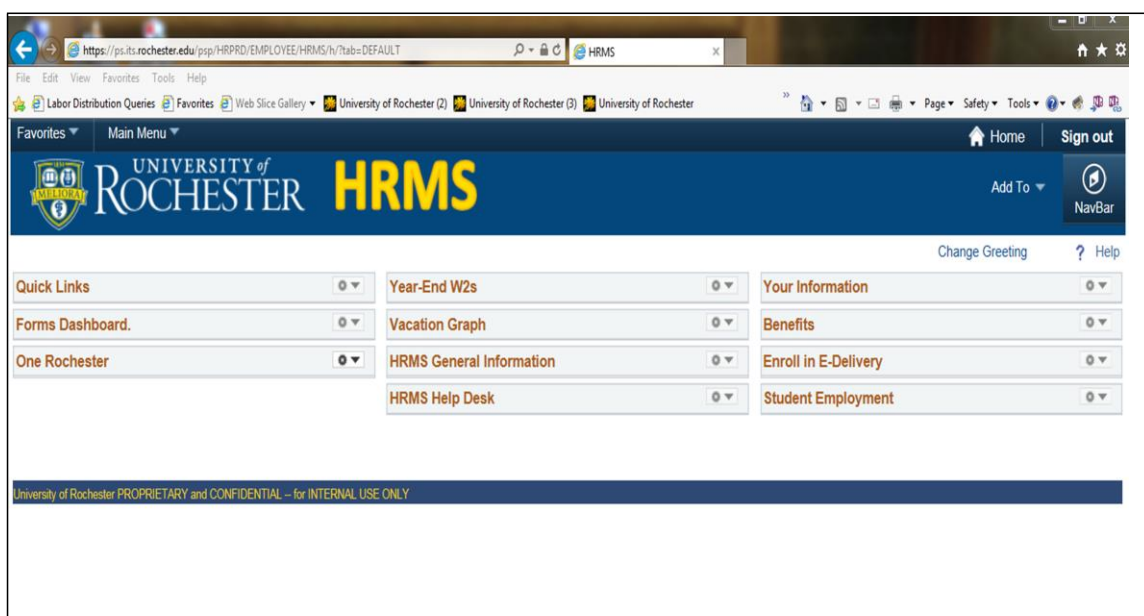
The Cost Share form is the combination of the present Cost Share and 800 form. The Cost Share Form can be used to apply the HHS Cap or when using Other to show what should have been charged to the GR FAO or not a HHS FAO that also may have a salary cap.

Labor Distribution queries are available. They can be accessed as follows:

Lbr by Pay Period for empl, Lbr by Pay Period for an acct (FAO), Lbr by Pay Period for all empl, Employee Default Acct Distrib, Lbr by Pay Period Extra Comp.

ENTERING THE SYSTEM

1. Open Internet Explorer, Netscape or Safari (MACs).
2. Use HRMS link www.rochester.edu/people
3. Click 'OK' on Security Alert (*may be machine dependent*).
4. Log in: UserID and password are case sensitive.



LABOR DISTRIBUTION QUERIES

From the HRMS Menu Click 'UR Reports and Interfaces' > 'Labor Distribution' > 'Labor Distribution Queries.' Select the desired link.

Query Viewer

Query	Personalize	Find	View All	First	1-5 of 5	Last
Query Name	Description	Run to HTML	Run to Excel			
UPY1000	Lbr by Pay Period for empl	HTML	Excel			
UPY1010	Lbr by Pay Period for an acct	HTML	Excel			
UPY1020	Lbr by Pay Period for all empl	HTML	Excel			
UPY1030	Employee Default Acct Distrib	HTML	Excel			
UPY1040	Lbr by Pay Period Extra Comp	HTML	Excel			

View Summary of Account by Pay Period:

1. Click on link Excel or HTML.
2. Enter Employee ID and dates.
3. Click 'View Results.'

Lbr by Pay 4														
ID	Empl Recor	Employee Name	Pay Period End	FAO Acct	FAC Category	FAC Description	Pct	Sum Dollar Amt	Realloc	DT Entered	Cost Sharing	Cost FAO	SeqN	Sum Ben Rate
201069	0	Red,Rhonda	7/15/2016	OP231528	SC58100	PAS Regular Salaries	100.00	1478.53		7/12/2016			0	473.13
201069	0	Red,Rhonda	7/31/2016	OP231528	SC58100	PAS Regular Salaries	100.00	1478.53		7/26/2016			0	473.13
201069	0	Red,Rhonda	8/15/2016	OP231528	SC58100	PAS Regular Salaries	100.00	1478.53		8/11/2016			0	473.13
201069	0	Red,Rhonda	8/31/2016	OP231528	SC58100	PAS Regular Salaries	100.00	1478.53		8/25/2016			0	473.13

To create reports for Lbr by Pay Period for Empl, View Paycheck Data for All Employees, View Employee Default Acct Distribution, and View Extra Comp by Pay Period, follow the same process. You choice to run these reports to Excell or HTML. To exit the report, click the X on the top right of the page.

ACCOUNT DISTRIBUTION FOR EMPLOYEE

To view the current distribution that is recorded in HRMS:

1. Click 'UR Reports and Interfaces' > 'Labor Distribution' > 'Acct Distribution for Employee.'
2. Enter Employee ID or Last Name.
3. Click 'Search' to view the account distribution which includes account number(s), sub code(s) and distribution percentage(s).

Acct Distribution for Employee

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:

Empl Record:

Name:

Acct Distribution

Rhonda Red Empl ID: 201069 Empl Record: 0

Labor Account Distribution Find | View All First 1 of 1 Last

Effective Date: 12/14/2014 Status: A Empl Record: 0

Account Data							Personalize Find	First 1 of 1 Last
FAO (Account)	HHS Seq #	Distribution %	Cost Sharing	Cost Sharing FAO	End Date	Date Last Updated	Last Updated By	
OP134570		100.00				12/29/2014	WD Impl	

800 REALLOCATION FORM

To reallocate funds, create the form, print it, and have the authorized signatures as before and including a signature on the Certification line. (Departmental processes have not been changed.)

1. Click 'UR Reports and Interfaces' > 'Labor Distribution' > '800 Form'.
2. To set up a run control, use either 'Add A New Value' or 'Find An Existing Value.' **NOTE:** You may want to create a new Run Control ID for each 800 form as a temporary record-keeping tool.

