Position Funding Change

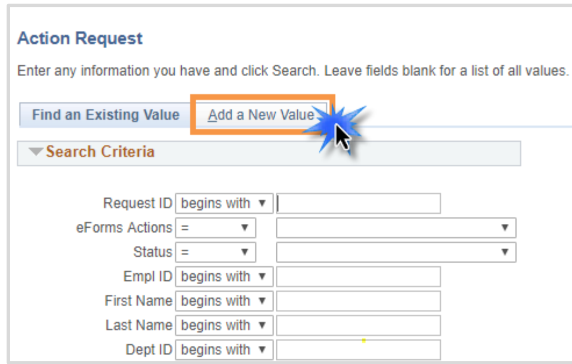
The Funding Change eForm is used to update the funding source on a position. Funding can be split between multiple Cost Centers and/or Projects. To change the funding on a position, complete the following steps:

1) In UT Share, navigate to the Action Request page

   NavBar > Menu > HRMS > UTZ Customizations > eForms for HR/Payroll Actions > Action Request

2) Click the Add a New Value tab.

3) Select the Position Funding Change Request Form

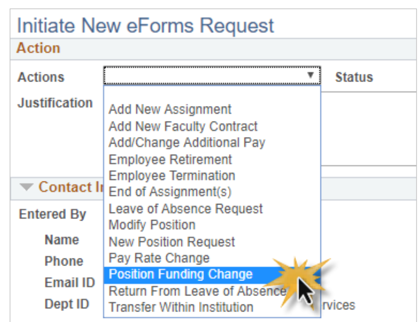


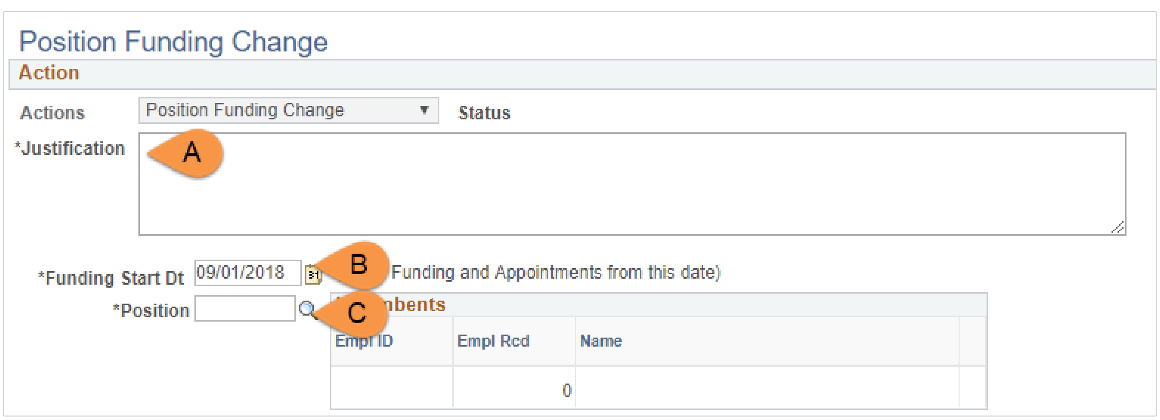
4) In the **Action** section, complete the following fields:

   A. Use the **Justification** text box to explain or justify the reason for the request. (Required)

   B. The **Funding Start Date** defaults with the beginning of the fiscal year date (e.g. 09/01/2018).

   C. Enter or lookup the **Position** number receiving the funding change. The associated table displays the employee assigned to the position (if filled).





5) The **Current Position Information** displays the position attributes.

   This information is view only. If changes are required, you must complete the **Modify Position** form.

6) Complete the Proposed Funding section.

   Use the **Proposed Funding** section to enter funding information for the new position.

