RUTGERS
THE STATE UNIVERSITY OF NEW JERSEY

SWRJ Preparation

SWRJ (Salary And Wage Redistribution and Justification)

SWRJs need to be performed when payroll transactions were charged to the departmental default account because either a grant award has expired. These amounts are designated with a natural account of “1699.”

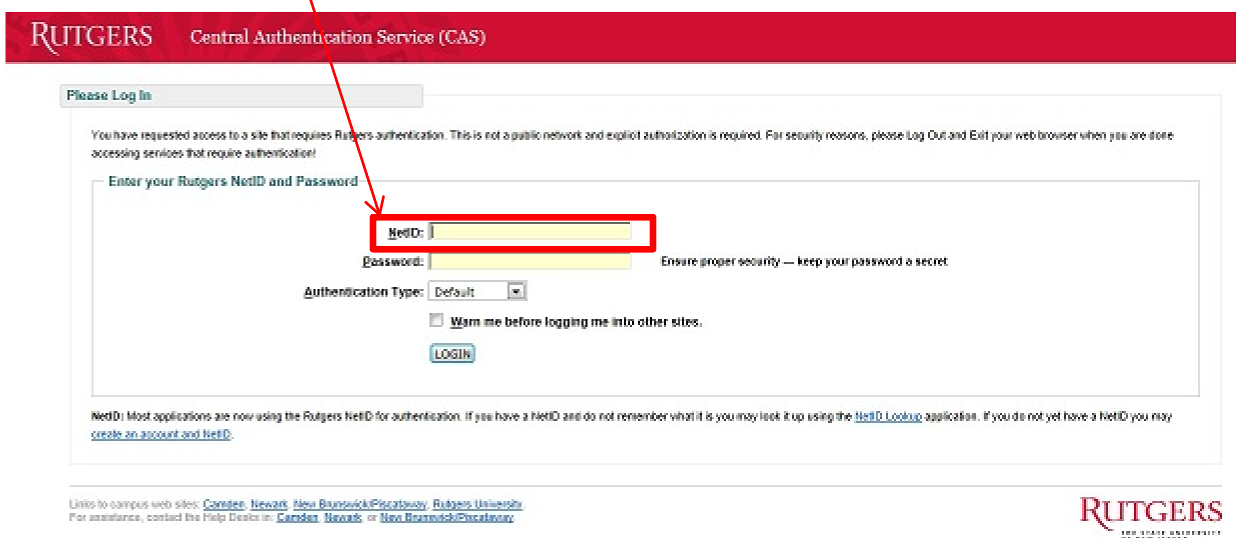
- If there is a salary commitment that needs to be changed, and the time period to be changed is less than two pay-periods in the past, you can change the charging instructions (fund sources) **without** the use of an SWRJ (this is recommended). You may change the charging instructions through the department budget table.
- As a reminder, it is the department’s responsibility to clear 1699 items.
- When a commitment accounting instruction is not completed or is incorrect, complete a SWRJ.

SWRJ Preparation Example

SWRJ (Salary And Wage Redistribution and Justification)

Step 1

- Login below using Net ID.

