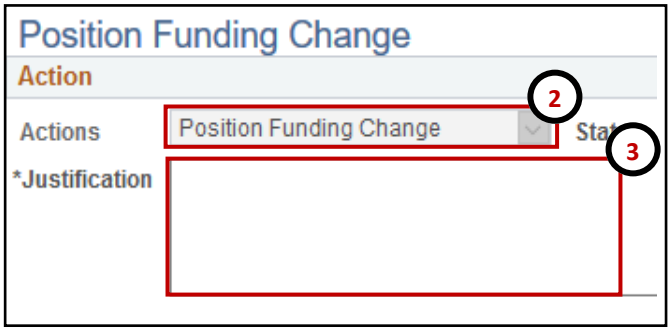
Position Funding Change

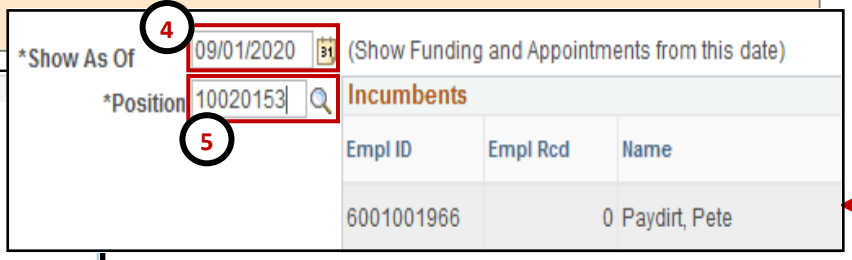
Position Funding Change eForm is used to update the funding source for a position within your department. The funding may be split between multiple funding sources and will route to the appropriate budget authority for review and approval.

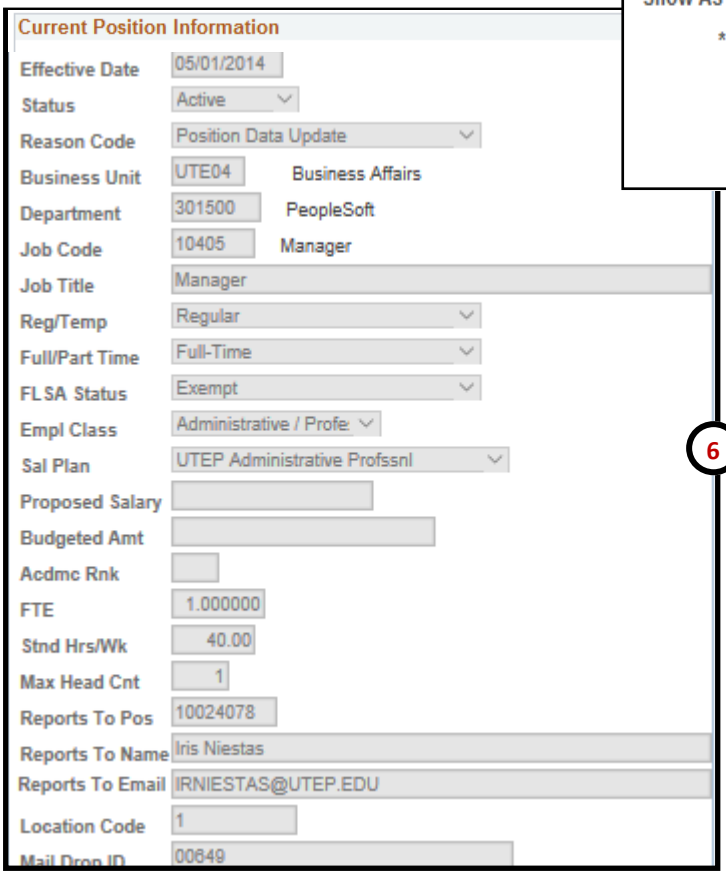
1. After logging into PeopleSoft, under **Employee Self Service (Homepage)** click the **eForms Tile**. From the "eForms Portal Pagelet" select the **Create New Request** link.

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.



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.





