User's Guide to Plan Confirmation System Review

Office of Research Accounting and Costing Standards
Human Resources Management Systems
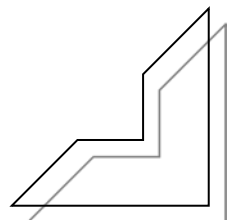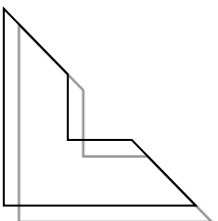**(revised September 2015)**

Table of Contents

Plan Confirmation System Review (PCSR)

Introduction

The purpose of the Plan Confirmation System Review is to test the system to ensure an independent evaluation of the system's integrity and to be compliant with federal guidelines. The administrator will review and compare the Planned effort distributions to the Actual allocations that were processed. When necessary, the administrator will process corrections. Once the review is complete, the reviewer will sign off confirming the reasonableness of the distribution of effort. For individuals where the reviewer does not have suitable means of effort verification, he/she must verify actual devoted effort with the appropriate individuals (the employees, supervisors, or Principal Investigators) to determine whether effort reallocations may be necessary.

The HRMS Plan Confirmation System Review (PCSR) program allows users electronic access to review, process necessary changes, and approve effort distributions. This replaces the paper Plan Confirmation System Review reports. The PCSR program will indicate each individual's **Planned Distribution**, as well as the **Actual Distribution** for the reporting period chosen (final pay period of September).

Please contact the Office of Research Accounting and Costing Standards x5-8835 with any questions related to the process/program.

How to Find an Individual

Search

To access Departmental Records for those individuals under review:
1. Select 'Main Menu'
2. Select 'UR Reports and Interfaces'
3. Select 'Labor Distribution'
4. Select 'PCSR'
5. Select 'PCSR – Current Year'

[sample screen: User Review – Plan Confirmation]

6. Select Search
   a. By clicking **Search** up to 300 rows of data will be returned.
      i. The Search Results will display at the bottom of the screen.
      ii. To Sort, click on the column header in the search results (sort order default is by *"Name"*: Last, First).
   b. Departments with more than 300 individuals will need to limit the selection by filtering on any of the fields (*see **Field Values** table on p4*).
   c. Select **Clear** if needed to revise the previous selection criteria.

Field Values

Field Name	Entry Value	Notes
Name	Employee last name	Defaults to "begins with"
Empl ID	Employee ID	Defaults to "begins with"
Department	HR Department Number on PAF	Defaults to "begins with"
Sign off for this employee? *See **Field Definitions** table on p15.*	Not Signed Off Yet Override was used –OKAY Reallocation Pending –OKAY Reallocation processed –OKAY Sign off –OKAY Terminated –OKAY	Selection can be made from a drop down list of values.
Job Group	Faculty, PAS Staff, etc.	Selection can be made from a drop down list of values.
Coded Distribution *See **Field Definitions** table below.*	1 – Faculty 100% Spons Effort 2 – Admin Sponsored Effort No	Selection can be made from a drop down list of values. These codes are system generated based on position code and/or pay grade.
Sponsored? *See **Field Definitions** table below.*	No Yes	Selection can be made from a drop down list of values.
Planned same as Actual *See **Field Definitions** table below.*	Planned different than Actual Planned same as Actual	Selection can be made from a drop down list of values.

Field Definitions

Field Name	Term	Definition
Coded Distribution	1-Faculty 100% Spons Effort	This indicates the individual has 100% Planned effort distributed to sponsored project(s). This code applies to specific faculty job codes.
Coded Distribution	2-Admin Sponsored Effort	This indicates the individual has a portion of Planned effort distribution to sponsored project(s). This code applies to specific administrative and clerical job codes.
Coded Distribution	No	This indicates the Planned effort distribution does not meet the criteria for Coded Distributions 1 or 2.
Sponsored?	No	Individuals with no Planned effort distribution from a sponsored FAO(s).
Sponsored?	Yes	Individuals with Planned effort distribution from a sponsored FAO(s).
Planned same as Actual?	Planned different than Actual	At the time of the review, the Planned Distribution differs from Actual Distribution, due to a Reallocation or Paycheck Override.
Planned same as Actual?	Planned same as Actual	At the time of the review, the Planned Distribution of effort equals the Actual Distribution of effort.