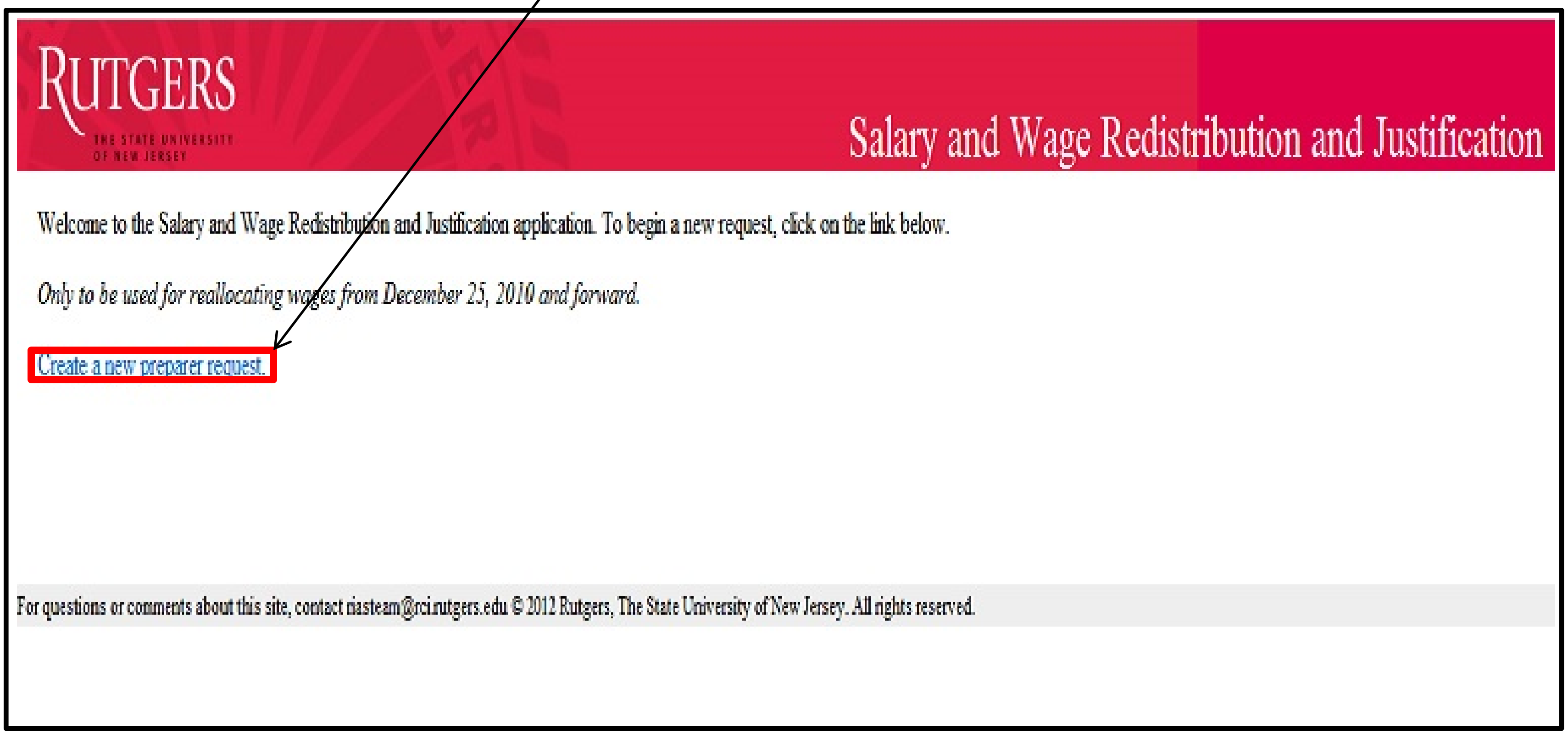


Please Note: This is only an example

SWRJ Preparation Example

Step 2

- Click on “Create a new preparer request.”



SWRJ Preparation Example

Step 3

- System will generate the following fields:
  - Username
  - Preparer first name
  - Preparer last name
  - Preparer e-mail
- You must populate to following fields:
  - Preparer phone number

Create a New Salary and Wage Redistribution and Justification Form

Preparer

Username	mrm187
Preparer First Name*	
Preparer Last Name*	
Preparer E-mail*	
Preparer Phone*	

Please Note: This is only an example

SWRJ Preparation Example

Step 4

- This is the employees information for which the reallocation is being performed.
- Approver e-mail is email address of responsible accountant at Business office.

Employee

Employee ID*

Employee Record #*

Employee First Name*

Employee Last Name*

Employee Class (Type)*

Employee Org/Dept*

At time of distribution

Approver

Approver E-mail*

SWRJ Preparation Example

Step 5

- Key in additional fields below
  - Comment justification must be filled out based on request SWRJ criteria as this is mandatory.
  - Comment delay must be filled out if SWRJ is beyond 90 days from current date (adjustment end date).
    - For Example – If adjustment end date is 12/31/20XX, comment delay is needed if processed after 03/31/20XX.
  - Comment to payroll –use "approximately" when referencing the dollar amount being moved.