800 FORM - Does not include Extra Comp

Run Control ID 800Red Report Manager Process Monitor Run

Emplid and Empl Rcd 201069-0 Rhonda Red This is only valid for data from FY 2006 & later

From Date: 07/01/2016 Thru Date: 08/31/2016

Justification for Payroll Cost Transfer: Clear All

Loaned Rhonda for on week to another area.

Prepared By: 201068 Bonnie Blue

FAO Data


	FAO (Account)	FAO Description	Percent
1	OP134570	NS 3-1800	50.00
2	OP134514	NS 3-3400	50.00

3. Either fill in or look up Employee ID dash record number (123456-0). **NOTE:** Employee Record Number MUST be included after the Employee ID.
4. Enter reallocation dates using appropriate pay period begin and end dates.
5. Use 'Justification' to explain reason for reallocation. If the reallocation goes back more than 90 days, the explanation needs to have a detailed reason why the move is needed and why it was not done in a timely manner. This box REPLACES the memo that was formerly sent to Payroll; however, it does **not** notify the user if the reason is not a valid reason for a reallocation.
6. Enter FAO; a description is added by the system then enter the percentage of pay that needs to be reallocated to that account. **NOTE:** System does not know which accounts 'belong' to your department; be careful to use correct account codes. *If and FAO is inactive, you cannot reallocate to it unless you have ORACS activate the FAO. Even if there is no change ALL FAO's must be active to process the form.*
7. If additional FAO's need to be used, click on the plus sign on the left-hand side of the page for additional lines. There is no limit to the number of FAO's you can use; however, percentages must add up to 100%.
8. Click 'Run' and follow process for running reports in HRMS. Make sure there is a signature on the certification line. 800 Form will be at least four pages long, all pages must be sent to payroll: see [Appendix A](#).

800 FORM FOR EXTRA COMP

NOTE: To **reallocate** extra comp, **use an 800 Form for Extra Comp**. Click 'UR Reports and Interfaces' > 'Labor Distribution' > '800 Form for Extra Comp'. This form is created using the same method as the regular 800 form; the report is only one page. Extra comp is used for EXT, ADD, YPO, VPO, PPO, SGN, and maybe others.

[Favorites](#) > [Main Menu](#) > [UR Reports and Interfaces](#) > [Labor Distribution](#) > [800 Form for Extra Comp](#)


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800 Form for Extra Comp

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

Use Saved Search:

Run Control ID: begins with

☐ Case Sensitive

800 Form for Extra Comp

Run Control ID: brown
 [Report Manager](#)
[Process Monitor](#)

EXTRA COMP ONLY

Emplid and Empl Rcd: 201073-0 Becky Brown

From Date: 01/10/2016 Thru Date: 01/23/2016

*Justification for Payroll Cost Transfer
 YPO Charged to incorrect account number.

Prepared By:

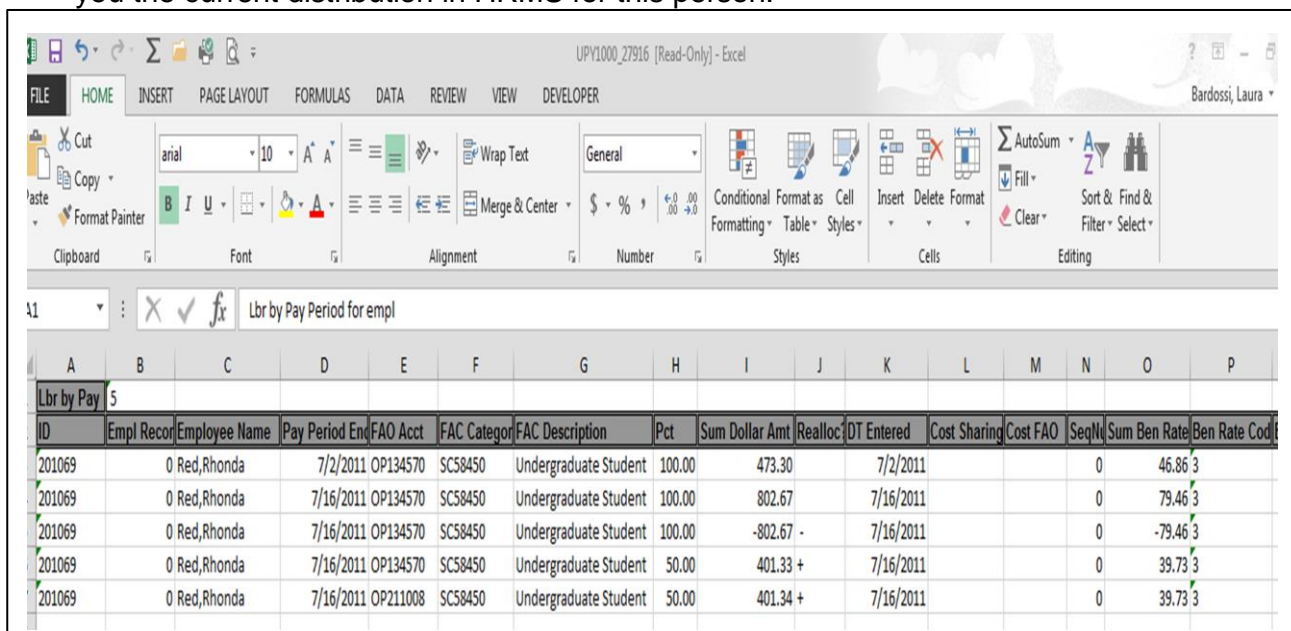
Account Code data for Reallocation

Personalize Find <input type="button" value="Print"/> <input type="button" value="Refresh"/>				First	1 of 1	Last
	FAO (Account)	Description	Percent			
1	<input type="button" value="+"/> <input type="button" value="-"/> <input type="text"/> OP136555 <input type="button" value="Search"/>	Diagnostic X-ray	<input type="text"/> 100.00			

