

Online Direct Retro training questions submitted via chat.

Roles:

1. Can I be preparer and approver? Can the preparer and acct combo owner be the same person?

- Yes you can. Yes they can be the same person.

2. Can preparer and combo code owner be the same person? How to assign these roles?

- Yes. Roles are assigned based on your UMB CA Approver in HRMS which the department has designated.

3. Can you have multiple approval roles in the workflow?

- You can be a preparer and account combo owner, but not an account combo owner and the PI. (the latter only under special situations).

4. I remember previously that forms has been setup in regards to who will be the requestor; Account Combo Owner and PI. How do I find out who are the person for all titles?

- At the present time you will continue to use your internal department list. We are working on developing a list based on the information the departments enter into the HRMS system. Once updated we will notify everyone. Need answer here.

5. Can anyone be in the approver roles?

- Approvers are based on who you have setup as UMB CA Approver in HRMS. We will be checking against that list for authorized approvers.

6. Will security roles be sent out to folks in each department?

- There is no need for security roles to be submitted to the departments.

7. Do we have to submit forms to assign roles?

- No.

8. If the preparer and the account owner are the same, what happens?

- You would get two notices, one as preparer and one to approve as account combo owner.

9. Does the PI have to approve all grant DRs? Or is it just going to be those that are more than 90 days out like they are now?

- No. As before, the PI approval is needed for request over 90 days that affect a sponsored project.

10. Current form requires PI signature only when cost transfer is 90 days late. Does new form require PI approval at all times?

- PI approval is only needed for request over 90 days that affect a sponsored project. It is not needed at all times.

11. Do we have to add a note that says the PI approval is not needed since it is less than 90 days?

- No that is not necessary.

12. Will there be the ability to run reports?

- Not at this time.

13. Can the email notifications go to administrator or another address indicated?

- Email notifications are triggered by the name you enter as the Account Combo Owner and PI.

14. What backup is needed?

- Upload the HRMS Payroll Charges Detail Report (PCD) by **Accounting Period**.
- If cost transfer request affects Effort forms that have already been certified and are closed/archived, attach a request to have the Effort form un-archived (re-opened for recertification). The request should detail the error in the original certification and be signed by the person who certified the original Effort form.
- Any other supporting documents.

15. What document(s) do they need to complete this form as PCD do not capture the earnings codes?

- Earning Codes can be gathered from the paycheck information and from the effort form.

16. Will the effort reporting periods act as a control on the form? Will there be a warning message if you cross effort reporting periods?

- You will be notified that you are crossing effort periods, and that proper documentation and reasoning is required.

FRINGE

17. Is the fringe rate up to date? Should it be 25.1% for faculty.

- Yes the fringe rates are up to- date and will be updated annually on the backend.

18. How many digits can you use with the percentage method?

- Percentage amounts can only be entered up to 2 decimal places. E.x. 55.25%

19. With the calculations, Beryl mentioned that fringe will auto-calculate if the preparer inputs an amount but not if they input a percentage. If the prepare puts a percentage where would they put the fringe numbers?

- The fringe fields will calculate based on the selected wage object code. Fringes will only calculate when using the dollar amount method. Percentage amounts and periods where the fringe rate differ across the periods will not be calculated. HRMS will automatically calculate all fringes during the biweekly payroll post. (see your PCD for exact amounts).

20. The question is specifically, where does the Preparer put the fringe numbers in the system? It looks like that section is locked. It may be helpful in the next session to show amount AND percentage when doing the demo of the system.

- See answer above for fringe amounts.

21. What happens when the fringe has changed over a time period? Does the autofill understand the time frame?

- The fringe tables are/will be updated annually on the back end.

FORMS

22. Are corrections allowed before submitting the form? Example to change the wrong account.

- Edit buttons on the summary page will take you back to the relevant page to make any adjustments before submission.

23. Can you edit forms after submitted?

- No, you have to submit a new form if you determine the information is incorrect.

24. Once the DR form is at "declined" state, it is still at department level. Can the preparer go in and revise? Or preparer has to enter new DR form?

- Once the form is declined you will have to create a new form even at the department level.

25. If we have two/multiple accounts we need to split the debit (one credit to two or multiple debit accounts), do you have extra lines to enter the debit chart string?

- You would have to use separate forms. In the comments box you can provide reference information.

26. So it sounds like you will need to do multiple forms if you have multiple funding sources you are moving expenses from for the same period?

- Yes that is correct.

27. Is it possible to build in reasons into a drop down that can be chosen by preparers?

- We are working on looking at the most common reasons and will provide a drop down in the future.

28. Do the system have print capability?

- We can possibly add. We'll check with our systems developer.

29. Do we have any report query we can run to reflect the Direct Retro after process?

- We do not have any reporting at this time. We are building on the reporting aspect in the next phase.

PI Approval sheet:

- **The PI will receive an email with subject line:**

Direct Retro PI Approval Needed.

- **The body of the email will be:**



TEST EMAIL

Request Number: 45

Please Approve/Decline the following DR Request for Beryl Gwan - Manager, Costing & Compliance

Use this link to [Approve/Decline](#)

- **The PI will click on the link Approve/Decline which will take them to the database via for single sign.
The screen will look like this**