Additional Fields

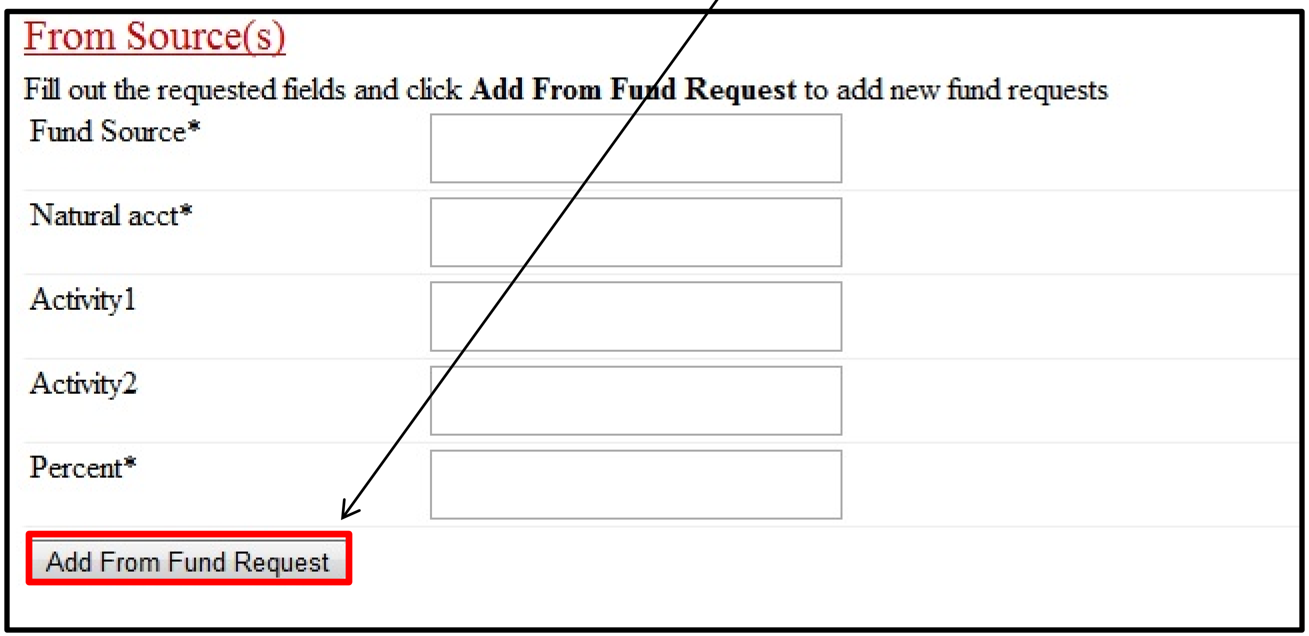
Adjustment Start*	--- / --- / ---
Adjustment End	--- / --- / ---
Comment Justification* Justification for transfer of payroll expenses (Estimated amount to be redistributed as well as special instructions such as overtime only)	
Comment Delay If the date this form is submitted is more than 90 days later than the From date, please provide an explanation for this delay	
Comments To Payroll	

Note: that this form is the payroll departments only guidance on how to appropriately record and approve your request.

Please Note: This is only an example

Step 6

- From sources (this should match budget table for beginning time period).
  - The total of all percentages listed in the "From source(s)" section should always total 100%.
  - The charging instructions (From Source) for this employee can be obtained from Commitment Accounting (Department Budget Table) in HCM. Please see commitment section of this presentation.
  - To add additional "From fund sources" click button below.



Please Note: This is only an example

SWRJ Preparation Example

Step 7

- Select correct employee record based on current job appointment.
- In most instances it will record with the payroll status of "Active."
- For a list of employee classification types, please click the icon below.

Payroll Types

Search Results

View All — First 1-2 of 2 Last

Empl ID	Empl Record	First Name	Last Name	Middle Name	Department	Pay Group	Employee Classification	Effective Date	Payroll Status	Job Code	Description
00029	)			(blank)	SEBS-Plant Biology & Pathology	HLY	4	04/23/2012	Terminated	04200	LABORATORY/TECHNICAL
00029	1			(blank)	SEBS-Continuing Prof Education	S01	3	07/01/2012	Active	03333	Unit Administrator/Specialist

