

# Using MyFD's Transaction Summary Report to get copies of Salary Transfers for Recertifications.

1. Enter the Budget and select the time period when the Salary transfer occurred.

2. Click the Reference number beginning with a "TX" on the salary transfer.

Account Code	Description	Transaction Date	Reference	Reference	FTE	Amount	Project Cost Accounting Task	Option	Project
01	SALARIES AND WAGES				2.40	\$15,648.55			
01-10	INSTR/RES FACULTY SAL				0.30	\$3,051.06			
01-10-01	TX:		EID 881003798	TX:02/15/2011	0.01	\$65.51			
01-10-01	TX:		EID 881003798	TX:02/28/2011	0.01	\$102.95			
01-10-01	TX:		EID 881003798	TX:03/15/2011	0.01	\$102.95			
01-10-01	TX:		EID 881003798	TX:03/31/2011	0.01	\$102.95			
01-10-01	TX:		EID 881003798	TX:04/15/2011					
01-10-01	TX:		EID 881003798	TX:04/30/2011					
01-10-01	TX:		EID 881003798	TX:05/15/2011					
01-10-01	TX:		EID 881003798	TX:05/31/2011					
01-10-01	TX:		EID 881003798	TX:06/15/2011					

3. The Salary transfer form comes up and displays all notes for the transfer.

Budget Number	Total Amount	% of Total	Trans FTE	Task	Option	Project	Position Number	Account Code/LOC	Job Class	Earn Type	Pay Period End Date	Earned Pay Period End Date
20-3755	\$205.90	3.68	0.02					01-10-01	0102	REG	03/15/2011 - 03/31/2011	03/31/2011
1. 20-3030	\$205.90	100	3.680	0.020				01-10-01	0102			
<b>Sub Total</b>	<b>\$205.90</b>			<b>0.02</b>								
<b>Transfer Total</b>	<b>\$205.90</b>			<b>0.02</b>								

Reason for the transfer and why it was charged to the wrong budget number. If effort was previously certified, explain why the effort was considered to be correct then but now requires a change.  
 The subbudget for this grant was not yet set up. Now that it has been created, we can transfer the appropriate transactions to it.  
 How did this employee's work benefit the grant budget to be charged?  
 As Co-investigator of the partnership academic affairs site, Dr. Lober will offer expertise on study designs, analysis and other scientific matters. He will participate in Protocol Team meetings, provide leadership on scientific proposals, and oversee the development of technology that will be distributed to clinical sites for project implementation.  
 Provide a complete statement that fully documents the reasons the transfer date is greater than 120 days from the original transaction date.  
 The subbudget for this grant was not yet set up. Now that it has been created, we can transfer the appropriate transactions to it.  
 Contact information (optional):  
 Notes: 0  
 Department Submitted by: wscz@u.wisc.edu 8/4/2011 8:04:41 AM  
 Prepared by: luo@u.wisc.edu 8/2/2011 2:31:21 PM  
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