

## I. INTRODUCTION

### PURPOSE

Submit information to adjust an employee's current and future payroll coding.

## II. PROCESS

STEP	SCREENSHOT
<p>1. Download an LCD Change Form from the Budget website.</p>	<p>The screenshot shows the 'University Budget and Resource Planning' website. The left sidebar contains a menu with the following items: University Budget and Resource Planning Home, Policies, Procedures &amp; Frameworks, Campus Budget Plans, President's Budget Advisory Committee, Questica Budgeting, Budget Resources (highlighted), Budget Forums, Data Warehouse Resources, Payroll Adjustments and LCD Updates (highlighted), LCD Updates, Payroll Adjustments, Forms, and Contact Us. The main content area displays the breadcrumb 'Budget Home &gt; Budget Resources &gt;', the title 'Payroll Adjustments and LCD Updates', and two sections: 'LCD Updates' and 'Payroll Adjustments'. In the 'LCD Updates' section, the text 'The <u>LCD Change form</u> is used to adjust <b>current</b> (as long as sent in and approve before the monthly LCD process) and <b>future</b> payroll postings.' has 'LCD Change form' circled in red. Below this, it states 'LCD Update forms should be submitted by the <b>20th</b> of each month to help guarantee that the update can be reviewed, approved and posted before the start of the monthly payroll process.'</p> <p><b>LCD Updates</b></p> <p>The <u>LCD Change form</u> is used to adjust <b>current</b> (as long as sent in and approve before the monthly LCD process) and <b>future</b> payroll postings.</p> <p>LCD Update forms should be submitted by the <b>20th</b> of each month to help guarantee that the update can be reviewed, approved and posted before the start of the monthly payroll process.</p> <p><b>Payroll Adjustments</b></p> <p>Payroll Adjustments are used to correct <b>current</b> (if sent in after the start of the LCD process but before soft close) and <b>past</b> payroll postings.</p> <p>Payroll Adjustment can be submitted throughout the month and will be processed as received. If it is a time sensitive adjustment (needs to be posted in the current period), please submit before <b>soft close</b>.</p> <p>If an adjustment also needs needs to continue for future months, please also submit an <u>LCD Change form</u>.</p>

2. Open LCD Change form.



University Budget  
and Planning

Labor Cost Distribution Change

**Instructions:** This form is used to change the distribution of labor cost for an existing appointment. This may be for one in employee or for all employees in a position. Please obtain Employee ID, Record Number and PeopleSoft position number from PeopleSoft. The effective date listed should be the date the labor cost distribution change will take effect. If an End Date is applicable, it will be necessary for you to submit a new Labor Cost Distribution Change form prior to the end date. If you have questions, please contact the Budget and Planning Office at 4-3926 or email [budget@sonoma.edu](mailto:budget@sonoma.edu). Please send completed form to [budget@sonoma.edu](mailto:budget@sonoma.edu).

Date:	Contact:	Phone:
HR Department Number:	HR Department Name:	

**Employee Level Change** Use this section when changing funding for one employee.

Employee Name:		
Employee ID:	Record Number:	PeopleSoft Position Number:
Effective Date:	End Date (if applicable):	

**Position Level Change** Use this section when changing funding for all employees in a particular position.

PeopleSoft Position Number:	
Effective Date:	End Date (if applicable):

**Distribution of Labor Cost** Use this section to identify funds from which this position is to be paid.

Fund	Finance Dept ID	Program*	Class*	Project/Grant*	Percentage applied to appointment
*only if applicable; not required for all appointments					<b>Total:</b> 0.00

**Unit Approval**

Appropriate Administrator:	Date:
Dean, Director:	Date:

**Financial Approval**

<input type="checkbox"/> Department	<input type="checkbox"/> Pool	<input type="checkbox"/> Position	<input type="checkbox"/> Appointment
Financial Services Director:			Date:
Keyed into PeopleSoft on:			

Revised 05/06/21

3. Fill out the following fields:

1. Date = Current date
2. Contact = Your name
3. Phone = Your phone #
4. HR Department Number = **HR department** number that employee or position resides. May be different that the payroll coding.
5. HR Department Name = Name of deptment provided in previous field

Date:	Contact:	Phone:
HR Department Number:	HR Department Name:	

4. **(Most Common)** Fill out the following fields to change a single employee's coding:

1. Employee Name
2. Employee ID
3. Record Number
4. PeopleSoft Position Number
5. Effective date = Date for change to take effect