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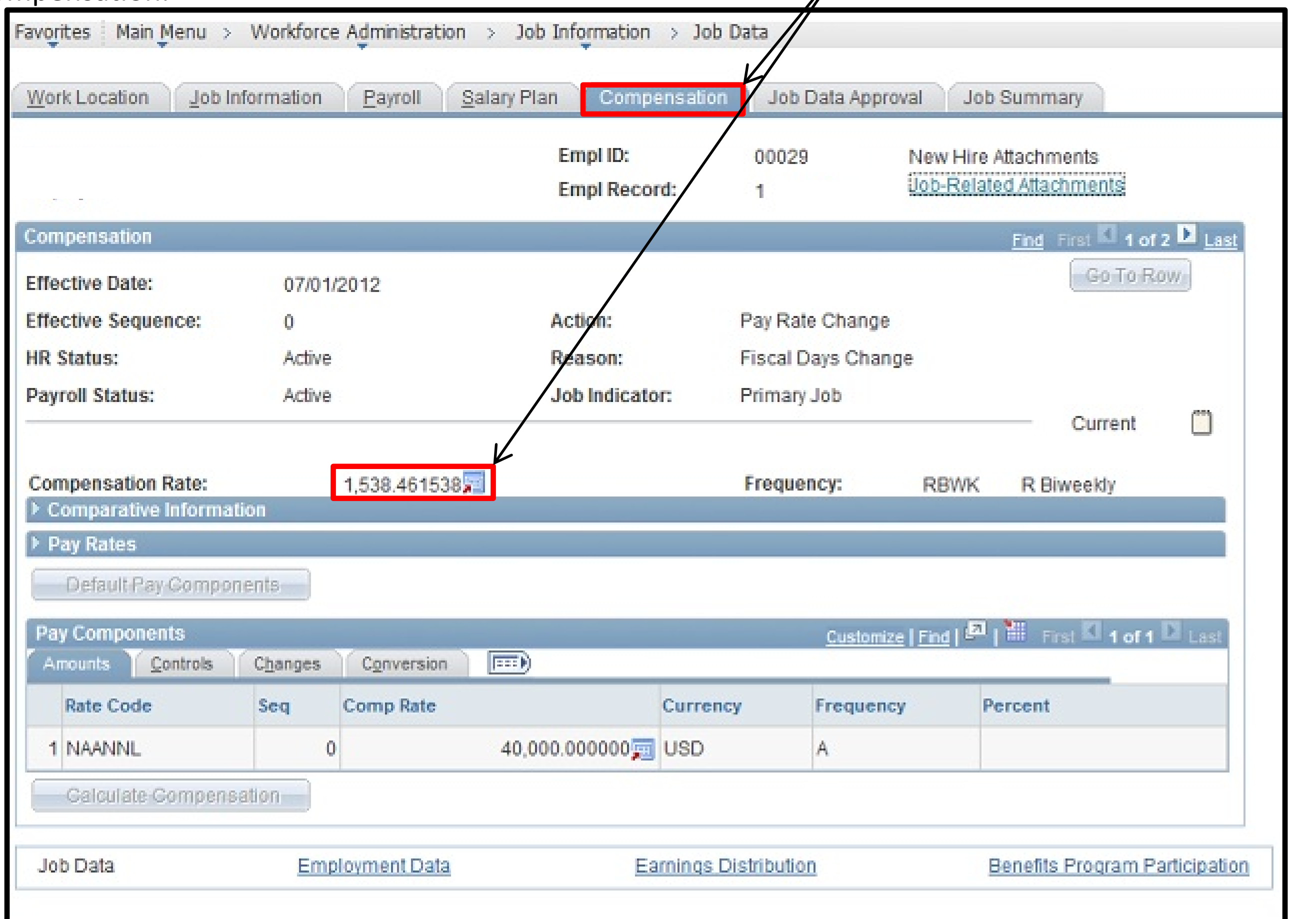
SWRJ Preparation Example

Step 8

- The next screen has the main tab you will utilize to finish the SWRJ. Use this tab to determine the bi-weekly compensation.



