

Position Funding Change

This eForm is used when updating the funding source for a position within your department. 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 the home page look for the **eForms** section and select the **Create New Request** link.

The screenshot shows the 'eForms' section with a navigation menu on the left and a table of 'My Requests' on the right. The 'Create New Request' link in the menu is highlighted with a red box and a circled '1'.

Request ID	eForms Action	Status	Name
1 00015422	Termination	Completed	Paydirt, Pete
2 00015636	Retirement	Pending Approvals	Prince, Diana
3 00015422	Termination	Completed	Clark, Kent

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.

The screenshot shows the 'Position Funding Change' eForm. The 'Action' dropdown menu is set to 'Position Funding Change', and the 'Justification' text box is highlighted with a red box. A circled '2' is next to the dropdown, and a circled '3' is next to the justification box.

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.

The screenshot shows the 'Current Position Information' section. The '*Show As Of' date is set to 09/01/2018 and the '*Position' number is 10020153. Both are highlighted with red boxes and circled numbers 4 and 5 respectively. An 'Incumbents' table is also visible.

Empl ID	Empl Rcd	Name
6001001966	0	Paydirt, Pete

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 09/01/2018

Distribution Chartfields Project Info

Ern Cd	Cost Center	Cost Center Descr	Project/Grant	Project Descr	Funding End Date	Distrb %	Est. Expense
	30102311	ECON-JPMORGAN CHASE BANK PROF			08/31/2018	100.000	

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 09/01/2018

Distribution Chartfields Project Info

Ern Cd	Cost Center	Cost Center Descr	Project/Grant	Project Descr	Funding End Date	Distrb %	Est. Expense
	14021600	PEOPLESOFT VPBA				50.000	
			226860067A	Hispanic Serving Institutions:	08/31/2019	50.000	

8a

8b

8c

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 the 'Position Funding Change' form. It includes three main sections: 'Attachments', 'Comments', and 'Contact Information'. The 'Attachments' section contains a table with one row and an 'Add/Delete' button below it. The 'Comments' section has a large text area and an 'Add/Edit' button. The 'Contact Information' section contains a row of buttons: 'Save', 'Submit', 'Approve', 'Deny', 'CallBack', 'Sendback', 'Cancel', and 'Copy...'. Red boxes highlight the 'Add/Delete' button, the 'Add/Edit' button, and the 'Save' and 'Submit' buttons. Circled numbers 9, 10, and 11 are placed near the 'Save', 'Add/Delete', and 'Submit' buttons respectively.

Type	Note	Attached File	Attach Date/Time	By
1				

Buttons: Add/Delete, Add/Edit, Save, Submit, Approve, Deny, CallBack, Sendback, Cancel, Copy...

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.

The screenshot shows the 'Funding Approvals' and 'Business Office Approvals' sections. The 'Funding Approvals' section is titled 'REQUEST_ID=00015861:Pending' and shows two 'Funding Source' entries, each with a 'Pending' status, a 'Multiple Approvers' link, and 'FMS Cost Center Approver'. The 'Business Office Approvals' section is titled 'REQUEST_ID=00015861:Awaiting Further Approvals' and shows a 'Funding Change' entry with a 'Not Routed' status, a 'Multiple Approvers' link, and 'EDM' listed twice. A red box highlights the entire content area, and a circled number 12 is in the top right corner.

Funding Approvals

REQUEST_ID=00015861:Pending

Funding Source

Pending

Multiple Approvers

FMS Cost Center Approver

Funding Source

Pending

Multiple Approvers

FMS Cost Center Approver

Business Office Approvals

REQUEST_ID=00015861:Awaiting Further Approvals

Funding Change

Not Routed

Multiple Approvers

EDM

EDM