How to Select an Individual

Select

To select an individual for review, in the **Search Results** section, click on the *"Name"* of the individual. This will bring up the screen to review the record for the individual (Plan Confirmation Review tab).

[sample screen: User Review-Plan Confirmation Search Results]

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Office of Research Accounting and Costing Standards

How to Access the Screen to Review an Individual

Plan Confirmation Review

The **Plan Confirmation Review** section of the review screen displays fields relating to the individual.

[sample screen: Plan Confirmation Review Tab]

The charts in the Appendix can be used to understand the Workflow for the review process (see pages 20 through 22).

Display Fields

Field Name	Display Value	Notes
Confirming Distribution As Of	09/30/20YY	PCSR period
Name	First, Middle, Last	
Emplid	Emplid and Empl Record Number	
Department	HR department number and description	
Job Code	Job code and description	As assigned on the active PAF
Multiple Job Employee?	Checked or unchecked	The box will be checked if the individual has multiple jobs
Job Group	e.g. Faculty, PAS Staff, Students	Grouping based on job codes
Coded Distribution	No 1-Faculty 100% Spons Effort 2-Admin Sponsored Effort	See Coded Distribution in **Field Definitions** on p4
Current Status	Active, Leave, etc.	Displays employee status

Planned Distribution as of Confirmation date above

The PCSR includes both the Planned and Actual Distributions. The **Planned Distribution as of Confirmation date above** section displays the Planned Distribution data for the selected individual, as recorded on the active Personnel Action Form (500/510, 600/610) as of the **Confirming Distribution As Of** date (i.e. September 30,20YY).

[sample screen: Planned Distribution as of Confirmation date above]

Display Fields

Field Name	Display Value	Notes
	#	Each source is numbered
FAO (Acct)	FAO	FAO (Acct) for each distribution
Percent	###.##	Effort Distribution in percentage terms
Description	FAO Description	
Cost Center	Cost Center	Cost Center assigned to each FAO
PI	Name	Indicates the PI for each sponsored FAO
Sponsor	Sponsor Category	Displays for sponsored FAOs
Fed Acct?	Y N	Will display "Y" if FAO is coded as federal or federal flow through
Cost Sharing	HHS Cap Other Or Blank	Will display "HHS Cap" or "Other" if an HHS salary cap or other cost sharing has been related to this FAO distribution. Field will be blank if no cost sharing distribution has been assigned
Seq	# or Blank	Indicates Cost Sharing sequence number, if applicable
*Comments for Code 2 *See **Administrative Effort – Code 2 Distribution** on p10.*	Default blank	This field will only display for individuals meeting the Coded Distribution of "2-Admin Sponsored Effort" criteria

Administrative Effort – Code 2 Distribution

The system generates a Coded Distribution of *"2-Admin Sponsored Effort"* based on Planned Distribution and displays an additional data field titled *"*Comments for Code 2"*. This field only appears when an individual with a *"Job Code"* classified as administrative/clerical has a Planned effort distribution on a sponsored award FAO. For each record related to a Code 2 Distribution, comments are <u>required</u> to ensure the administrative effort expended was budgeted and approved by the sponsor, or otherwise allowable as a direct expense to the award. A selection must be made in the *"*Comments for Code 2"* field in order to save the record.