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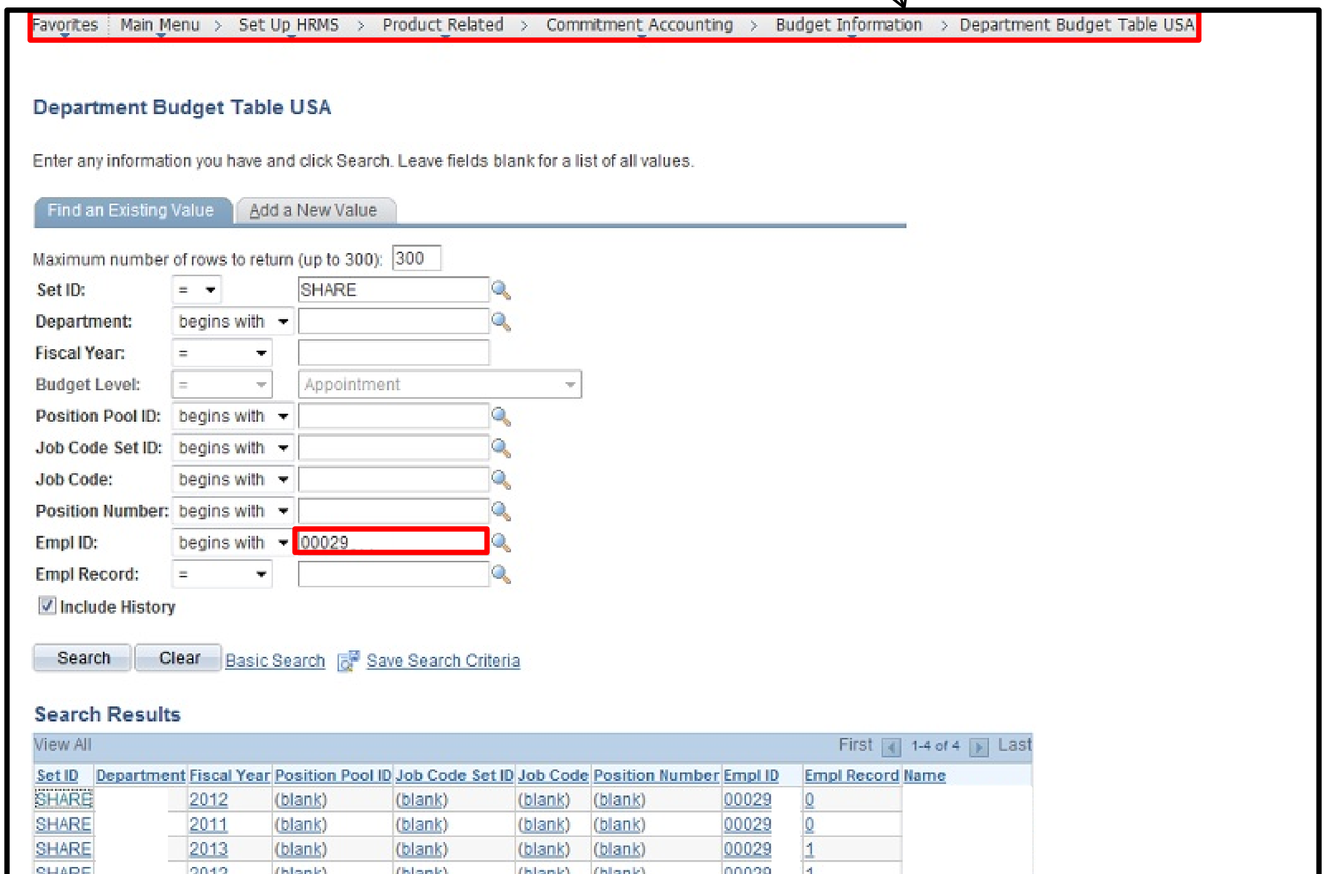
SWRJ Preparation Example

Step 9

Use budget table to determine fund source codes:

- Enter Employee ID.
- Please see file path location below to access the budget table.
- Select applicable year and employee record.



Favorites | Main Menu > Set Up HRMS > Product Related > Commitment Accounting > Budget Information > Department Budget Table USA

Department Budget Table USA

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

Find an Existing Value | Add a New Value

Maximum number of rows to return (up to 300): 300

Field	Operator	Value
Set ID:	=	SHARE
Department:	begins with	
Fiscal Year:	=	
Budget Level:	=	Appointment
Position Pool ID:	begins with	
Job Code Set ID:	begins with	
Job Code:	begins with	
Position Number:	begins with	
Empl ID:	begins with	00029
Empl Record:	=	

☑ Include History

Search | Clear | Basic Search | Save Search Criteria

Search Results

View All — First 1-4 of 4 Last

Set ID	Department	Fiscal Year	Position Pool ID	Job Code Set ID	Job Code	Position Number	Empl ID	Empl Record	Name
SHARE		2012	(blank)	(blank)	(blank)	(blank)	00029	0	
SHARE		2011	(blank)	(blank)	(blank)	(blank)	00029	0	
SHARE		2013	(blank)	(blank)	(blank)	(blank)	00029	1	
SHARE		2012	(blank)	(blank)	(blank)	(blank)	00029	1	

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SWRJ Preparation Example

Step 10

- Use the budget table to determine the distribution percentages.

Dept Budget Earnings

Set ID: SHARE Department: SEBS Fiscal Year: 2013

Budget Begin Date: 07/01/2012 Offset Group: RUT

Budget End Date: 06/30/2013

Budget Cap: (•) Per Budget Level ( ) Per Earn/Tax/Ded

Level Find | View All First 1 of 4 Last

( ) Department ( ) Position Pool ( ) Jobcode ( ) Position (•) Appointment

Empl ID: 00029
Empl Record: 1

Effective Date: 02/04/2013 Eff Seq: 1 Status: Active Date Entered: 03/27/2013
Last Updated By:
Budget Level Cap: 0.00 Currency: USD Last Updated On: 03/27/2013

Earnings Distribution Customize | Find | First 1-3 of 3 Last

Combination Code | Distributed | Earning Code Description | Combination Code Description

	Earnings Code	Sequence Number	Combination Code	Funding End Date	Fiscal Year Budget Amount	Distribution %
1		1		03/31/2013		5.306
2		1		03/31/2013		44.694
3		1		03/31/2013		50.000

Save | Return to Search | Previous in List | Next in List | Notify | Add | Update/Display | Include History

You will utilize these percentages in the "from source."

