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 (Salary And Wage Redistribution and Justification)

**Step 1**
- Login below using Net ID.
Step 2

- Click on “Create a new preparer request.”
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

Please Note: This is only an 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.

Please Note: This is only an 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).
    
    o 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.

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
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.

Please Note: This is only an 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.

Please Note: This is only an 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.

![Department Budget Table USA](image-url)
Step 10

- Use the budget table to determine the distribution percentages.

Please Note: This is only an 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.”

Please Note: This is only an 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.

To Source(s)

Fill out the requested fields and click Add To Fund Request to add new fund requests

<table>
<thead>
<tr>
<th>Fund Source*</th>
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<table>
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<tr>
<th>Natural acct*</th>
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<table>
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<th>Activity2</th>
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<th>Percent*</th>
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Add To Fund Request

Please Note: This is only an 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*
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.

Note: The employee name has been omitted for privacy.
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.