Field Definitions

Field Name	Term	Definition
* Comments for Code 2	Federal-Budg/Apprv by Sponsor	This selection indicates the reviewer has confirmed this individual's administrative effort was budgeted and approved by the federal award sponsoring agency
* Comments for Code 2	Nonfederal-Approved by Sponsor	This selection indicates the reviewer has confirmed this individual's administrative effort was approved by the nonfederal award sponsoring agency
* Comments for Code 2	Other – Comment required below	This selection allows the reviewer to provide a non-standard freeform description for the individual's administrative effort. When this is selected, additional information must be entered in the *"Comment"* field in **Review – Sign Off** section

Actual Distribution

This section displays the **Actual Distribution** for the individual as of the date the review is occurring.

[sample screen: Actual Distribution]

The data fields in this section are similar to the fields in the **Planned Distribution as of Confirmation date** section described above. <u>Additional fields</u> display in the **Actual Distribution** section providing detail related to the paycheck data. If payroll Reallocations are submitted and processed during the PCSR period, then this data is systematically updated to display those changes.

If an individual has a "Time as Reported" classification and did not perform any effort in the "Confirming Distribution As Of" date/period, the individual will not display in the review population.

Display Fields

Field Name	Display Value	Notes
Distribution Source *See **Field Definitions** table below.*	Default acct data Reallocated Paycheck Override Suspense	Provides an indication of whether the Actual Distribution differs from the Planned Distribution System generated value based on Planned Distribution compared to Actual Distribution
Pay Begin	mm/dd/yy	PCSR period start date of the individual's distribution
Pay End	mm/dd/yy	PCSR period end date of the individual's distribution
Realloc Dt	mm/dd/yy	System generated Reallocation date

Field Definitions

Field Name	Term	Definition
Distribution Source	Default acct data	No changes have been processed to the Planned effort for this individual. The individual was paid as Planned for this period.
Distribution Source	Reallocated	An effort Reallocation has been processed in HRMS for this individual. The Actual Distribution section displays the modified distribution of the individual's effort for the PCSR period.
Distribution Source	Paycheck Override	The Paycheck Override function in HRMS was used to redistribute the individual's effort from the Planned Distribution for this period. The Actual Distribution data section displays the modified distribution of the individual's effort.
Distribution Source	Suspense	This indicates an individual's Actual Distribution was allocated to an invalid FAO, causing the allocation to go to Suspense. A correction needs to be made to process the effort to the appropriate FAO(s).

Review – Sign Off

The **Review – Sign Off** section contains fields the user will need to update with the information necessary to complete the review process for the individual.

[sample screen: Review - Sign Off]

Plan Confirmation Review

Confirming Distribution As Of: 09/30/2015

Name: Penny Counter   Job Group: Faculty

Emplid: 456789   0   Coded Distribution: No

Department: 400020   Academic Dept   Current Status   Active

Job Code: 0005   Asst Professor

☐ Multiple Job Employee?

Planned Distribution as of Confirmation date above   Personalize | Find | 🗗 | 📇   First ◀ 1 of 1 ▶ Last

	FAO (Acct)	Pct	Description	Cost Center	PI	Sponsor	Fed Acct?	Cost Sharing	Seq
1	OP347361	100.00	Operating	CC11406-000			N		

Actual Distribution   Personalize | Find | 🗗 | 📇   First ◀ 1 of 1 ▶ Last

	FAO (Acct)	Pct	Description	Cost Center	PI	Sponsor	Fed Acct?	Cost Sharing	Seq	Distribution Source	Pay Begin	Pay End	Realloc Dt
1	OP237549	100.00	Operating	CC11406-000			N			Reallocated	09/01/15	09/30/15	10/12/2015

Review - Sign Off

☐ Planned same as Actual?