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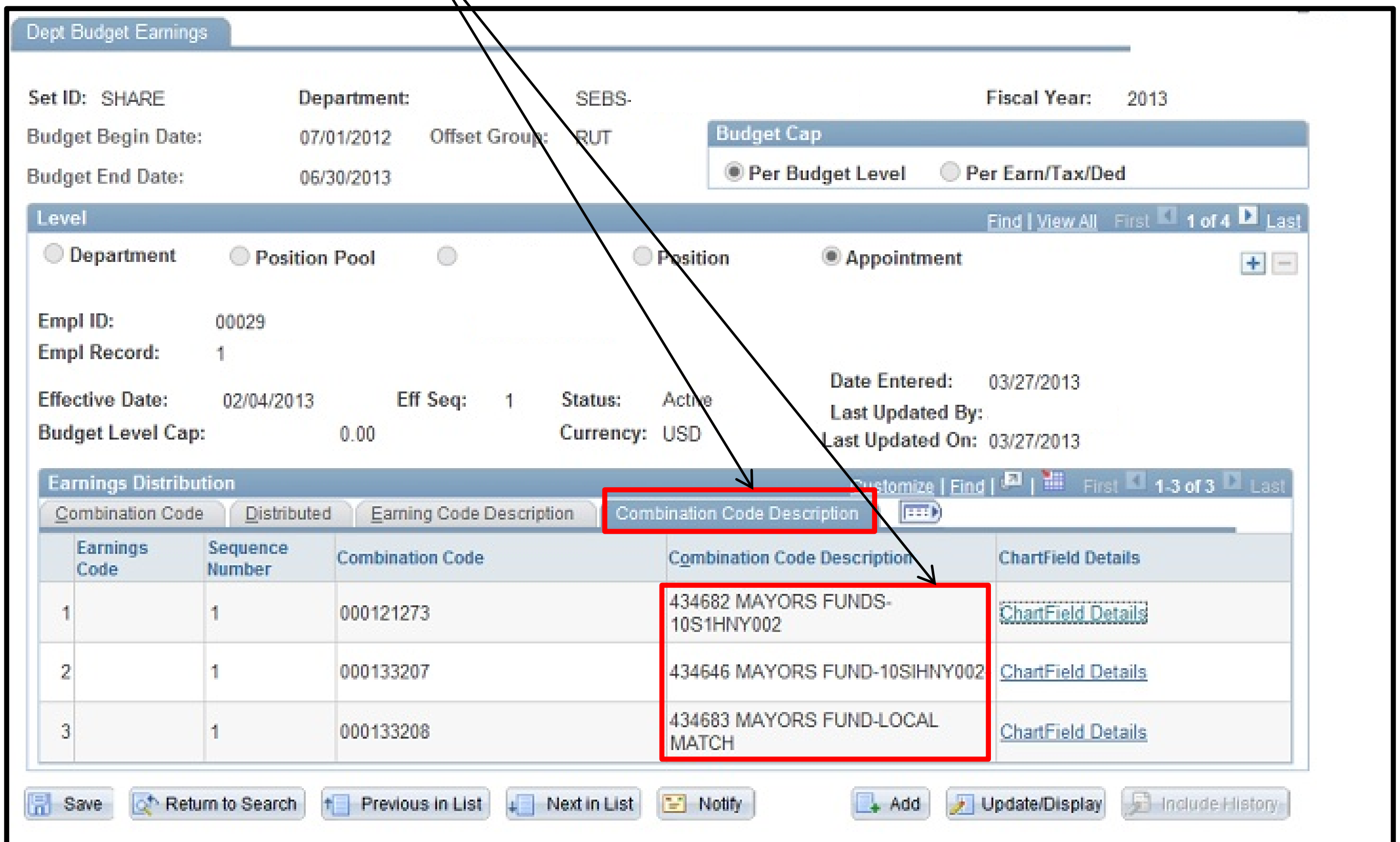
SWRJ Preparation Example

Step 11

- Click on the combination code description tab below to obtain the combination code description. These codes will be utilized in the "from source."



