

WATERLOO | HUMAN RESOURCES

Change Costing Allocation Request Form Completion Instructions

1.0 Purpose

- 1.1 The purpose of this instruction is to clearly identify the steps required to effectively process a Costing Centre Allocation Change Request in a timely manner.

2.0 Scope

- 2.1 The Change Costing Allocation Request Form is for requesting a change to where an employee's or a position's salary and/or benefits are to be charged to on a go forward basis.
- 2.2 Changes to amounts that have already been paid and processed (referred to as a salary transfer) must be submitted on a Restricted Fund Salary Expense Transfer Request Form – see section 5.2.

3.0 Roles & Responsibilities

- 3.1 The Submitter shall:
- 3.1.1 Complete the Change Costing Allocation Request Form in a timely and comprehensive manner.
 - 3.1.2 Ensure the “new” cost centre(s) have been activated by Finance.
 - 3.1.3 Obtain the required approvals.
 - 3.1.4 Send the required documentation to Human Resources in a timely manner *prior* to the effective date of the change. Submission cut-off dates can be found on the Human Resources Website – see section 6.1.
- 3.2 Human Resources Payroll shall:
- 3.2.1 Review the Change Costing Allocation Request Form for completeness. Incomplete forms will be returned to the submitter. Please note that if information is missing, this will impact the timely processing of the documentation and may result in a salary transfer being required.
 - 3.2.2 Process the Change Costing Allocation Request Form in Workday

4.0 Instructions

- 4.1. Complete all fields in the top section:
- 4.1.1. Employee ID, Employee Name, Employee Job Title and position number, monthly salary, location, Supervisory Org (Name and number) and Reports to name and position number.

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- 4.2. Complete the Current Cost Allocation Section:
 - 4.2.1. Record the cost centre to which the employee’s salary is currently allocated. If additional cost centres are required, complete and attach a second form and note “2 of 2” on the top of the form.
 - 4.2.2. Include the current percentage distribution and amount being charged to each cost centre.

- 4.3. Enter the effective date of the change in the “As of effective date __/__/__ allocate as follows” field.

- 4.4. Enter the cost centre (s) to which the employee’s pay is to be distributed. If additional cost centres are required, complete and attach a second form and note “2 of 2” on the top of the form.
 - 4.4.1. Benefits will automatically be charged to the benefit cost centre related to the salary cost centre.

- 4.5. Include the percentage distribution and amount being charged to each cost centre. The total of the amounts listed should match the monthly salary given in the top section.

Note: if a percentage is not included, this will be rounded to the nearest 2 decimal places.

 - 4.5.1. If more than one cost center, please indicate the default cost center.

- 4.6. Ensure proper authorization signatures are obtained for each cost centre.
 - 4.6.1. Approvals are required from each cost centre manager
 - 4.6.2. Receive sign off from the Faculty/Department Financial Officer or Executive Officer

- 4.7. In the section below the new cost centre (s):
 - 4.7.1. Check the appropriate box to indicate whether the new allocation is to continue indefinitely (i.e. until another form is completed and submitted), OR until a given date. If the allocation is to continue until a given date, fill in the date field. Please be aware that the allocation will revert to the default cost centre assigned to the worker unless a new form is completed and submitted

- 4.8. Submit the completed form to payroll@uwaterloo.ca

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5.0 Forms & Records

5.1 [Salary Allocation Change Request Form](#)

5.2 [Restricted Fund Salary Expense Transfer Request](#)

6.0 References

6.1 [Pay Cut-off Dates](#)

7.0 Revision History

Revision Level	Description of Change	Date	Approved By
0	Document created	10-10-14	Shona Dunseith
1	Document revised to support new Workday processes	12-06-18	Rachal Fountain

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