* Sign off for this employee?: Not Signed off yet ▼   Date: User:

Comment:

🖫 Save   🔍 Return to Search   ⬆️ Previous in List   ⬇️ Next in List

Data Entry Fields

Field Name	Value	Notes
Planned same as Actual	Checked or unchecked (system generated)	Checked if no effort distribution changes were processed; unchecked if the distributions differ
*Sign off for this employee?	Not Signed off yet Override was used –OKAY Reallocation Pending – OKAY Reallocation processed – OKAY Sign Off – OKAY Terminated – OKAY	Select appropriate drop-down value for each individual See **Field Definitions** on p15 Default is "*Not Signed off yet*"
Date	mm/dd/yy	Populates with the date and time when the record is saved
User	Last, First, Middle	Populates with the reviewer's name when the record is saved
Comment *See Administrative Effort – Code 2 Distribution on p10.* *See Comment under Review Sign-Off Process on p16.*	Alpha Numeric	This is a free form field where the reviewer can enter required comments and/or where other comments can be entered for departmental use **Required Comment for Code 2 Distribution:** If "*Other-Comment required below*" was selected in the "**Comments for Code 2*" field **Required Comment for Code 1 Distribution:** A comment is always required

Field Definitions

Field Name	Term	Definition
*Sign off for this employee?	Not Signed off yet	Planned and Actual Distributions for the selected individual are not yet reviewed or still under review
*Sign off for this employee?	Override was used – OKAY	Select this option when the Planned Distribution differs from Actual Distribution, but Actual Distribution is correct because a Paycheck Override was processed
*Sign off for this employee?	Reallocation Pending – OKAY	Select this option when the Actual Distribution is not correct and a Payroll Reallocation (800 Form) has been or will be submitted, but has not been processed in HRMS This selection requires a *"Comment"* be entered in the **Review - Sign Off Process** section (see page 16)
*Sign off for this employee?	Reallocation processed – OKAY	Select this option when Actual Distribution is correct, but Planned Distribution for the selected individual differs from Actual Distribution because a Payroll Reallocation was processed in HRMS
*Sign off for this employee?	Sign off – OKAY	Select this option when Planned and Actual Distributions for the selected individual are the same and reflect the most accurate information
*Sign off for this employee?	Terminated – OKAY	Select this option only when the selected individual has been terminated and did not perform effort in the September PCSR period Reviewer can use the *"Comment"* field to provide clarification
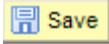
Review Sign-Off Process

An individual who is in a position to verify the accuracy of the effort distributions (i.e. has first-hand knowledge or other means of verification) may perform the review and sign off for each individual. The reviewer is required to compare the **Planned Distribution** to the **Actual Distribution** that was processed in HRMS, and to "Sign Off" on the reasonableness of the Actual Distribution of effort. When necessary, the reviewer may need to process effort reallocations to correct the distribution.

1. Compare **Planned Distribution** to **Actual Distribution**.
2. Select the appropriate "*Sign off for this Employee*" option based on each individual circumstance (*see **Field Definitions** table on p12*).
3. Use the *"Comment"* field to enter <u>required</u> information, or as a free form field to enter data for departmental records. This field can be used to indicate any relevant information about the individual.

> *There are additional steps <u>required</u> for: Code 1 Distributions, Code 2 Distributions (if "Other- Comment required below" was selected), or for "Sign off for this employee?" (if "Reallocation Pending-OKAY" was selected).*

    a. **Code 1**: The required *"Comment"* should clearly state the individual performed no other institutional effort activity during the PCSR period.
        i. If other institutional effort was performed, then a Reallocation must be processed.
        ii. Caution: if **Actual Distribution** differs from **Planned Distribution** and results in Code 1 Distribution, then provide appropriate *"Comment"*. This will not be a system generated indicator.
    b. **Code 2**: if *"Other – Comment required below"* is selected in the "*Comments for Code 2*" field, then the *"Comment"* should contain appropriate information related to the administrative effort.
        i. Caution: if **Actual Distribution** differs from **Planned Distribution** and results in Code 2 Distribution, then provide appropriate *"Comment"*. This will not be a system generated indicator.
    c. If *"Reallocation Pending-Okay"* was selected in the *"Sign off for this employee?"* field, then the *"Comment"* must include the date the Reallocation was prepared, documentation of the corrected distribution FAOs and percentages and any other relevant information.
4. Once the review is complete and the criteria are selected for an individual, click the [Save] button.
5. To select the next individual for review, click one of the following options:
[Return to Search] [Previous in List] [Next in List]
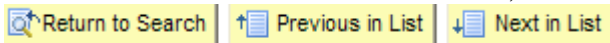
Reports