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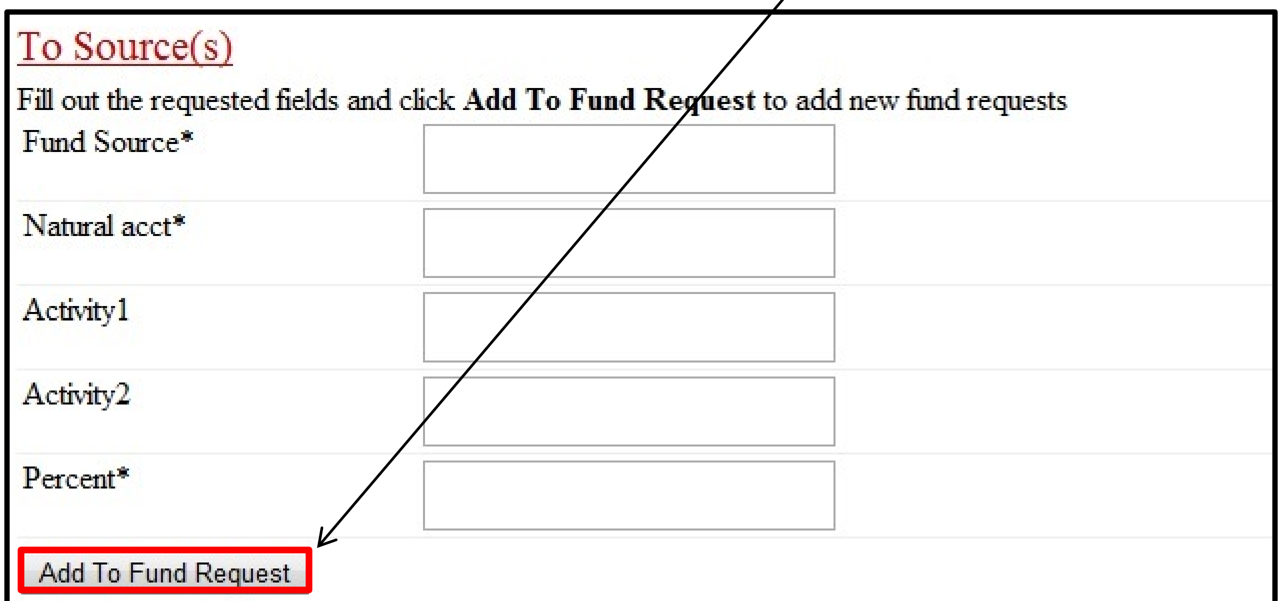
SWRJ Preparation Example

Step 12

- Make sure to use Dept. Activity 1, (SEBS01234) and Dept. Activity 2(subcode), if necessary. Project number should always be preceded by "SEBS".
  - 01234 is the project assigned to this fund source (Example only).
  - Percent should always equal 100.
  - To add additional "to fund sources" click on the button below.



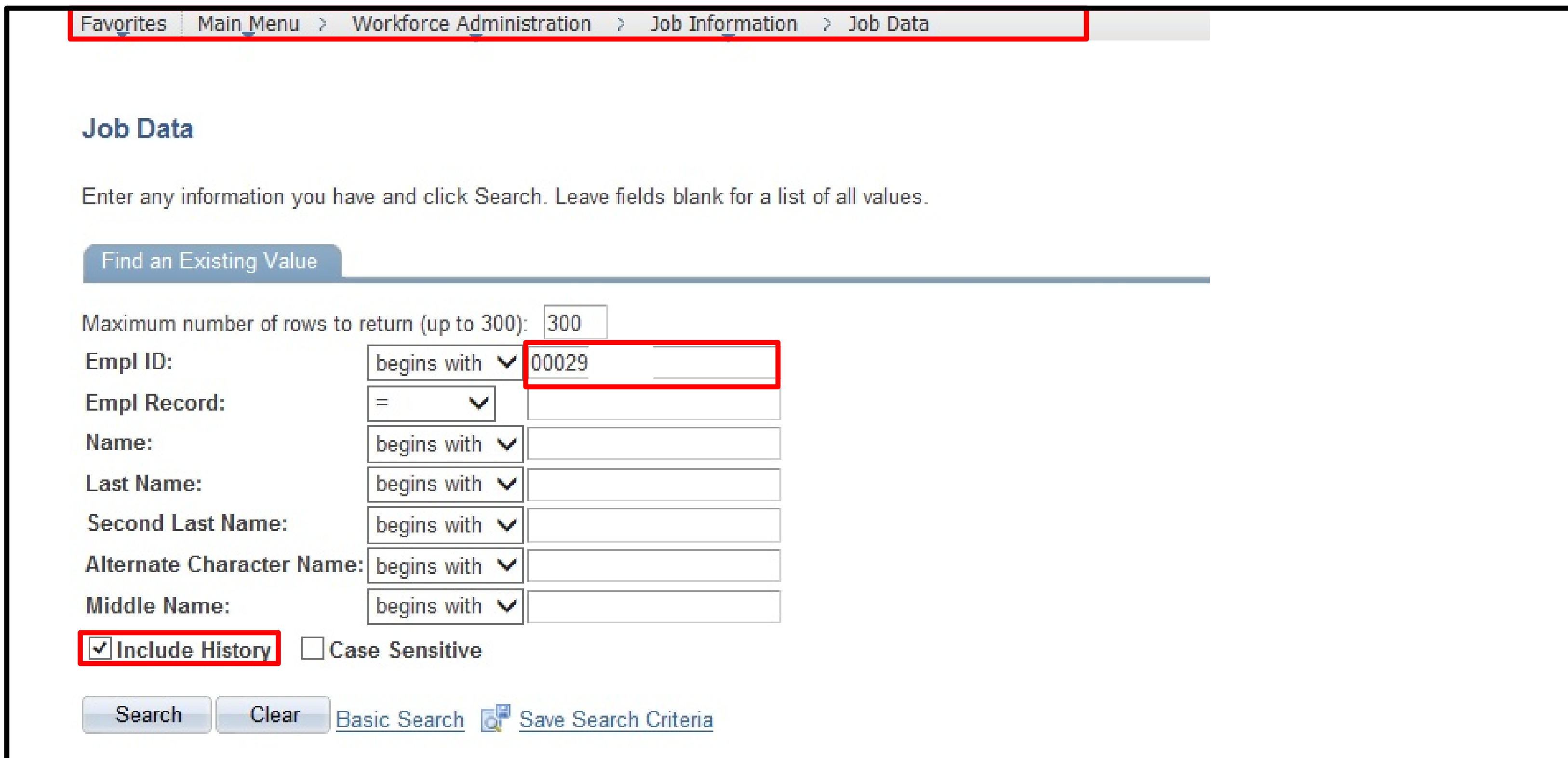
- SWRJ preparation template. SWRJ Template

