

Payroll Distribution Recertification Matrix

Category	Scenario	Recertification	Reason
Sponsored	Adjustments between project, task and/or between award number, same category and same SPO number including any new PTAs under the same SPO regardless of category	No	Same segments – Due to continuation of grant or due to competitive renewal
	Adjustments more than +/-5% for an individual PTAs within/or between categories	Yes	Different funding source.
	Adjustments less than +/-5% for an individual PTAs within/or between categories	No	Tolerance set by Management
	New PTA appears after certification deadline	Yes	PTA has never been certified and needs to be reviewed and certified by PI.
Cost Sharing or Over The Cap	Adjustments between project, task, and/or award number. Same category and same SPO number.	Yes	Same funding source (Stanford funds).
	Adjustments more than +/-5% for an individual PTAs within or between categories	Yes	Tolerance set by Management
	Adjustments less than +/-5% for an individual PTAs within/or between categories	No	Tolerance set by Management
	New PTA appears after certification deadline	Yes	PTA has never been certified and needs to be reviewed and certified by PI.
Non Sponsored	Adjustments more than +/-5% for an individual PTAs between categories	Yes	Different funding source.
	Adjustments between PTAs or New PTA appears after certification deadline and adjustments are within same category.	No	Does not impact other categories. Certification is at the category level. No % change at the category level.
	Adjustments less than +/-5% for an individual PTAs within/or between categories	No	Tolerance set by Management