Total Percentage: 100.00

REALLOCATION OF PREVIOUSLY REALLOCATED FUNDS

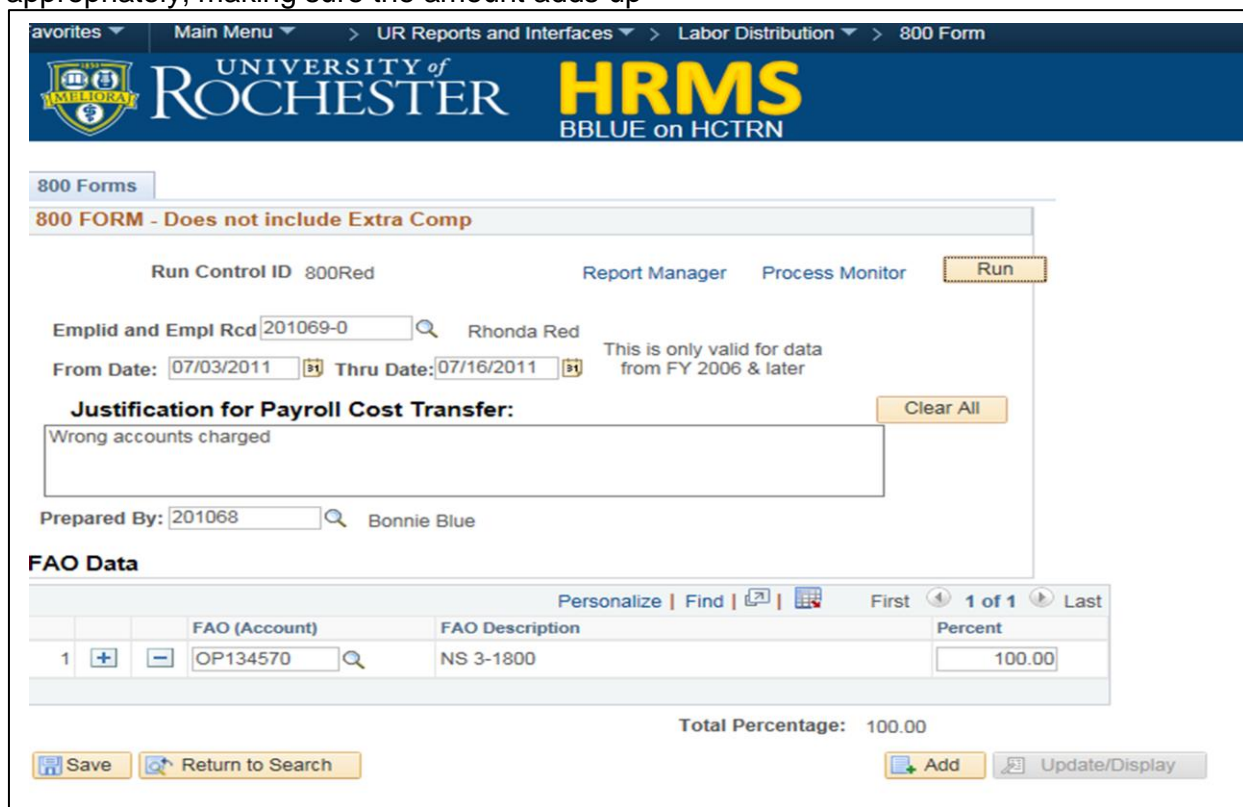
1. View 'Summary of Accounts by Pay Period'. Follow steps 1-3 on [page 2](#). This will show you the current distribution in HRMS for this person.



The screenshot shows an Excel spreadsheet titled 'UPV1000_27916 [Read-Only] - Excel'. The formula bar shows 'Lbr by Pay Period for empl'. The spreadsheet displays a table with columns: ID, Empl Recor, Employee Name, Pay Period End, FAO Acct, FAC Category, FAC Description, Pct, Sum Dollar Amt, Realloc, DT Entered, Cost Sharing, Cost FAO, Seq No, Sum Ben Rate, and Ben Rate Code. The data is for employee 201069, Rhonda Red, for the pay period 7/2/2011 to 7/16/2011, showing a reallocation of funds from account OP134570 to account NS 3-1800.

ID	Empl Recor	Employee Name	Pay Period End	FAO Acct	FAC Category	FAC Description	Pct	Sum Dollar Amt	Realloc	DT Entered	Cost Sharing	Cost FAO	Seq No	Sum Ben Rate	Ben Rate Code
201069	0	Red, Rhonda	7/2/2011	OP134570	SCS8450	Undergraduate Student	100.00	473.30		7/2/2011				46.86	3
201069	0	Red, Rhonda	7/16/2011	OP134570	SCS8450	Undergraduate Student	100.00	802.67		7/16/2011				79.46	3
201069	0	Red, Rhonda	7/16/2011	OP134570	SCS8450	Undergraduate Student	100.00	-802.67		7/16/2011				-79.46	3
201069	0	Red, Rhonda	7/16/2011	OP134570	SCS8450	Undergraduate Student	50.00	401.33	+	7/16/2011				39.73	3
201069	0	Red, Rhonda	7/16/2011	OP211008	SCS8450	Undergraduate Student	50.00	401.34	+	7/16/2011				39.73	3

2. Follow steps 1 through 8 on [page 4](#) for a reallocation redistributing the funds appropriately, making sure the amount adds up



The screenshot shows the University of Rochester HRMS 800 Form interface. The header includes the University of Rochester logo and the text 'HRMS BBLUE on HCTR'. The main content area shows the '800 FORM - Does not include Extra Comp' report. The 'Run Control ID' is 800Red. The 'Report Manager' and 'Process Monitor' buttons are visible. The 'Run' button is highlighted. The 'Emplid and Empl Rcd' field is 201069-0, and the 'Employee Name' is Rhonda Red. The 'From Date' is 07/03/2011 and the 'Thru Date' is 07/16/2011. The 'Justification for Payroll Cost Transfer' field contains 'Wrong accounts charged'. The 'Prepared By' field is 201068, and the 'Prepared By Name' is Bonnie Blue. The 'FAO Data' section shows a table with columns: FAO (Account), FAO Description, and Percent. The table contains one row: 1, OP134570, NS 3-1800, 100.00. The 'Total Percentage' is 100.00. The 'Save' and 'Return to Search' buttons are visible at the bottom.

800 FORM - Does not include Extra Comp

Run Control ID: 800Red

Report Manager Process Monitor **Run**

Emplid and Empl Rcd: 201069-0 Rhonda Red

From Date: 07/03/2011 Thru Date: 07/16/2011

This is only valid for data from FY 2006 & later

Justification for Payroll Cost Transfer:

Wrong accounts charged

Prepared By: 201068 Bonnie Blue

FAO Data

	FAO (Account)	FAO Description	Percent
1	OP134570	NS 3-1800	100.00

Total Percentage: 100.00

Save Return to Search Add Update/Display

3. Run 800 Form report; see Appendix B for example.

REALLOCATION STATUS – FYI

To see a history of all reallocations and whether or not they have gone to FRS, use the 'Reallocation / Status' function.

