This form should be completed, signed and submitted via a Service-Now ticket along with the Pre-Journal data. The Payroll Coordination & Analysis (PCA) team will review the request for completeness and will forward the request for approval workflow.

If approved through the workflow, a manual journal entry (JRV) will be processed.

Each request must be submitted for a single employee, limited to one position, one Fiscal year, and one or more earnings dates.

|  |
| --- |
| **Manual Form Criteria Determination**  |
| Request Preparation Date \* | Click or tap to enter a date. |
| Requestor’s Name \*  | Click or tap here to enter text. |
| Requester’s Employee ID \* | Click or tap here to enter text. |
| Requester’s ORG Code \* | Click or tap here to enter text. |
| Requester’s Department Code \* | Click or tap here to enter text. |
| Select reason for the manual request \* | Choose an item. |
| Please explain the reason for the manual request \* | Click or tap here to enter text. |
| Benefits only transfer?  | [ ]   |
| **Salary Cost Transfer Summary by Employee, Position, and Pay Period. (Note: if approved, the salary and related benefits/assessments will be transferred)**  |
| Employee ID \* | Click or tap here to enter text. |
| Name of Employee Associated with the SCT  | Click or tap here to enter text. |
| Position Number \* | Click or tap here to enter text. |
| Original Salary Expense Amount for transfer \*  | Click or tap here to enter text. |
| Original Salary Expense CoA “Transfer from CoA” \* (Entity-Fund-Activity-Account-Function-Program-Project-Flex1-Flex2)  | Click or tap here to enter text. |
| Total Salary, Benefits & Assessments Transfer to Amount \* | Click or tap here to enter text. |
| Requested “Transfer to CoA” \* (Entity-Fund-Activity-Account-Function-Program-Project- Flex1-Flex2)  | Click or tap here to enter text. |
| Select reason for Salary Cost Transfer \* | Choose an item. |
| Please explain the reason for the salary cost transfer \* | Click or tap here to enter text. |
| **Approvals:** 1) If the SCT involves a C&G project, obtain the PI’s approval to confirm the employee worked on the project receiving the charge for the pay period indicated above and the proposed transfer of salary costs are reasonable based on the work performed; 2) Financial & Administrative Officer’s approval confirms the information provided above is correct, conforms to UC Policy, and adheres to the terms and conditions of the awards; 3) If the SCT is transferring salaries over 90 days from the Project End Date, CFAO approval must be obtained 4) And, If the SCT is transferring salaries over 120 days from the Original Pay Period End Date, CFAO approval must be obtained.  |
| Responsible FAO Signature and Date  |  |
| Responsible CFAO Signature and Date (If Applicable)  |   |
| Responsible Principal Investigator Signature and Date(If Applicable) |  |

\*Required field
Note: Incomplete submission of the request will be returned to the requestor and will delay the process.