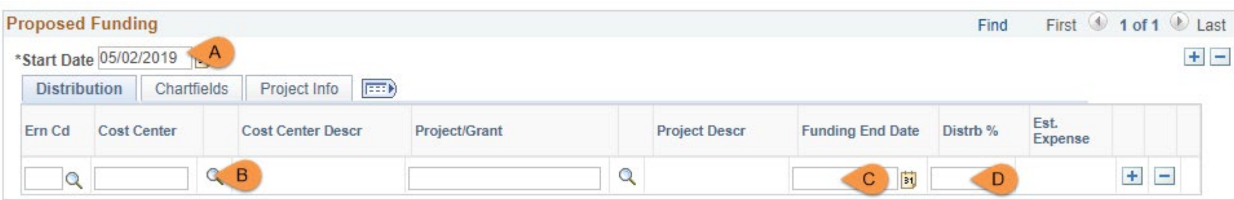
   Note: ***The Proposed Funding section should show the funding for the entirety of the fiscal year*** *(beginning September 1)* ***regardless of the effective date of the funding change****. For example, if the* *position funding change is to be effective March 1, the Proposed Funding section should show the prior funding with Start Date September 1 and a Funding End Date of February 28, then an additional Funding Period row added, with Start Date March 1.*

If the position effective date (aka the date the position was created) was within the Fiscal Year (after September 1), the Start Date should reflect the date the position was initially made effective.

Also, position funding from a Project will need to include a Funding End Date of either the end of the Fiscal Year (August 31) or the end of the Project, whichever comes first.

Enter the following fields:

A. Start Date
   Enter the effective date for the Proposed Funding in the Start Date field.
B. Cost Center, Cost Share or Project/Grant
   Enter the Cost Center, Cost Share or Project/Grant funding the position.
C. Funding End Date
   The Funding End Date for Projects or Cost Shares should be the end of the assignment, the project or fiscal year; whichever date is first. If the funding source is a Cost Center, leave the Funding End Date field blank.
D. Distribution percentage
   Enter the funding Distribution %. Funding may be split between different Cost Centers, Cost Shares or Projects. The total distribution percentage must equal 100%. Use the plus [+] or minus sign [-] to add/remove an additional funding source.



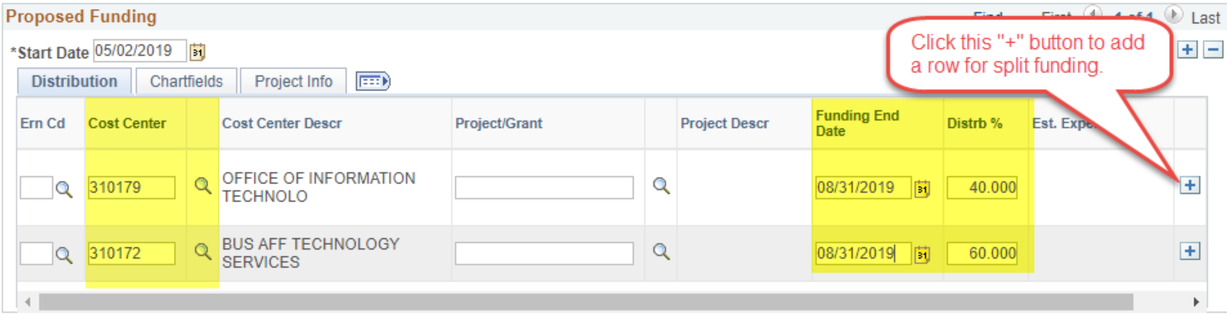
6a. Add additional or split funding

You may add split funding to the eForm by adding distribution rows and/or adding funding periods. To do so use the plus signs [+] at the end of the rows and in the upper-right corner of the Proposed Funding section.

6b. Add a Distribution Row

To enter split funding for the same time period, click the plus sign [+] in the right column of the **distribution tab** to insert a new row.