From the HRMS menu click 'UR Reports and Interfaces' > 'Labor Distribution' > 'Reallocation/Status.'

Labor Re-Allocation Summary

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:

Name:

Empl Record:

☐ Include History ☐ Case Sensitive

Search **Clear** **Basic Search** **Save Search Criteria**

Summary

Empl ID: 201069 Red, Rhonda

Accounting Changes

Empl ID	#	Begin Date	End Date	FAO (Account)	FAC (Category)	Pct	Emcd	HHS?	Seq	Amount	Reallocate CWS?	FAO FROM (for Dollar Realloc)	FAC FROM (for Dollar Realloc)	Errors?	Gone to WD?	Run ID	Date/Time Stamp	Use
1	201069	07/10/2005	08/06/2005	OP211008	SC57400	25.00		N			<input type="checkbox"/>			N	N		10/03/05 9:22AM	PP
2	201069	07/10/2005	08/06/2005	OP211273	SC57400	50.00		N			<input type="checkbox"/>			N	N		10/03/05 9:23AM	PP
3	201069	07/10/2005	08/06/2005	OP211008	SC57400	25.00		N			<input type="checkbox"/>			N	N		10/03/05 9:23AM	PP
4	201069	07/10/2005	08/06/2005	234570	1700	50.00		N			<input type="checkbox"/>			N	Y		09/28/05 11:09AM	KBF
5	201069	07/10/2005	08/06/2005	211008	1700	50.00		N			<input type="checkbox"/>			N	Y		09/28/05 11:11AM	KBF

of pay end dates not sent to FRS Total Percentage:

Save **Return to Search** **Notify** **Update/Display** **Incl**

COST SHARING FORM


When a salary cap or cost share is involved, the change can be for a reallocation only or it can be prospective only.

1. Click on 'Cost Sharing Form'; enter the information for the employee, the dates and the justification.
2. Select one of the two choices: 'Reallocation Only' or 'Prospective Change.' The 'Reallocation' category is used for any retroactive changes must have from and thru date; the 'Prospective' category is used for what will be paid going forward and needs only a from date.
3. Use the HHS Salary Cap Calculation fields to determine percentages of salary that should be on the GR FAO and NON GR FAO.
4. The 'Sequence Number' is used to link the GR FAO and non GR FAO together; begin with #1 and add additional numbers as additional caps or grants are entered.
5. Enter the annual salary and the percent of effort for the GR FAO.
6. Use the lookup to find HHS cap level. If additional lines are needed, use the plus sign.
7. Enter data in 'FAO data' section to reflect changes. Use the + to add rows as needed. Then click Save.
8. Click 'Run' and follow process for running reports in HRMS.

(screen shot follows)

Salary Cap Form (cont.)




[Favorites](#) > [Main Menu](#) > [UR Reports and Interfaces](#) > [Labor Distribution](#) > [Cost Sharing Form](#)



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Cost Sharing - Alloc & Realloc


Run Control ID: 800Doctor Report Manager Process Monitor [Run](#)



800 FORM - Does not include Extra Comp

Emplid and Empl Rcd:  Roger Research Asst
 From Date:  Thru Date:  [Clear All](#)
 Justification for Payroll Cost Transfer:


 Prepared By:  Bonnie Blue
☒ Reallocation only ☐ Prospective change only

















HHS Salary Cap Calculation

[Personalize](#) | [Find](#) |  First 1-2 of 2 Last

Seq #	Salary	Pct of effort charged to the award	Salary * Percent	HHS Cap	HHS Pct	Not HHS Pct	
1	<input type="text" value="1"/> 245620.000	<input type="text" value="20.00"/>	\$49,124.00	<input type="text" value="181500"/> 	14.78	5.22	+ -
2	<input type="text" value="2"/> 245620.000	<input type="text" value="10.00"/>	\$24,562.00	<input type="text" value="181500"/> 	7.39	2.61	+ -

FAO Data

[Personalize](#) | [Find](#) |  First 1-8 of 8 Last

	FAO (Account)	FAO Description	Percent	HHS	Cost Sharing	Seq #	End Date
1	+ - <input type="text" value="OP137513"/> 	Outpatient Pediatrics	<input type="text" value="5.22"/>	<input checked="" type="checkbox"/>	HHS Cap <input type="text" value="1"/>	<input type="text" value="1"/>	<input type="text" value="21"/> 
2	+ - <input type="text" value="GR525896"/> 	GR525896 1R18HL116244-01A	<input type="text" value="14.78"/>	<input type="checkbox"/>	<input type="text" value="1"/>	<input type="text" value="1"/>	<input type="text" value="21"/> 
3	+ - <input type="text" value="OP137513"/> 	Outpatient Pediatrics	<input type="text" value="2.61"/>	<input checked="" type="checkbox"/>	HHS Cap <input type="text" value="2"/>	<input type="text" value="2"/>	<input type="text" value="21"/> 
4	+ - <input type="text" value="GR528905"/> 	GR528905 5R01HL079954-07	<input type="text" value="7.39"/>	<input type="checkbox"/>	<input type="text" value="2"/>	<input type="text" value="2"/>	<input type="text" value="21"/> 
5	+ - <input type="text" value="OP349789"/> 	General Pediatric	<input type="text" value="19.00"/>	<input type="checkbox"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="21"/> 
6	+ - <input type="text" value="OP137513"/> 	Outpatient Pediatrics	<input type="text" value="20.00"/>	<input type="checkbox"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="21"/> 
7	+ - <input type="text" value="GF450321"/> 	Pediatric Resch Fund	<input type="text" value="21.00"/>	<input type="checkbox"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="21"/> 
8	+ - <input type="text" value="OP211409"/> 	Pediatrics	<input type="text" value="10.00"/>	<input type="checkbox"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="21"/> 

Total Percentage: 100.00

[Save](#) [Add](#) [Update/Display](#)

SALARY OVER THE CAP REPORT

1. Click on 'Salary Over the Cap' link.
2. Use either 'Add A New Value' or 'Find An Existing Value.'
3. Enter desired dates and account. If ALL salary caps are desired, leave account blank.
4. Click 'Run' and follow process for running reports in HRMS.

The following screen appears.

