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)
### CDEM

**CDEM’s responsibilities**
- CDEM creates a “Future assignment change” alert when the IT0001 (assignment) change is detected
- On the first day of new assignment, CDEM delimits the individual’s previous control record effective date to their end date
- 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)
- CDEM edits In-progress plan to delimit effective periods beyond the individual’s end date
- CDEM initiates and approves In-progress plan to update IT27

### NEW DEPARTMENT

**New Department’s responsibilities**
- New department enters an assignment change PA40 Request for Personnel Action
- New department creates a control record in CDEM if IT27s will be used for the cost distribution
- New department adds Commitments for the assignment
- New department creates In-progress plan to reflect individual’s new cost distribution plan
- New department initiates In-progress plan to update IT27

### Search for faculty member

Enter their first or last name, person ID or PERNR

Available results will populate as you type

Select individual

If individual does not populate from the search or available list, click **Create Control Record** to create a new control record

![Image of search interface](Image)
Enter last name or person ID and click Search for Person

Click the box to the left of the individual

Confirm individual’s information is correct

Click add icon to create new control record

Note: Duplicate control record produces an error message

Individual’s 1018 cost object will be added to the Commitments and an In-progress plan will be created for revisions, review and submission

Click Control Record to view change in Record Effective date

Click add icon to add a commitment item
**Quick Reference Card – CDEM Assignment and Department/Payroll Area Changes (Example)**

| Select type of cost object | ![Select Type]  
|---------------------------|---
| CC = Cost Center          | ![CC for Cost Center]  
| WBS = Grant               | ![WBS for Grant]  

| Enter cost object number  | ![Enter Cost Object]  

| Click check to display cost object details | ![Check]  
|--------------------------------------------|---
| The cost object’s summary information will populate | ![CO Type: CO, TO or WBS]  
| Review information to validate this is the correct cost object | ![Cost Object: Cost Object Number]  
|                                           | ![Name: CO title]  
|                                           | ![Valid: budget period]  
|                                           | ![Dept: Dept number and title]  
|                                           | ![Person: Principal Investigator name]  
|                                           | ![Resp: ]  
|                                           | ![Fund: Fund center number]  
|                                           | ![Cost Object Open: Yes if open]  
|                                           | ![Budget Period Closed if closed]  
|                                           | ![Valid for: X if valid]  
|                                           | ![Payroll: for payroll]  
|                                           | ![Sponsored: S if flagged]  
|                                           | ![Flag: N if not flagged]  

| If the cost object entered is correct, click Enter Percentage | ![Enter Percentage]  
|---------------------------------------------------------------|---
| If the cost object entered is not correct, re-enter the cost object number and click check | ![Cancel]  

| Check to be notified when the budget period is extended | ![Notify when budget period is extended]  
|--------------------------------------------------------|---
| Notification can be check/unchecked at any time | ![Check to be notified when the budget period is extended]  

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