

# Position Funding Change

Position Funding Change eForm is used to update the funding source for a position within your department. The funding may be split between multiple funding sources and will route to the appropriate budget authority for review and approval.

1. After logging into PeopleSoft, under **Employee Self Service (Homepage)** click the **eForms Tile**. From the “eForms Portal Pagelet” select the **Create New Request** link.

View Existing Request  
**Create New Request**  
Budget Overview  
Reports

**My Requests** Personalize | Find | View All | First Prev 1 of 1 Next Last

Request ID	eForms Action	Status	Name
1 00167215	Position Attribute Change	Pending Approvals	

2. The **Initiate New eForms Request** page is displayed. From the “Action” drop down menu, select the **Position Funding Change** option.
3. The **Position Funding Change** eForm is displayed. Use the **Justification** text box to explain or “justify” the reason for the eForm action requested.

**Position Funding Change**

**Action**

Actions: Position Funding Change (circled 2) Status: (circled 3)

\*Justification

4. Modify the **Show As Of Date**, if needed. Please note this date will always default to the first of the current fiscal year. The date entered will display the position information and “as of” the date selected.

\*Show As Of: 09/01/2020 (Show Funding and Appointments from this date)

\*Position: 10020153

**Incumbents**

Empl ID	Empl Rcd	Name
6001001966		0 Paydirt, Pete

**Current Position Information**

Effective Date: 05/01/2014  
Status: Active  
Reason Code: Position Data Update  
Business Unit: UTE04 Business Affairs  
Department: 301500 PeopleSoft  
Job Code: 10405 Manager  
Job Title: Manager  
Reg/Temp: Regular  
Full/Part Time: Full-Time  
FLSA Status: Exempt  
Empl Class: Administrative / Profe  
Sal Plan: UTEP Administrative Profssnl  
Proposed Salary:   
Budgeted Amt:   
Acadm Rnk:   
FTE: 1.000000  
Std Hrs/Wk: 40.00  
Max Head Cnt: 1  
Reports To Pos: 10024078  
Reports To Name: Iris Niestas  
Reports To Email: IRNIESTAS@UTEP.EDU  
Location Code: 1  
Mail Drop ID: 00649

5. Enter or look up the position number.

**Note:** If the position is filled, the current incumbent's information will display in the **Incumbents** section.

6. The **Current Position Information** section will show position attribute data as of the “Show as of” date provided.

**Note:** This information is not editable.

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**Current Funding**

Start Date

Distribution Chartfields Project Info

Ern Cd	Cost Center	Cost Center Descr	Project	Project Descr	Date	Distrb %	Est. Expense
	30102311	ECON-JPMORGAN CHASE BANK PROF			80/31/2018	100%	

**7.** The **Current Position Information** section will show position attribute data as of the effective date provided. **Note:** This information is not editable.

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**Proposed Funding**

Start Date **8a**

Distribution Chartfields Project Info

Ern Cd	Cost Center	Cost Center Descr	Project/Grant	Project Descr	Funding End Date	Distrb %	Est. Expense
	14021600	PEOPLESFT VPIR				100.00%	<b>8b</b> <b>8c</b>
			226860067A	Hispanic Serving Institutions:	04/30/2021		

**8d**

8. In the **Proposed Funding** section update the funding source information, as needed.

8a. Verify the start date is correct.

8b. Enter the new cost center or project ID (in the respective field), add the funding end date (if applicable) and enter the distribution percentage.

8c. If adding more than one funding source click the **+** button next to **Est. Expense** column. A new line will appear, repeat step 8b.

8d. If adding an additional funding source with a different "start date" click the **+** button on the upper right corner of the **Proposed Funding** field, an additional funding section will appear. Add the start date and repeat step 8b.



## PeopleSoft Tip

When making changes to the funding source:

- **DO NOT** make any changes to lines that hold an earn code (Ern Cd), making changes may affect additional pay, supplemental pay, cell phone allowances and etc.
- The new funding source must hold sufficient funds
- The funding distribution should always equal 100%
- If using a Project/Grant, the funding start/end date must fall within the project start date.

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9. Once all the required fields have been completed, click the **Save** button.

**Notice:** At the top of the form, the **Request ID** number has been assigned and the status of the form is now “**Saved.**”

10. Expand the **Attachments** or **Comments** section to attach required documentation and include any special comments.

11. After adding any attachments and comments (if needed), click the **Submit** button.

The screenshot shows the bottom portion of a web form. The 'Attachments' section contains a table with columns: Type, Note, Attached File, Attach Date/Time, and By. Below the table is an 'Add/Delete' button. The 'Comments' section features a large text area and an 'Add/Edit' button. The 'Contact Information' section is at the bottom, containing a row of buttons: Save, Submit, Approve, Deny, CallBack, Sendback, Cancel, and Copy... Circled numbers 9, 10, and 11 point to the Save, Add/Delete, and Submit buttons respectively.

12. Once the document is submitted, the status of the form will update and show “**Pending Approvals.**” The current approval routing is displayed at the bottom of the page.

This screenshot displays the approval workflow. The 'Funding Approvals' section shows two 'Pending' items for 'REQUEST\_ID=00015861'. Each item lists 'Multiple Approvers' and 'FMS Cost Center Approver'. The 'Business Office Approvals' section shows a status of 'Awaiting Further Approvals' for 'REQUEST\_ID=00015861', with 'Not Routed' as the current status, and 'Multiple Approvers' and 'EDM' as the routing path. A circled number 12 points to the top right corner of this section.