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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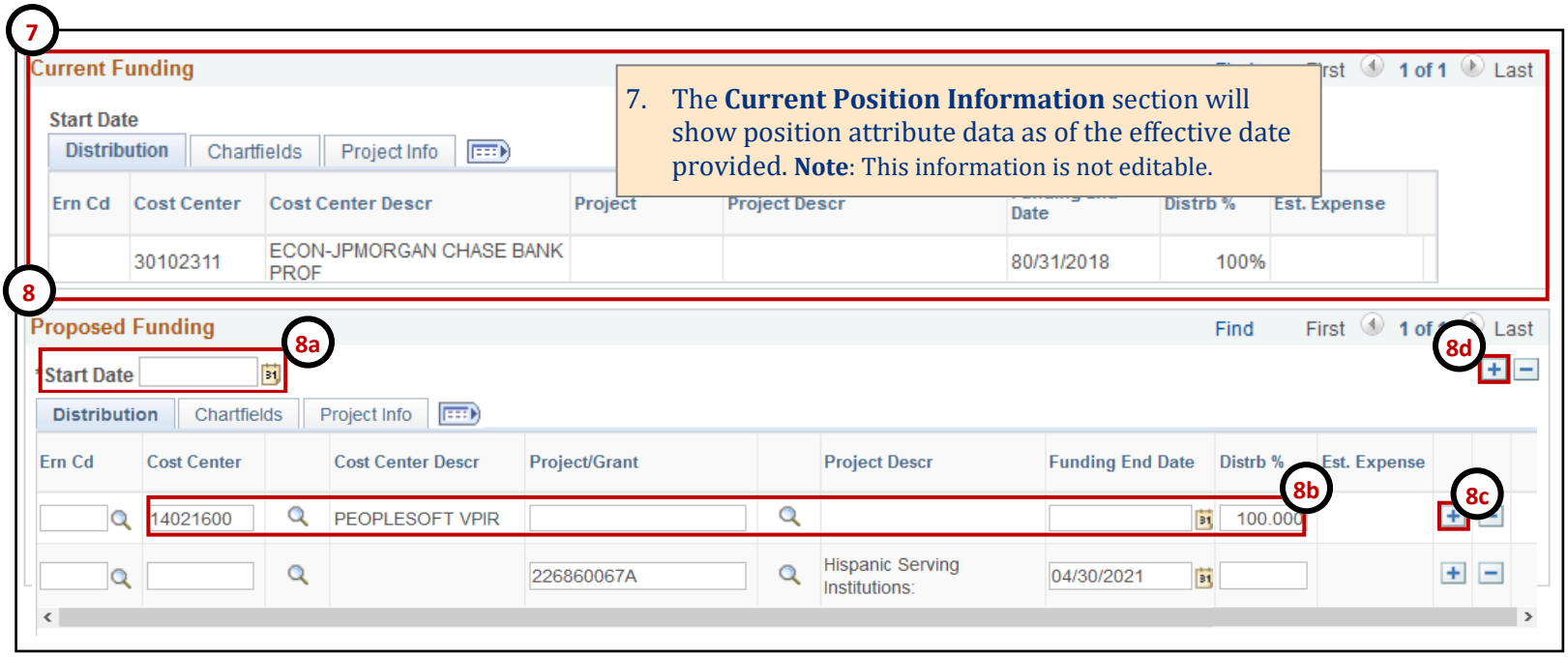

7. The **Current Position Information** section will show position attribute data as of the effective date provided. **Note**: This information is not editable.

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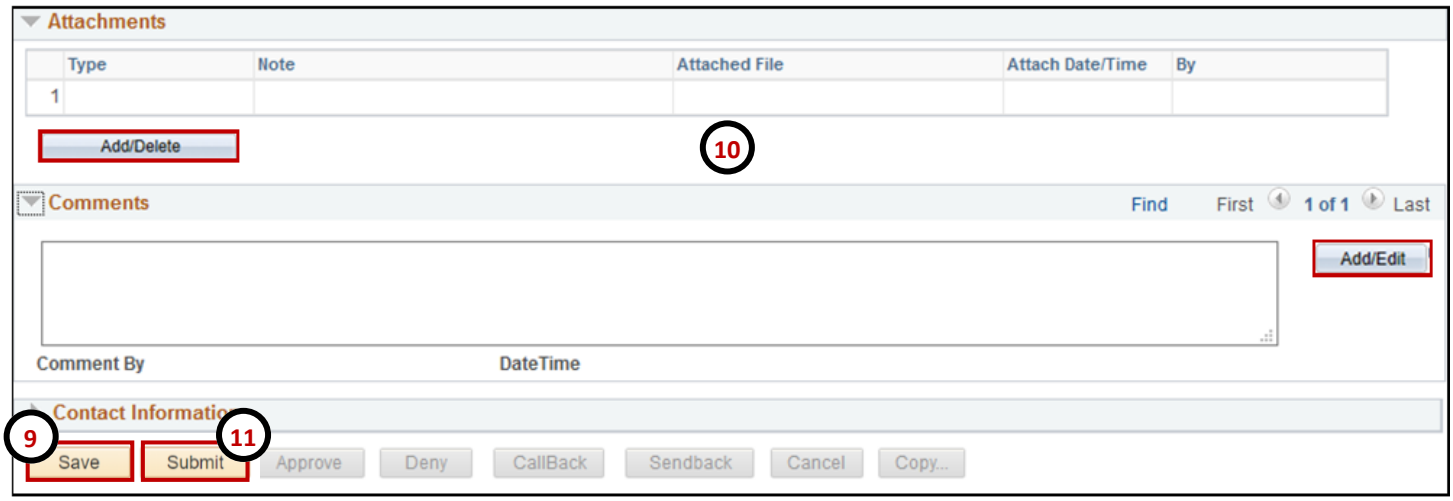
9. Once all the required fields have been completed, click the **Save** button.

   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.



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.