Favorites ▾ Main Menu ▾ > UR Reports and Interfaces ▾ > Labor Distribution ▾ > HHS Salary Over the Cap Report

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HHS Over the Cap Rept

Run Control ID BBLUE Report Manager Process Monitor **Run**

Report Parameters

From Date: 07/01/2005 Thru Date: 08/31/2005
 FAO (Account)
 To select all Salary Cap accts - leave FAO field blank

Save Return to Search Add Update/Display

Report ID: UPY8030	University of Rochester HHS OVER THE CAP REPORT	Page No. 1 Run Date 01/30/2017 Run Time 15:35:12									
Date Range: 07/01/2016 - 08/31/2016											
Pay End Dt	Emplid Rcd	Name	Dept	Sponsor	FAO	Seq	Amount	Pct	Responsible Person	Realloc	
07/31/2016	201065 0	Doctor, Dale	400081	DNHS	GR528905	GR528905 SR01HL07995	1	\$3,131.65	15.30%	Jill Suzanne Ha	
07/31/2016	201065 0	Doctor, Dale	400081		OP349769	General Pediatric	1	\$962.01	4.70%		
07/31/2016	201065 0	Doctor, Dale	400081	DNHS	GR528905	GR528905 SR01HL07995	1	\$-3,131.65	15.30%	Jill Suzanne Ha	- 08/15/16
07/31/2016	201065 0	Doctor, Dale	400081		OP349769	General Pediatric	1	\$-962.01	4.70%		- 08/15/16
							\$ 0.00	40.00%			
08/31/2016	201065 0	Doctor, Dale	400081	DNHS	GR528905	GR528905 SR01HL07995	1	\$3,084.58	15.07%	Jill Suzanne Ha	
08/31/2016	201065 0	Doctor, Dale	400081		OP349769	General Pediatric	1	\$1,009.09	4.93%		
							\$ 4,093.67	20.00%			

Appendix A —

Reallocation

University of Rochester
Proposed Change of Pay Distribution

Date Prepared: 02/07/2017
Emplid: 201069 0 Paygroup: SMO
Name: Red, Rhonda
Dept: 100100 Purchasing
Jobcode: 0565 Purchasing Asst
Date Range: 07/01/2016 - 08/31/2016

This is a reallocation only

Distribution prior to 07/01/2016 (Pay End Date: 06/30/2016)

FAO		HHS Data	
OP231528	100.00%		Program Management - Ob Gyn
TOTAL			100.00%

I certify that the pay distribution above is a reasonable reflection of effort devoted during the period prior to the effective date of this proposed change,
and the proposed distribution below is a reasonable estimate of effort for the period indicated.

Signature: _____ Date: _____

Proposed Distribution 07/01/2016 - 08/31/2016

<u>FAO</u>	<u>Pct</u>	<u>HHS</u>	<u>Seq</u>	<u>Description</u>	<u>Responsible Person</u>
OP134514	50.00%			NS 3-3400	
OP134570	50.00%			NS 3-1800	
TOTAL				100.00%	

FAOs outside your department require additional signatures.

Prepared by: Blue, Bonnie bonnie_blue@urmc.rochester.edu 275.1234 Box 654

Justification for Payroll Cost Transfer:

Loaned to another Department for half the time.

Recommending Officer: _____ Date: _____

Recommending Officer: _____ Date: _____

University of Rochester

Proposed Change of Pay Distribution

Confidential

Date Prepared: 02/07/2017
 Emplid: 201069 0 Paygroup: SMO
 Name: Red, Rhonda
 Dept: 100100 Purchasing
 Jobcode: 0565 Purchasing Asst
 Date Range: 07/01/2016 - 08/31/2016

* * * * * S A L A R Y & B E N R A T E I N F O * * * * *

C U R R E N T A L L O C A T I O N 07/01/2016 - 08/31/2016

C CURRENT Earnings DETAIL between 07/01/2016 and 08/31/2016

<u>FAO</u>	<u>Description</u>	<u>Earnings</u>	<u>Pct</u>	<u>Ben Amt</u>	<u>Realloc?</u>	<u>Pay End Dt</u>	<u>HHS</u>	<u>Seq</u>
OP231528	Program Management -	\$1,478.53	100.00%	\$473.13		07/15/2016		
OP231528	Program Management -	\$1,478.53	100.00%	\$473.13		07/31/2016		
OP231528	Program Management -	\$1,478.53	100.00%	\$473.13		08/15/2016		
OP231528	Program Management -	\$1,478.53	100.00%	\$473.13		08/31/2016		
	TOTAL	\$5,914.12		\$1,892.52				

P R O P O S E D A L L O C A T I O N 07/01/2016 - 08/31/2016

PROPOSED Account Code distribution with Dollars

<u>FAO</u>	<u>Pct</u>	<u>Amount</u>	<u>HHS</u>	<u>Seq</u>	<u>Description</u>	<u>Responsible Person</u>
OP134514	50.00%	\$2,957.06			NS 3-3400	
OP134570	50.00%	\$2,957.06			NS 3-1800	
	TOTAL 100.00%	\$5,914.12				

