

## Assignment and Department/Payroll Area Changes (Example)

Simplified example of the process and what to do when an individual's assignment and department/area changes. Broader details and information available on QRC CDEM Complete Details.

### PRIOR DEPARTMENT

Prior department's responsibilities

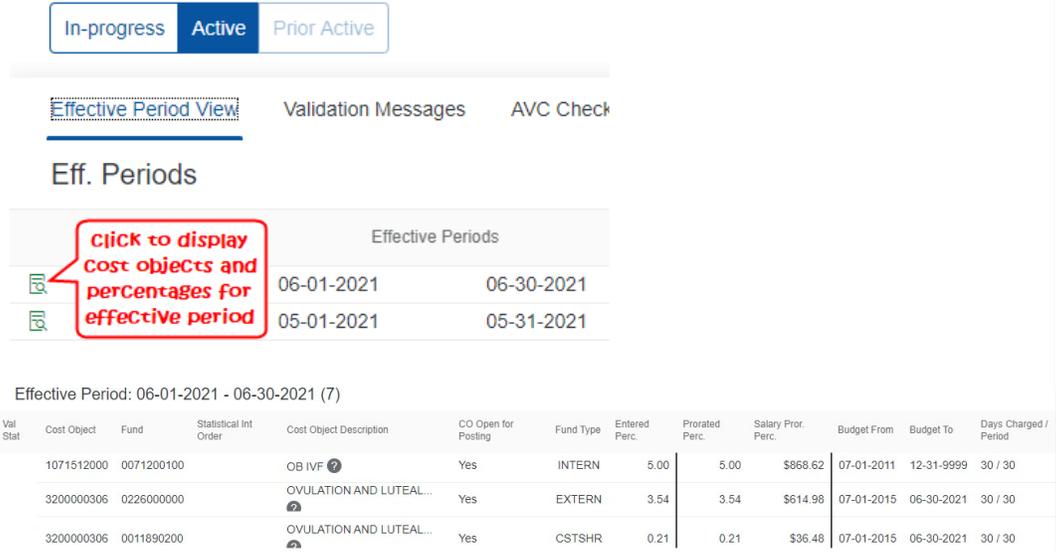
Note: Once the individual's new assignment begins, the previous department can only change distribution effective periods from ERD to the end date of previous assignment

- CDEM creates a "Future assignment change" alert when the IT0001 (assignment) change is detected
- **Prior department needs to review individual's distribution for reasonableness in relation to the work performed**
- **If distribution needs to change, prior department needs to create In-progress plan, make necessary changes and initiate In-progress plan to update IT27. If In-progress plan is not approved before the individual's last day of the assignment, CDEM will delete the In-progress plan.**

Note: Control Records for retired personnel are delimited 1 to 2 pay periods pass their end date so fringe and taxes can be charged

Review Active plan cost distributions to confirm accuracy

If corrections are needed, create and initiate In-Progress plan to update IT27s (follow QRC Create, Initiate and Approve In-Progress Plan)



Effective Period: 06-01-2021 - 06-30-2021 (7)

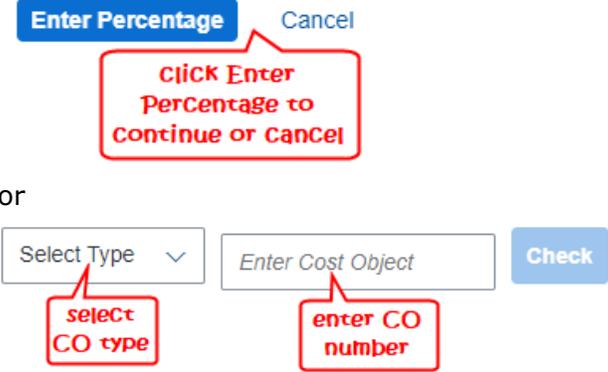
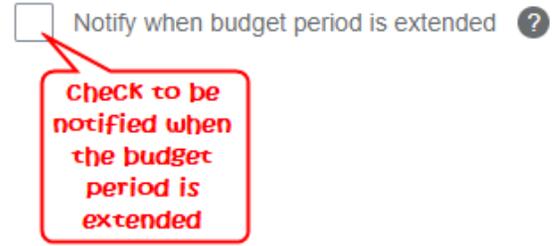
Val Stat	Cost Object	Fund	Statistical Int Order	Cost Object Description	CO Open for Posting	Fund Type	Entered Perc.	Prorated Perc.	Salary Pror. Perc.	Budget From	Budget To	Days Charged / Period
	1071512000	0071200100		OB IVF	Yes	INTERN	5.00	5.00	\$868.62	07-01-2011	12-31-9999	30 / 30
	3200000306	0226000000		OVULATION AND LUTEAL...	Yes	EXTERN	3.54	3.54	\$614.98	07-01-2015	06-30-2021	30 / 30
	3200000306	0011890200		OVULATION AND LUTEAL...	Yes	CSTSHR	0.21	0.21	\$36.48	07-01-2015	06-30-2021	30 / 30