PCSR Report

The **PCSR Report** allows departments/cost centers to export the data detailed in the PCSR screens to Microsoft Excel. The report is a summary of specific data for each individual in the HR Department. Exporting the report to Microsoft Excel provides the ability to sort, add notes, distribute as appropriate, and save for the data for departmental records. The report can be run before any data entry is performed for the PCSR period, during and after the review period. If the user would like to retain the reports, they must save each version on their computer or network drive. Every time a change is made to the PCSR screens/data, the report will need to be rerun to maintain those changes in the Microsoft Excel spreadsheet.

To run the PCSR Report for departmental records:

1. Select 'Main Menu'
1. Select 'UR Reports and Interfaces'
2. Select 'Labor Distribution'
3. Select 'PCSR'
4. Select 'PCSR Report'

[sample screen: PCSR User Report]

5. Enter "Run Control ID"
6. Select **Search**
7. Select **Run** (all appropriate records will be returned, based on a reviewer's access)
   a. To limit report by HR department, enter/select HR Department(s)
   b. The default sort order is by Department, Name, Account
8. The *"Select"* check box will display for **PCSR Report UPY6024**;

9. Select **OK**
10. Select Process Monitor
11. Select **Refresh**

12. When **Run Status** is "Success", Click "Details*"*

Run Status	Distribution Status	Details
Success	Posted	Details

13. Click View Log/Trace
14. Click UPY 6024 #######.csv to open the report
15. Select Open> File> Save As and Rename (name the file something that makes sense)

[sample screen: PCSR Report]

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y
1	Report Period	Dept	Dept description	Name	Emplid	Coded Distribution	Current Status	Job Group	Jobcode	Jobcode description	Multiple Job Employee	Plan vs Actual	FAO (Acct)	Pct	Description	PI	Cost Center	Sponsor	Fed Acct?	Se q	Signoff	User	Date	Comment for Code 2	Comment
2	9/30/2015	4000XX	Academic Dept	Jane Doe	123456/ 0	0-No	Active	Professional & Exec Non-Grade	0080	Instructor of Clinical	N	PLANNED	OP349XXX	100	OP3 FAO		CC2XXXX-000		N	0	Not Signed off yet				
3	9/30/2015	4000XX	Academic Dept	Jane Doe	123456/ 0	0-No	Active	Professional & Exec Non-Grade	0080	Instructor of Clinical	N	ACTUAL	GF621XXX	100	GF6 FAO		CC2XXXX-000		N	0	Not Signed off yet				
4	9/30/2015	4000XX	Academic Dept	John Smith	234567/ 0	0-No	Active	PAS Staff	8752	Technical Assoc I (S)	N		GF450XXX	100	GF4 FAO		CC2XXXX-000		N	0	Not Signed off yet				
5	9/30/2015	4000XX	Academic Dept	Steven Black	345678/ 2	2-No	Active	Professional & Exec Non-Grade	0080	Instructor of Clinical	N		OP348XXX	100	OP3 FAO		CC2XXXX-000		N	0	Not Signed off yet				
6	9/30/2015	4000XX	Academic Dept	Penny Counter	456789/ 0	0-No	Active	Grads and PD-Appointment	0093	Postdoctoral Assoc	N		GR523XXX	100	GR5 FAO	Penny Counter	CC2XXXX-000		N	0	Not Signed off yet				
7	9/30/2015	4000XX	Academic Dept	Henry Storm	176421/ 0	0-No	Active	PAS Staff	1256	Administrative Asst	N		OP21XXX	100	OP2 FAO		CC2XXXX-000		N	0	Not Signed off yet				
8	9/30/2015	4000XX	Academic Dept	Marvelousi Lake	204018/ 0	0-No	Active	Faculty	0005	Asst Professor	N		OP348XXX	100	OP3 FAO		CC2XXXX-000		N	0	Not Signed off yet				
9	9/30/2015	4000XX	Academic Dept	Marvelousi Lake	204018/ 0	0-No	Active	Faculty	0005	Asst Professor	N		GR523XXX	35	GR5 FAO	Penny Counter	CC2XXXX-000		N	0	Not Signed off yet				
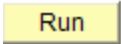
PCSR Report Fields

