Submitting a ticket—Payroll Expense Transfer (PET) Requests

Use this to request student pay that has already processed be moved from one speedtype to a different speedtype or to request a change to or from work study. Regardless of whether your request is for a single student, single pay period or for multiple students and/or multiple pay periods, the PET form must be completed and attached. For PETs related to a grant ST, please include descriptive answers to the questions at the bottom of the form. In some instances (when the PET is done more than 90 days after the payment on a grant ST), there may be additional documentation that is needed to complete the request. Please work with the grants accounting office to be sure you have all necessary paperwork completed. To ensure your PET request is processed and approved without delays, be sure to attach any needed documents. There is a link to the form within the ticket. It can also be found on the Student Employment website: <u>https://stuemp.uccs.edu/forms</u>. Additional documentation forms can be found on the <u>Sponsored Projects Accounting webpage</u>.

Step 1—Open the Payroll Expense Transfer (PET) Requests ticket type

Choose the **Payroll Expense Transfer (PET) Requests** ticket type on the Cherwell home page.



Step 2—Select Which Type of Request (Single or Multiple)

Select the radio button to indicate whether this is a single or multiple request. "No" will be the default for a single request. Select "Yes" if you need to make a multiple request.

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Student Employment - SE Case ID : 31307
Submit
Details Required to Complete the Request
Payroll Expense Transfer Request
Please fill out the information below and then use the link below that to access the PET form. Please save that to your computer, fill it out and attach to this ticket.
Student Name:
Link to PET Form
Attach filled out PET form (Do not use quotations in the file name)
Additional Details:

Step 3a—Completing the Form for a Single Request

ments.

 Put your cursor in the Student Name box and either type in or search for the student name (this is the student name in CU-SIS so may not match with the name in HCM). Using the search button (see red circle below) can also help you ensure you have selected the correct student. We ask for this information so that we can search within Cherwell for requests specific to a student.

Tip: If you are having trouble finding the student, type their email address in the student name box. This will usually match the student in the system.

 If you have already completed the PET form, skip to <u>Step 5—Attaching Your Documents</u>. Otherwise, click on the link (see blue circles below) to open the Excel spreadsheet. Be sure to have your pop-up blocker turned off. Then proceed to <u>Step 4—Completing Your Docu-</u>



Step 3b—Completing the Form for a Multiple Request

- 1. Select the "Yes" radio button at the top (red box below).
- Type in your Department number or select your Department name from the drop down. When you enter one, the other will auto-populate. We ask for this information to help complete the request and to be able to search within Cherwell for requests specific to a department.
- Fill in the number of unique students for which the request is being made (see blue box below). We ask for this to help us provide better statistics and to track how many of these requests we are completing.
- If you have already completed the worksheet, skip to <u>Step 5-Attaching Your Documents</u>. Otherwise, click on the link (see purple circles below) to open the Excel spreadsheet. Be sure your pop-up blocker is turned off. Then proceed to <u>Step 4—Completing Your Docu-</u> ments.

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Number of Students: 1	
Additional Details:	
PET Request Sheet (Click here to open the Excel spreadsheet]

Step 4—Completing the Form

The link will open an Excel document. This form is also available on the Student Employment website: <u>https://stuemp.uccs.edu/forms</u>. Complete the spreadsheet with the information needed to complete your PET request. Please be sure to use the most updated form; this is especially important if your PET request involves a Fund 30/31/34 Sponsored Project. Be sure to save the document once complete so you can attach to your ticket.

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Note: When saving your documents, please do not use quotation marks in the file name. For some reason, Cherwell will not allow us to open documents with quotation marks in the file name.

Step 5—Attaching Your Documents

Once you have completed and saved the form, attach it to your ticket using one of the options shown below:

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Student Employment -	SE Case ID : 31307
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Payroll Expense Transfer Request	
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ls this a multiple PET request? 🛛 💿 Yes 🔘 No	
Department Number: Department:	•
Number of Students: 1 Link to PET Form Attach filled out PET form (Do not use quotations in the file name) Additional Details:	

You can either drag and drop your file or you can click the Select Files button to find your saved file. When you have selected the file to attach, you will see the file you are attaching below the Select Files button (see second image below). Click the Submit button to attach your document.



Repeat this step until all applicable documents have been attached.