University of Rochester

Proposed Change of Pay Distribution

Confidential

Date Prepared: 02/07/2017

Emplid: 201069 0

Paygroup: SMO

Name: Red, Rhonda

Dept: 100100 Purchasing

Jobcode: 0565 Purchasing Asst

Date Range: 07/01/2016 - 08/31/2016

* * * * *			N E T E F F E C T			* * * * *		
<u>DETAIL Net Effect</u>			Salary			Ben Rate		
<u>Pay End Dt</u>	<u>FAO</u>	<u>Pct</u>	<u>Old Amt</u>	<u>New Amt</u>	<u>Net Chg</u>	<u>Old Amt</u>	<u>New Amt</u>	<u>Net Chg</u>
07/15/2016	OP134570	50%	\$0.00	\$739.27	\$739.27	\$0.00	\$236.56	\$236.56
	OP134514	50%	\$0.00	\$739.26	\$739.26	\$0.00	\$236.57	\$236.57
	OP231528	0%	\$1,478.53	\$0.00	\$-1,478.53	\$473.13	\$0.00	\$ -473.13
07/15/2016		100%	\$1,478.53	\$1,478.53		\$473.13	\$473.13	
07/31/2016	OP134570	50%	\$0.00	\$739.27	\$739.27	\$0.00	\$236.56	\$236.56
	OP134514	50%	\$0.00	\$739.26	\$739.26	\$0.00	\$236.57	\$236.57
	OP231528	0%	\$1,478.53	\$0.00	\$-1,478.53	\$473.13	\$0.00	\$ -473.13
07/31/2016		100%	\$1,478.53	\$1,478.53		\$473.13	\$473.13	
08/15/2016	OP134570	50%	\$0.00	\$739.27	\$739.27	\$0.00	\$236.56	\$236.56
	OP134514	50%	\$0.00	\$739.26	\$739.26	\$0.00	\$236.57	\$236.57
	OP231528	0%	\$1,478.53	\$0.00	\$-1,478.53	\$473.13	\$0.00	\$ -473.13
08/15/2016		100%	\$1,478.53	\$1,478.53		\$473.13	\$473.13	
08/31/2016	OP134570	50%	\$0.00	\$739.27	\$739.27	\$0.00	\$236.56	\$236.56
	OP134514	50%	\$0.00	\$739.26	\$739.26	\$0.00	\$236.57	\$236.57
	OP231528	0%	\$1,478.53	\$0.00	\$-1,478.53	\$473.13	\$0.00	\$ -473.13
08/31/2016		100%	\$1,478.53	\$1,478.53		\$473.13	\$473.13	
<u>SUMMARY Net Effect</u>			Salary			Ben Rate		
	<u>FAO</u>	<u>Pct</u>	<u>Old Amt</u>	<u>New Amt</u>	<u>Net Chg</u>	<u>Old Amt</u>	<u>New Amt</u>	<u>Net Chg</u>
	OP134570	50%	\$0.00	\$2,957.08	\$2,957.08	\$0.00	\$946.24	\$946.24
	OP134514	50%	\$0.00	\$2,957.04	\$2,957.04	\$0.00	\$946.28	\$946.28
	OP231528	0%	\$5,914.12	\$0.00	\$-5,914.12	\$1,892.52	\$0.00	\$-1,892.52
	TOTAL	100%	\$5,914.12	\$5,914.12		\$1,892.52	\$1,892.52	

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H R M S A L L O C A T I O N

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University of Rochester
Proposed Change of Pay Distribution

Confidential

Date Prepared: 02/07/2017
Emplid: 201069 0 Paygroup: SMO
Name: Red, Rhonda
Dept: 100100 Purchasing
Jobcode: 0565 Purchasing Asst
Date Range: 07/01/2016 - 08/31/2016

Default Distribution, last changed on 12/14/2014

FAO		HHS Data	
OP134570	100%		NS 3-1800
TOTAL		100.00%	

If the data above is incorrect, submit a Personnel Action Form to the HR Service Center.

Appendix B — Reallocating a Reallocation

University of Rochester
Proposed Change of Pay Distribution

Confidential

Date Prepared: 02/07/2017
Emplid: 201069 0 Paygroup: BWH
Name: Red, Rhonda
Dept: 100100 Purchasing
Jobcode: 0565 Purchasing Asst
Date Range: 07/03/2011 - 07/16/2011

This is a reallocation only

Distribution prior to 07/03/2011 (Pay End Date: 07/02/2011)

FAO	HHS Data	
OP134570	100.00%	NS 3-1800
TOTAL 100.00%		

I certify that the pay distribution above is a reasonable reflection of effort devoted during the period prior to the effective date of this proposed change,
and the proposed distribution below is a reasonable estimate of effort for the period indicated.

Signature: _____ Date: _____

Proposed Distribution 07/03/2011 - 07/16/2011

<u>FAO</u>	<u>Pct</u>	<u>HHS</u>	<u>Seq Description</u>	<u>Responsible Person</u>
OP134570	100.00%		NS 3-1800	
TOTAL 100.00%				

FAOs outside your department require additional signatures.

Prepared by: Blue, Bonnie bonnie_blue@urmc.rochester.edu 275.1234 Box 654

Justification for Payroll Cost Transfer:

Wrong accounts charged

Recommending Officer: _____ Date: _____

Recommending Officer: _____ Date: _____

University of Rochester

Proposed Change of Pay Distribution

Confidential

Date Prepared: 02/07/2017

Emplid: 201069 0

Paygroup: BWH

Name: Red, Rhonda

Dept: 100100 Purchasing

Jobcode: 0565 Purchasing Asst

Date Range: 07/03/2011 - 07/16/2011

* * * * * S A L A R Y & B E N R A T E I N F O * * * * *

C U R R E N T A L L O C A T I O N 07/03/2011 - 07/16/2011

CURRENT Earnings SUMMARY between 07/03/2011 and 07/16/2011

<u>FAO</u>	<u>Description</u>	<u>Earnings</u>	<u>Ben Amt</u>	<u>Seq</u>
OP134570	NS 3-1800	\$401.33	\$39.73	
OP211008	Arts and Science Computin	\$401.34	\$39.73	
TOTAL		\$802.67	\$79.46	

CURRENT Earnings DETAIL between 07/03/2011 and 07/16/2011

<u>FAO</u>	<u>Description</u>	<u>Earnings</u>	<u>Pct</u>	<u>Ben Amt</u>	<u>Realloc?</u>	<u>Pay End Dt</u>	<u>HHS</u>	<u>Seq</u>
OP134570	NS 3-1800	\$802.67	100.00%	\$79.46		07/16/2011		
OP134570	NS 3-1800	\$ -802.67	100.00%	\$-79.46	-	07/16/2011		07/16/2011
OP134570	NS 3-1800	\$401.33	50.00%	\$39.73	+	07/16/2011		07/16/2011
OP211008	Arts and Science Com	\$401.34	50.00%	\$39.73	+	07/16/2011		07/16/2011
TOTAL		\$802.67		\$79.46				

P R O P O S E D A L L O C A T I O N 07/03/2011 - 07/16/2011

PROPOSED Distribution with Dollars

<u>FAO</u>	<u>Pct</u>	<u>Amount</u>	<u>HHS</u>	<u>Seq</u>	<u>Acct Description</u>	<u>Responsible Person</u>
OP134570	100.00%	\$802.67			NS 3-1800	
TOTAL	100.00%	\$802.67				