a. **Report Period**: **Confirming Distribution As Of** date i.e. 09/30/15
b. **Dept**: HR Department Number
c. **Dept description**: HR Department description
d. **Name**: first, middle, last
e. **Emplid**: emplid and empl record number
f. **Coded Distribution**: 0, 1, 2
g. **Current Status**: Active, Leave, etc.
h. **Job Group**: Faculty, PAS Staff, Students, etc.
i. **Job Code**: Four digit code on appointment form
j. **Jobcode Desc**: Position description in HRMS associated with the Job Code
k. **Multiple Job Employee**?: Checkbox will indicate if employee has multiple jobs
l. **Plan vs Actual** (at time the report is run):
   i. A "blank" field indicates the **Planned Distribution** equaled **Actual Distribution**
   ii. *"PLANNED"* and *"ACTUAL"* display when the **Planned Distribution** does not equal the **Actual Distribution** for the individual.
m. **FAO (Acct)**: FAO supporting effort distribution
n. **Pct**: Effort distribution in percentage terms
o. **Description**: Description of FAO
p. **PI**: PI for FAO assigned in UR Financials, or blank
q. **Cost Center**: Cost Center assigned to FAO
r. **Sponsor**: Sponsor code for GR FAOs, or blank
s. **Fed Acct?**: Y if FAO is classified as federal or federal flow through
t. **Seq**: Indicates Cost Sharing sequence number, 0 if not applicable
u. **Signoff:** Signoff selection status (e.g. *"Sign off-OKAY"*)
v. **Date**: Date user saved the record
w. **User**: PAF User Name who saved the record
x. **Comment for Code 2**: e.g. *"Federal-Budg/Apprv by Sponsor"*
y. **Comment**: Required *"Comment"* or optional notes entered by the reviewer
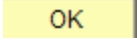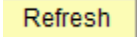
PCSR Department Status Report

This report provides a summary by "Sign-Off" category to monitor departmental progress throughout the survey process. It can be run to see how many records have been reviewed versus the number of records outstanding for each HR department.

To run the PCSR Department Status report:
1. Select 'Main Menu'
2. Select 'UR Reports and Interfaces'
3. Select 'Labor Distribution'
4. Select 'PCSR'
5. Select 'PCSR Department Status'
6. Enter "Run Control ID"
7. Enter "As Of Date" (09/30/20XX)
8. Select [Run] (all appropriate records will be returned, based on a reviewer's access)
9. Check box will display for **PCSR Report UPY6026**:

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
☑	PCSR Report	UPY6024	SQR Report	Web	CSV	Distribution

10. Select [OK]
11. Select Process Monitor
12. Select [Refresh]
13. When **Run Status** is "Success", Click "Details"

Run Status	Distribution Status	Details
Success	Posted	Details

14. Click View Log/Trace
15. Click UPY 6026 #######.csv to open the report
16. Select Open> File> Save As and Rename (name the file something that makes sense)

[sample screen: PCSR Department Status Report]

	A	B	C	D	E	F	G	H	I	J	K
1	HR Division	HR Dept Number	HR Dept	HR Dept Name	Individuals for Review	Not Signed Off	Override	Reallocation Processed	Reallocation Pending	Sign Off	Terminated
2	40	0080	400080	Academic Department	7	7	0	0	0	0	0

