INSTRUCTIONS FOR COMPLETING THE OSRAA LABOR DISTRIBUTION FORM
(See pg. 3 of these instructions for the payroll portion of the form)

GENERAL INFORMATION
- The OSRAA Labor Distribution Form must be completed for ALL Labor Distributions (LD’s) affecting sponsored awards, including future distributions, regardless of whether or not OSRAA approval is needed.
- Future distributions may be processed via OSCAR once the LD form is completed and authorized.
- If multiple forms are used, all signatures are required on each form.
- All LD forms must be filed in the Payroll role in Nolij unless the LD is correcting a PAR form. If correcting a PAR form, the LD form must be attached to the PAR form and filed in the Reporting role in Nolij.
- See Labor Distribution FAQs for additional information and justification examples.

JUSTIFICATION SECTION
- If the LD is to add, delete or change activity code only, indicate in justification box "activity code change only".
- If the LD is to update an individual’s payroll to a newly-created project index due to a change in budget year, indicate this in justification box.
- For all other LDs, explain why the salary was charged incorrectly to the original index and how the salary directly benefits the receiving project. If the transfer is more than 90 days after the end of the month in which the payroll charge posted, include an explanation as to why salary was not transferred in a timely manner.
- Justifications must include sufficient detail to document the circumstance of the LD and appropriateness to the new index. Justifications such as “to move salary” or “to correct an error” will not be accepted.
- If the LD will REDUCE key personnel project effort for the current project budget period by 25% or more, provide a detailed explanation as to whether this is a temporary change in effort to be made up during the project period or if it will reduce the committed effort for the overall project.
- If the LD will INCREASE key personnel project effort for the current project budget period by 25% or more, provide a detailed explanation as to whether or not this will constitute a change in the project’s scope of work.

NOTE THAT A CHANGE IN SCOPE REQUIRES SPONSOR APPROVAL REGARDLESS OF EFFORT

Example of minor change in key personnel effort (<25%):
- Proposal indicates 20% effort of key personnel
- After the proposal is awarded, key personnel effort is reduced to 16%
  Calculation: (20% - 16%) / 20% = 20% change in effort

Example of major change in key personnel effort (>25%):
- Proposal indicates 20% effort of key personnel
- After the proposal is awarded, key personnel effort is reduced to 10%
  Calculation: (20% - 10%) / 20% = 50% change in effort

Revised 3/15/2017
AUTHORIZATION SECTION

- Digital signatures are acceptable from authorized signers
- Official designee is acceptable for Dean, Director or Department Head
- E-mail from the PI is acceptable if it contains the labor distribution detail and certification statements regarding key personnel effort and change to scope of work

Approvals required on all forms:

- **Principal Investigator (PI)** – must sign **all** LD forms for sponsored awards in order to certify whether the distribution affects the scope of work or revises key personnel project effort by 25% or more. *If either of these apply, additional explanation is required – see Justification section of these instructions.*

- **Business Center/Department Authorizer** - personnel in Business Center or Department authorized to approve LDs. *Authorized signer and preparer cannot be the same individual.*

Additional Approvals that may be required:

- **Dean, Director or Department Head** – must sign all LD forms for distribution of PI salary *(a person may not authorize their own LD form)*

- **Office for Sponsored Research and Award Administration (OSRAA)** – Approval is needed for LD forms that meet any of the following criteria:
  - 90 days or more past initial payroll charge, including prior year LDs
  - revises key personnel effort by 25% or more for the project budget period
  - any change of effort that affects the project scope of work

SUBMIT OR FILE FORM

- **LD forms requiring OSRAA approval:**
  Send to OSRAA.Finance@oregonstate.edu (Include "Labor Distribution" or “LD” and employee’s name in subject line of e-mail) or to OSRAA - A312 Kerr Admin. Bldg.

- **LD forms not requiring OSRAA approval:**
  File in Nolij Payroll role, or under the Nolij Reporting role with the revised PAR form, if applicable.

If pay is redistributed after a PAR form has been signed, the PAR must be revised, recertified and filed in Nolij. See additional information provided in the Labor Distribution and Effort Reporting policies and guidelines.

See the Labor Distribution FAQs for additional information and text examples.

For questions, please contact OSRAA at OSRAA.Finance@oregonstate.edu or 7-4933.
PAYROLL INSTRUCTIONS FOR PAGE 1 OF FORM

ENTER HEADING INFORMATION
1. Enter Employee ID (do not include dashes)
2. Enter employee name (last name first)
3. Enter Position # and Suffix
4. Enter the name and phone # of the preparer

Completing the Distribution Box
1. Enter the current distribution.

2. Enter the month and year the distribution change is to start. This will change the labor distribution from this date forward. If you want to redistribute only specific months you can enter the month(s) and the word ONLY (i.e. Jan - March, 2016 only)

3. Enter Earn Code(s) for which you want to change the distribution (Note: If you want to change all earn codes, you can enter ALL instead of the Earn Code.)

4. Complete additional Labor Distribution form for Earn Codes with different distributions, or to make additional distribution changes for new time periods.

5. Enter percent, index, account code, and activity code (if needed) for the revised distribution. Complete one line for each FOPAL. Distribution must total 100%.

6. If you want amounts to display, enter the total amount. The spreadsheet will calculate the amounts for each index.

7. If you want hours to display, enter total hours. The spreadsheet will calculate the hours for each index.