University of Rochester

Proposed Change of Pay Distribution

Confidential

Date Prepared: 02/07/2017

Emplid: 201069 0

Paygroup: BWH

Name: Red, Rhonda

Dept: 100100 Purchasing

Jobcode: 0565 Purchasing Asst

Date Range: 07/03/2011 - 07/16/2011

* * * * *			N E T E F F E C T			* * * * *		
<u>DETAIL Net Effect</u>			Salary			Ben Rate		
<u>Pay End Dt</u>	<u>FAO</u>	<u>Pct</u>	<u>Old Amt</u>	<u>New Amt</u>	<u>Net Chg</u>	<u>Old Amt</u>	<u>New Amt</u>	<u>Net Chg</u>
07/16/2011	OP134570	100%	\$401.33	\$802.67	\$401.34	\$39.73	\$79.46	\$39.73
	OP211008	0%	\$401.33	\$0.00	\$ -401.34	\$39.73	\$0.00	\$-39.73
07/16/2011		100%	\$802.67	\$802.67		\$79.46	\$79.46	
<u>SUMMARY Net Effect</u>			Salary			Ben Rate		
	<u>FAO</u>	<u>Pct</u>	<u>Old Amt</u>	<u>New Amt</u>	<u>Net Chg</u>	<u>Old Amt</u>	<u>New Amt</u>	<u>Net Chg</u>
	OP134570	100%	\$401.33	\$802.67	\$401.34	\$39.73	\$79.46	\$39.73
	OP134570	0%	\$401.34	\$0.00	\$-401.34	\$39.73	\$0.00	\$-39.73
	TOTAL	100%	\$802.67	\$802.67		\$79.46	\$79.46	

University of Rochester
Proposed Change of Pay Distribution

Confidential

Date Prepared: 02/07/2017
Emplid: 201069 0 Paygroup: BWH
Name: Red, Rhonda
Dept: 100100 Purchasing
Jobcode: 0565 Purchasing Asst
Date Range: 07/03/2011 - 07/16/2011

* * * * *

H R M S A L L O C A T I O N

* * * * *

Default Distribution, last changed on 12/14/2014

FAO	HHS Data	
OP134570	100%	NS 3-1800
TOTAL 100.00%		

If the data above is incorrect, submit a Personnel Action Form to the HR Service Center.

Appendix C —

Salary Cap

University of Rochester

Proposed Change of Pay Distribution

Date Prepared: 02/07/2017
 Emplid: 201065 0 Paygroup: MTH
 Name: Doctor, Roger
 Dept: 400123 Radiation Oncology M&D
 Jobcode: 0042 Research Professor
 Date Range: 08/01/2016 - 08/31/2016

This is a reallocation only

Distribution prior to 08/01/2016 (Pay End Date: 07/31/2016)

FAO		HHS	Data	
GF450321	21.00%			Pediatric Resch Fund
OP137513	19.00%			Outpatient Pediatrics
GR528905	15.07%		1	GR528905 5R01HL079954-07
OP349769	4.93%	H	1	General Pediatric
GR525896	15.07%		2	GR525896 1R18HL116244-01A
OP349769	4.93%	H	2	General Pediatric
GR503493	15.07%		3	
OP349769	4.93%	H	3	General Pediatric
TOTAL 100.00%				

I certify that the pay distribution above is a reasonable reflection of effort devoted during the period prior to the effective date of this proposed change, and the proposed distribution below is a reasonable estimate of effort for the period indicated.

Signature: _____ Date: _____

Proposed Distribution 08/01/2016 - 08/31/2016

<u>FAO</u>	<u>Pct</u>	<u>HHS</u>	<u>Seq</u>	<u>Description</u>	<u>Responsible Person</u>
GF450321	21.00%			Pediatric Resch Fund	
OP137513	20.00%			Outpatient Pediatric	
OP211409	10.00%			Pediatrics	
OP349769	19.00%			General Pediatric	
GR525896	14.78%		1	GR525896 1R18HL11624	Jill Suzanne Halterm
OP137513	5.22%	H	1	Outpatient Pediatric	
GR528905	7.39%		2	GR528905 5R01HL07995	Jill Suzanne Halterm
OP137513	2.61%	H	2	Outpatient Pediatric	
TOTAL 100.00%					

FAOs outside your department require additional signatures.

Prepared by: Blue, Bonnie bonnie_blue@urmc.rochester.edu 275.1234 Box 654

Justification for Payroll Cost Transfer:

Wrong FAO used for non GR FAO.

Recommending Officer: _____ Date: _____

Recommending Officer: _____ Date: _____

University of Rochester

Proposed Change of Pay Distribution

Confidential

Date Prepared: 02/07/2017
 Emplid: 201065 0 Paygroup: MTH
 Name: Doctor, Roger
 Dept: 400123 Radiation Oncology M&D
 Jobcode: 0042 Research Professor
 Date Range: 08/01/2016 - 08/31/2016

* * * * * S A L A R Y & B E N R A T E I N F O * * * * *

C U R R E N T A L L O C A T I O N 08/01/2016 - 08/31/2016

CURRENT Earnings SUMMARY between 08/01/2016 and 08/31/2016

<u>FAO</u>	<u>Description</u>	<u>Earnings</u>	<u>Ben Amt</u>	
GF450321	Pediatric Resch Fund	\$4,298.34	\$756.51	
OP137513	Outpatient Pediatrics	\$3,888.98	\$684.46	
GR528905	GR528905 5R01HL079954-07	\$3,084.58	\$542.89	1
OP349769	General Pediatric	\$1,009.09	\$177.60	1
GR525896	GR525896 1R18HL116244-01A	\$3,084.58	\$542.89	2
OP349769	General Pediatric	\$1,009.09	\$177.60	2
GR503493		\$3,084.58	\$542.89	3
OP349769	General Pediatric	\$1,009.09	\$177.60	3
TOTAL		\$20,468.33	\$3,602.44	

CURRENT Earnings DETAIL since 07/01/2005

<u>FAO</u>	<u>Description</u>	<u>Earnings</u>	<u>Pct</u>	<u>Ben Amt</u>	<u>Realloc?</u>	<u>Pay End Dt</u>	<u>HHS</u>	<u>Seq</u>
GF450321	Pediatric Resch Fund	\$4,298.34	21.00%	\$756.51		08/31/2016		
OP137513	Outpatient Pediatric	\$3,888.98	19.00%	\$684.46		08/31/2016		
GR525896	GR525896 1R18HL11624	\$3,084.58	15.07%	\$542.59		08/31/2016		
OP349769	General Pediatric	\$1,009.09	4.93%	\$177.60		08/31/2016		
GR503493		\$3,084.58	15.07%	\$542.89		08/31/2016		
OP349769	General Pediatric	\$1,009.09	4.93%	\$177.60		08/31/2016		
GR528905	GR528905 5R01HL07995	\$3,084.58	15.07%	\$542.89		08/31/2016	Y	1
OP349769	General Pediatric	\$1,009.09	4.93%	\$177.60		07/31/2005	Y	1
TOTAL		\$20,468.33		\$3,602.44				