<b>CDEM</b>	
CDEM's responsibilities	<ul style="list-style-type: none"> <li><b>CDEM creates a "Future assignment change" alert when the IT0001 (assignment) change is detected</b></li> <li><b>On the first day of new assignment, CDEM delimits the individual's previous control record effective date to their end date</b></li> <li><b>If there are distribution effective periods that go beyond the old control record's end date, CDEM creates an In-progress plan (CDEM will overwrite any existing In-progress plan)</b></li> <li><b>CDEM edits In-progress plan to delimit effective periods beyond the individual's end date</b></li> <li><b>CDEM initiates and approves In-progress plan to update IT27</b></li> </ul>
<b>NEW DEPARTMENT</b>	
New Department's responsibilities	<ul style="list-style-type: none"> <li><b>New department enters an assignment change PA40 Request for Personnel Action</b></li> <li><b>New department creates a control record in CDEM if IT27s will be used for the cost distribution</b></li> <li><b>New department adds Commitments for the assignment</b></li> <li><b>New department creates In-progress plan to reflect individual's new cost distribution plan</b></li> <li><b>New department initiates In-progress plan to update IT27</b></li> </ul>
<p>Search for faculty member</p> <p>Enter their first or last name, person ID or PERNR</p> <p>Available results will populate as you type</p> <p>Select individual</p>	
If individual does not populate from the search or available list, click <b>Create Control Record</b> to create a new control record	

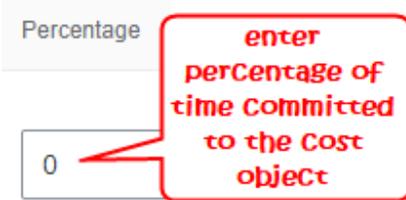
Quick Reference Card – CDEM Assignment and Department/Payroll Area Changes (Example)

<p>Enter last name or person ID and click Search for Person</p> <p>Click the box to the left of the individual</p> <p>Confirm individual's information is correct</p> <p>Click add icon to create new control record</p> <p>Note: Duplicate control record produces an error message</p>	<p>Individual's 1018 cost object will be added to the Commitments and an In-progress plan will be created for revisions, review and submission</p>
<p>Click Control Record to view change in Record Effective date</p>	
<p>Click add icon to add a commitment item</p>	

Quick Reference Card – CDEM Assignment and Department/Payroll Area Changes (Example)

<p>Select type of cost object</p> <p>CC = Cost Center WBS = Grant</p>	
<p>Enter cost object number</p>	
<p>Click check to display cost object details</p> <p>The cost object's summary information will populate</p> <p>Review information to validate this is the correct cost object</p>	
<p>If the cost object entered is correct, click Enter Percentage</p> <p>If the cost object entered is not correct, re-enter the cost object number and click check</p>	
<p>Check to be notified when the budget period is extended</p> <p>Notification can be check/unchecked at any time</p>	 <p>Notification message will be listed in Alerts</p>

Quick Reference Card – CDEM Assignment and Department/Payroll Area Changes (Example)

<p>CDEM populates the funds associated with the cost object</p> <p>For WBS elements, all funds will be present, even if the percentage is 0%</p>	
<p>Enter the general percentage of time committed to working on a project over the effective period</p> <p>Note: Fringe follows salary percentage</p>	
<p>Enter a note (optional) in the text field to add descriptive and helpful information in reference to the entry</p>	
<p>Click Save to continue. The commitment list will refresh with the change</p>	
<p>Create and initiate In-Progress plan</p>	<p>Follow QRC Create, Initiate and Approve In-Progress Plan in CDEM to update IT27s</p>