PCSR Department Status Report Fields

   a. **HR Division:** Two digit HR Division number
   b. **HR Dept Number**: Four digit HR Department number
   c. **HR Dept**: Combined HR Division Department number
   d. **HR Dept Name**: HR Department description
   e. **Individuals for Review**: Total number of individuals by HR Department number
   f. **Not Signed Off**: Number of individuals whose records are *"Not Signed Off"*
   g. **Override**: Number of individuals with sign off status "Override"
   h. **Reallocation Processed**: Number of individuals with sign off status "Reallocation Processed"
   i. **Reallocation Pending**: Number of individuals with sign off status "Reallocation Pending"
   j. **Sign Off**: Number of individuals with sign off status "Okay"
   k. **Terminated**: Number of individuals with sign off status "Terminated"

Appendix

Decision Tree / Distribution Other Than Code 1 or Code 2

```
┌─────────────────────────┐
│   Selected Individual    │
│ Employee Coded           │
│ Distribution = "No"      │
└─────────────────────────┘
```

Planned Distribution = Actual Distribution? — No → Actual Distribution Correct? — No → Generate 800 Form

Planned Distribution = Actual Distribution? — Yes → Actual Distribution Correct?

Actual Distribution Correct? — No (dashed line to Generate 800 Form)

Actual Distribution Correct? — Yes → Go to "*Sign off for this employee?" *Select* "Sign Off-OKAY"

Actual Distribution Correct? — Yes → Go to "*Sign off for this employee" *Select* "Reallocation processed-OKAY" or "Override was Used-OKAY"

Generate 800 Form → Go to "*Sign off for this employee" *Select* "Reallocation Pending-OKAY" → "Comment" *Enter* appropriate comment to support Reallocation

Select "Save"

Select "Next in List" or "Return to Search" or "Previous in List"

Decision Tree / Code 1 Distribution – FACULTY 100% SPONSORED EFFORT

```
Selected Individual
Employee Coded Distribution = "1"
```

Planned Distribution = Actual Distribution?

— No → **Actual Distribution Correct?**

— No → **Generate 800 Form**

Planned Distribution = Actual Distribution? — Yes →

Actual Distribution Correct?

— No → (to Generate 800 Form, dashed)

— Yes →

```
Go to "*Sign off for
this employee?"

Select "Sign Off-
OKAY"
```

```
Go to "*Sign off for this
employee"

Select "Reallocation
processed-OKAY" or
"Override was Used-
OKAY"
```

```
Go to "*Sign off for
this employee"

Select "Reallocation
Pending-OKAY"
```

```
"Comment" Enter appropriate
comment to support
Reallocation
```

```
"Comment" Enter appropriate comment to support 100% distribution.
```

```
Select "Save"
```

```
Select "Next in List" or
"Return to Search" or
"Previous in List"
```

Decision Tree / Code 2 Distribution – ADMINISTRATIVE and CLERICAL SPONSORED EFFORT

PCSR Decision Tree / Code 2 Distribution – Administrative Sponsored Effort

```
Selected Individual
Employee Coded Distribution = "2"
        │
        ▼
  Planned
  Distribution =      ── No ──▶   Actual
  Actual                        Distribution   ── No ──▶   Generate 800 Form
  Distribution?                  Correct?
        │                          │                          │
       Yes                        Yes                         │
        │                          │                          │
        ▼                          ▼                          ▼
  Actual          ── No ──▶  Go to "*Sign off for    Go to "*Sign off for
  Distribution               this employee"          this employee"
  Correct?                   
        │                    Select 'Reallocation    Select 'Reallocation
       Yes                   processed-OKAY" or      Pending-OKAY"
        │                    'Override was Used-
        ▼                    OKAY"                          │
  Go to "*Sign off for                                      ▼
  this employee?"                                     "Comment" Enter appropriate
                                                      comment to support
  Select 'Sign Off-                                   Reallocation
  OKAY"
```

"* Comments for Code 2" Select/Enter appropriate comment to support sponsored effort distribution

Select "Save"

Select 'Next in List" or 'Return to Search" or 'Previous in List"