P R O P O S E D A L L O C A T I O N 08/01/2016 - 08/31/2016

PROPOSED Account Code distribution with Dollars

<u>FAO</u>	<u>Pct</u>	<u>Amount</u>	<u>HHS</u>	<u>Seq</u>	<u>Acct Description</u>	<u>Responsible Person</u>
GF450321	21.00%	\$4,298.35			Pediatric Resch Fund	
OP137513	20.00%	\$4,093.67			Outpatient Pediatric	
OP211409	10.00%	\$2,046.83			Pediatrics	
OP349769	19.00%	\$3,888.98			General Pediatric	
GR525896	14.78%	\$3,025.22		1	GR525896 1R18HL11624	Jill Suzanne Halterm
OP137513	5.22%	\$1,068.45	Y	1	Outpatient Pediatric	
GR528905	7.39%	\$1,512.61		2	GR528905 5R01HL07995	
OP137513	2.61%	\$534.22	Y	2	Outpatient Pediatric	Jill Suzanne Halterm
TOTAL	100.00%	\$20,468.33				

University of Rochester

Proposed Change of Pay Distribution

Confidential

Date Prepared: 02/07/2017

Emplid: 201065 0

Paygroup: MTH

Name: Doctor, Roger

Dept: 400123 Radiation Oncology M&D

Jobcode: 0042 Research Professor

Date Range: 08/01/2016 - 08/31/2016

* * * * *			N E T		E F F E C T		* * * * *		
DETAIL Net Effect			Salary				Ben Rate		
Pay End Dt	FAO	Pct	Old Amt	New Amt	Net Chg	Old Amt	New Amt	Net Chg	
08/31/2016	OP137513	27.83%	\$3,888.98	\$5,696.33	\$1,807.35	\$684.46	\$1,002.55	\$318.09	
	GF450321	21%	\$4,298.34	\$4,298.34	\$0.00	\$756.51	\$756.51	\$0.00	
	OP349769	19%	\$3,027.27	\$3,889.00	\$861.73	\$532.80	\$684.48	\$151.68	
	GR525896	14.78%	\$3,084.58	\$3,025.22	\$-59.36	\$542.89	\$532.44	\$-10.45	
	OP211409	10%	\$0.00	\$2,046.83	\$2,046.83	\$0.00	\$360.24	\$360.24	
	GR528905	7.39%	\$3,084.58	\$1,512.61	\$-1,571.97	\$542.89	\$266.22	\$-276.67	
	GR503493	0%	\$3,084.58	\$0.00	\$-3,084.58	\$542.89	\$0.00	\$-542.89	
08/31/2016		100%	\$20,468.33	\$20,468.33		\$3,602.44	\$3,602.44		
SUMMARY Net Effect			Salary				Ben Rate		
	FAO	Pct	Old Amt	New Amt	Net Chg	Old Amt	New Amt	Net Chg	
	OP137513	27.83%	\$3,888.98	\$5,696.33	\$1,807.35	\$684.46	\$1,002.55	\$318.09	
	GF450321	21%	\$4,298.34	\$4,298.34	\$0.00	\$756.51	\$756.51	\$0.00	
	OP349769	19%	\$3,027.27	\$3,889.00	\$861.73	\$532.80	\$684.48	\$151.68	
	GR525896	14.78%	\$3,084.58	\$3,025.22	\$-59.36	\$542.89	\$532.44	\$-10.45	
	OP211409	10%	\$0.00	\$2,046.83	\$2,046.83	\$0.00	\$360.24	\$360.24	
	GR528905	7.39%	\$3,084.58	\$1,512.61	\$-1,571.97	\$542.89	\$266.22	\$-276.67	
	GR503493	0%	\$3,084.58	\$0.00	\$-3,084.58	\$542.89	\$0.00	\$-542.89	
	TOTAL	100%	\$20,468.33	\$20,468.33		\$3,602.44	\$3,602.44		

University of Rochester
Proposed Change of Pay Distribution

Confidential

Date Prepared: 02/07/2017
Emplid: 201065 0 Paygroup: MTH
Name: Doctor, Roger
Dept: 400123 Radiation Oncology M&D
Jobcode: 0042 Research Professor
Date Range: 08/01/2016 - 08/31/2016

* * * * *

H R M S A L L O C A T I O N

* * * * *

Default Distribution, last changed on 01/01/2015

FAO		HHS Data	
OP348446	100%	N	Directors Discretion
TOTAL 100.00%			

If the data above is incorrect, select the 'prospective' checkbox.

University of Rochester
Proposed Change of Pay Distribution

Confidential

Date Prepared: 09/30/2005 **HHS SALARY CAP REALLOCATION CALCULATION**
 Emplid: 500005 0
 Name: Doctor, Dale
 Dept: 400123 Radiation Oncology M&D
 Jobcode: 0001 Professor

Ledger 5: **GR525896** Seq #: 1

Salary: \$245,620.00

Percentage of effort charged to this award: 20.00%

Resulting Dollars from this percent: \$49,124.00

Capped Salary Dollars: \$181,500.00

FY2012 179,700
 FY2014 181,500
 FY2016 183,300 or 185,100
 Jan 20 183,300
 Oct 20 181,500
 PCORI 200,000

Applicable percentage of effort: 20.00%

Allowable dollars at this level: \$36,300.00 14.78% **GR525896**

Difference at this level: \$12,824.00 5.22% **OP137513**

Information provided by: Blue, Bonnie Date Prepared: 02/07/2017

University of Rochester
Proposed Change of Pay Distribution

Confidential

Date Prepared: 09/30/2005 **HHS SALARY CAP REALLOCATION CALCULATION**

Emplid: **500005** **0**

Name: **Doctor, Dale**

Dept: 400123 Radiation Oncology M&D

Jobcode: 0001 Professor

Ledger 5: **GR528905** Seq #: 2

Salary: \$245,620.00

Percentage of effort charged to this award: 10.00%

Resulting Dollars from this percent: \$24,562.00

Capped Salary Dollars: \$181,500.00

FY2012 179,700

FY2014 181,500

FY2016 183,300 or 185,100

Jan 20 183,300

Oct 20 181,500

PCORI 200,000

Applicable percentage of effort: 10.00%

Allowable dollars at this level: \$18,150.00 7.39% **GR528905**

Difference at this level: \$6,412.00 2.61% **OP137513**

Information provided by: Blue, Bonnie Date Prepared: 02/07/2017