**Employee Level Change** Use this section when changing funding for one employee.

Employee Name:		
Employee ID:	Record Number:	PeopleSoft Position Number:
Effective Date:	End Date (if applicable):	

6. (Optional) End Date = Date this coding should end.																																																	
5. <b>(Less Common)</b> Fill out the following fields to change the coding for <b>all employees in a position</b> : <ol style="list-style-type: none"> <li>1. PeopleSoft Position Number</li> <li>2. Effective date = Date for change to take effect</li> <li>3. (Optional) End Date = Date this coding should end.</li> </ol>	<div> <div>Position Level Change</div> <div>Use this section when changing funding for all employees in a particular position.</div> </div> <table border="1"> <tr> <td colspan="2">PeopleSoft Position Number:</td> </tr> <tr> <td>Effective Date:</td> <td>End Date (if applicable):</td> </tr> </table>	PeopleSoft Position Number:		Effective Date:	End Date (if applicable):																																												
PeopleSoft Position Number:																																																	
Effective Date:	End Date (if applicable):																																																
6. Fill out the following fields to update the current coding for the employee(s): <ol style="list-style-type: none"> <li>1. Required             <ol style="list-style-type: none"> <li>1. Fund</li> <li>2. Finance Dept ID</li> <li>3. Percentage</li> </ol> </li> <li>2. Optional             <ol style="list-style-type: none"> <li>1. Program</li> <li>2. Class</li> <li>3. Project/Grant</li> </ol> </li> </ol>	<div> <div>Distribution of Labor Cost</div> <div>Use this section to identify funds from which this position is to be paid.</div> </div> <table border="1"> <thead> <tr> <th>Fund</th> <th>Finance Dept ID</th> <th>Program*</th> <th>Class*</th> <th>Project/Grant*</th> <th>Percentage applied to appointment</th> </tr> </thead> <tbody> <tr><td></td><td></td><td></td><td></td><td></td><td></td></tr> <tr><td></td><td></td><td></td><td></td><td></td><td></td></tr> <tr><td></td><td></td><td></td><td></td><td></td><td></td></tr> <tr><td></td><td></td><td></td><td></td><td></td><td></td></tr> <tr><td></td><td></td><td></td><td></td><td></td><td></td></tr> <tr><td></td><td></td><td></td><td></td><td></td><td></td></tr> <tr> <td colspan="5">*only if applicable; not required for all appointments</td> <td>Total: 0.00</td> </tr> </tbody> </table> <p>Green fields = Required Yellow fields = Optional</p>	Fund	Finance Dept ID	Program*	Class*	Project/Grant*	Percentage applied to appointment																																					*only if applicable; not required for all appointments					Total: 0.00
Fund	Finance Dept ID	Program*	Class*	Project/Grant*	Percentage applied to appointment																																												
*only if applicable; not required for all appointments					Total: 0.00																																												
7. Have completed form signed by the Appropriate Administrator and dean or director. Signing via Adobe Acrobat or Adobe sign are preferred.	<div> <div>Unit Approval</div> <table border="1"> <tr> <td>Appropriate Administrator:</td> <td>Date:</td> </tr> <tr> <td>Dean, Director:</td> <td>Date:</td> </tr> </table> </div>	Appropriate Administrator:	Date:	Dean, Director:	Date:																																												
Appropriate Administrator:	Date:																																																
Dean, Director:	Date:																																																

8. Send email to [budget@sonoma.edu](mailto:budget@sonoma.edu) with a subject "LCD Change form for 'employee name'" and attach the signed LCD Change form.

LCD Change form for Shawn Taylor

University Budget and Resource Planning

LCD Change form for Shawn Taylor

Shawn Taylor  
Budget Analyst  
University Budget and Resource Planning  
Sonoma State University  
Tel. 707.664.3331 - Mobile 707.939.5455 - Fax 707.664.4000  
[Shawn.Taylor@sonoma.edu](mailto:Shawn.Taylor@sonoma.edu)  
Available for Zoom calls 8am-4:30pm M-F.  
**Please email beforehand.**

**SONOMA STATE UNIVERSITY** | **UNIVERSITY BUDGET & RESOURCE PLANNING**

LCD Change form fo Shawn Taylor.pdf (217K)

Send

9. Once adjustment has been posted you will receive an email confirmation. This may include a screenshot of the change or Funding by EE.