Please Note: This is only an example

SWRJ Preparation Example

Example:

- In conjunction with department budget table and PD screen, utilize the job data table to ensure the appropriate amounts are used.
- See file path location for Job Data table highlighted in red.
- Input employee ID*, and check “Include History.”



Note: *The last three digits of the example I.D. have been omitted

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SWRJ Preparation Example

Example:

To identify the fund source, natural account, dollar amount and pay period that the employee was charged, use the "FD Payroll Distribution Report New (PD)," "By Employee & Date Range (Detail)" report in Discoverer. This screen will show the employee name, employee ID, employee record number, fund source, natural account, pay period date, pay period amount charged and Dept. Activity 1 and Dept. Activity 2.

Connect > Workbooks >

FD Payroll Distribution Report New (PD) - By Employee & Date Range (Detail)

Last run **Friday, April 5, 2013 03:21:23 PM EDT**

Parameters

Select values for the following parameters.

* Indicates required field

* Enter Employee Last Name with Wild Card %	' (Use % as a wildcard.)
* Date Type (1-4) see description	'1' (1-GL Posting Date, 2-Payroll period end date, 3-Check date, 4-Redistribution date)
* From Date of GL Post, PayPeriodEnd, Check, or Redistribution	'1-JAN-2013' Enter Date in a format DD-MON-YYYY
* To Date of GL Post, PayPeriodEnd, Check, or Redistribution	'4-APR-2013' Enter Date in a format DD-MON-YYYY
* Secondary Date Type (0-4)	'0' (0-No secondary date, 1-GL Posting Date, 2-Payroll period end date, 3-Check date, 4-Redistribution date)
Secondary From Date of GL Post, PayPeriodEnd, Check, or Redistribution	 Secondary From Date (based on Secondary Date Type). Enter Date in a format DD-MON-YYYY.
Secondary To Date of GL Post, PayPeriodEnd, Check, or Redistribution	 Secondary To Date (based on Secondary Date Type). Enter Date in a format DD-MON-YYYY.

Go

Note: The employee name has been omitted for privacy.

SWRJ Preparation Example

Business Office Suggestions:

- The PD screen must be submitted as supporting documentation with your salary reallocation. Since the SWRJ form doesn't allow attachments, a screen shot must be emailed to your approver in the Business Office. Your SWRJ will not be processed without this report.
- The Department Budget Table, Combination Code tab, located in the "Earnings Distribution" section must be submitted as supporting documentation with your salary reallocation, if applicable. Since the SWRJ form doesn't allow attachments, a screen shot must be emailed to your approver in the Business Office. Your SWRJ will not be processed without this report.