You can confirm that your documents have been attached by checking the paperclip icon. You can also open the attachments to be sure that you have attached the correct documents and that they are completely filled out. Be sure you have your pop-up blocker turned off if you are trying to open attachments.

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If you check your documents before submitting the ticket and see that you attached the wrong document, please attach the correct document before you submit. If you have already submitted your ticket, please refer to the Editing a Ticket section of the Abbreviated User Guide to attach the correct attachment to your ticket.

Users can delete any incorrect attachments. Follow the same steps described on the previous page to open and check a document but select Delete instead of Open. Cherwell will ask you if you are sure you want to delete. Once you confirm, your document will no longer be attached to the ticket.

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Step 6—Submitting Your Ticket

You can add any comments in the Additional Details box, if needed. Then you can submit your ticket by clicking on one of the options shown below:

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Please note that clicking Save does not save the ticket for you to edit later. It does submit the ticket same as if you click on either of the Submit buttons.

Step 6—Communication

Once you have submitted your ticket, you will receive a confirmation email. This email provides you with your ticket number, the type of ticket submitted, and which documents, if any, you attached to the ticket.



PETRequestSheet(1).xls 44 KB

SE Case 7053

Description: SE Payroll Expense Transfer Inquiry

Customer Name: Jennifer Biga Phone: +1 (719)255-3564 Email: <u>ibiga@uccs.edu</u>

We are pleased to inform you that your case has been added to the Student Employment system. Your record ID is 7053. Please retain this number for reference purposes. One of our representatives will contact you shortly.

Please do not hesitate to contact UCCS Student Employment if you have any questions, or use our Customer Portal to view more details: <u>SE Case 7053</u>.

UCCS Student Employment 1420 Austin Bluffs Parkway Colorado Springs, CO 80918 Cragmor Hall 104 719-255-3454 office 719-255-3650 fax If we review your ticket and find that we cannot process the ticket without additional information, we will send you an email requesting the information we need. The case will remain pending. The easiest way to resolve any issues is to reply to the email with the requested information. Your other option is to use the Editing a Ticket section of the Abbreviated User Guide.



Student Employment Case 7053

Dear Jennifer,

Regarding your $\underline{\text{SE Case 7053}}$, logged on 7/19/2018 11:02 AM, we have the following question or update:

Please confirm that the amount for the 6/17-6/30 PPE is only a partial payment that you are requesting be moved.

Please do not hesitate to contact UCCS Student Employment if you have any questions, or use our Customer Portal to view <u>SE Case 7053</u> for more details.

UCCS Student Employment 1420 Austin Bluffs Parkway Colorado Springs, CO 80918 Cragmor Hall 104 719-255-3454 office 719-255-3650 fax Once we have completed the request, you will receive an email confirming that we have resolved the ticket.



Student Employment Help

Jennifer Biga

Student Employment Case 7053 SE Payroll Expense Transfer Inquiry has been resolved

Student Employment Case 7053

We are pleased to inform you that your Student Employment Case 7053 has been resolved. If you believe this is in error, please reply to this email or contact UCCS Student Employment to reopen it. Otherwise, your ticket will be closed automatically in 3 business days. Resolution:

Thank you for contacting Student Employment; we have processed your PET request, and it was completed on 7/19/2018. If there is anything else we can help you with, please create a new ticket or email <u>StuEmpHelp@uccs.edu</u>.

Description of the request: SE Payroll Expense Transfer Inquiry

Please do not hesitate to contact UCCS Student Employment if you have any questions, or use our Customer Portal to view more details: <u>SE Case 7053</u>.

UCCS Student Employment 1420 Austin Bluffs Parkway Colorado Springs, CO 80918 Cragmor Hall 104 719-255-3454 office 719-255-3650 fax

Troubleshooting

If you are unable to access Cherwell, are having trouble finding the student in Cherwell, or are uncertain what ticket type to submit, you can send an email to stuemphelp@uccs.edu. This will automatically create a generic ticket. We try to process these tickets as quickly as other tickets. However, it is likely that these tickets could be delayed in processing as we may need to request additional information from you.

Student Employment Office

Student Employment is here to help. If you have questions about any step in this process, please contact Student Employment at (719) 255-3454, stuemp@uccs.edu, or visit us in Cragmor Hall Room 104.