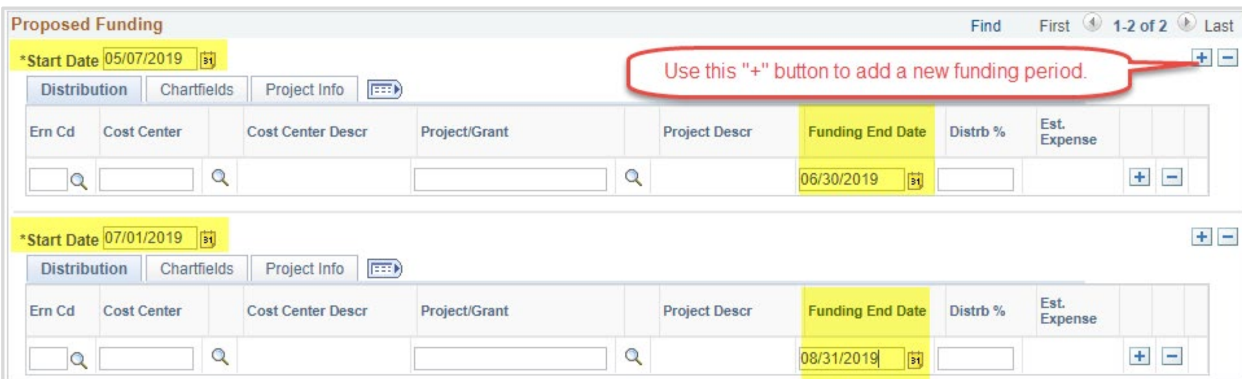
Below is an example of a 60/40 funding split for two cost centers beginning on May 2, 2019.



6c. Add a Funding Period

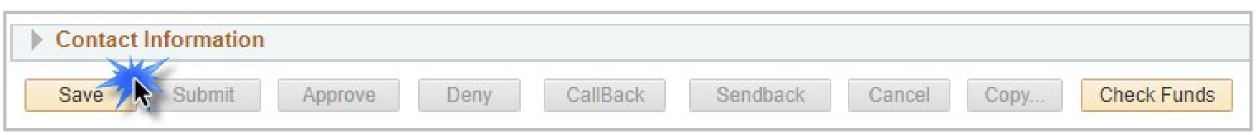
To enter funding with a different, **Start Date**, click the plus sign [+] in the upper-right corner of the **Proposed Funding** section to insert a new row.

Below is an example of Split funding over two funding periods (May/June & July/August).



7) Click Save and Review Available Funds

Once the required fields (indicated with an *asterisk) are completed, click **Save**. Once the form is saved, a **Request ID** number (e.g. 00002476) is assigned and the form status is displaying "Saved" at the top of the form.



The **Review Available Funds** page will automatically display once you have clicked save. This page is used to view the current condition of your Budget.

If the Cost Center, Cost Share or Project is overdrawn, take necessary actions to complete a budget transfer or revise the funding sources for the position on the eForm prior to submitting it. If the form is submitted with an overdrawn budget the budget office will not approve the form.

- The Requested Amount column displays the estimated expense for the current request and the estimated expenses for any other pending requests on the same cost center or project.
- Click **OK** to return to the main page of the form.

Review Available Funds

Cost Center 312345 Department Name

Request ID	Account	Account Descr	Budget	Assoc Rev	Expenses	Encumbrance	Pre-Encumb	Available Bal	Requested Amt	Current Encumb	Additional Funds	Net Balance
	A1000	Staff Salaries	1,279,745.00	0.00	-426,956.11	199,870.16	0.00	652,918.73	23,787.88	0.00	23,787.88	645,494.49
00000049	51201	SW Classified	0.00	0.00	0.00	0.00	0.00	0.00	8,181.82	0.00	8,181.82	0.00
00000046	51201	SW Classified	0.00	0.00	0.00	0.00	0.00	0.00	8,181.82	0.00	8,181.82	0.00
00000047	51201	SW Classified	0.00	0.00	0.00	0.00	0.00	0.00	7,424.24	0.00	7,424.24	0.00
	A1200	Wages	72,045.00	0.00	-84,292.05	0.00	0.00	-12,247.05	0.00	0.00	0.00	-12,247.05
	A2000	Faculty & TA Salaries	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
	A3000	Payroll Related Costs	468,853.00	0.00	-149,175.75	0.00	0.00	319,677.25	0.00	0.00	0.00	319,677.25
	A4000	Operating Expenses	1,371,885.27	0.00	-240,505.21	2,212.00	0.00	1,129,168.06	0.00	0.00	0.00	1,129,168.06
	A7000	Expense Transfers	551,275.00	0.00	-551,275.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
	Totals		3,743,803.27	0.00	-1,452,204.12	202,082.16	0.00	2,089,516.99	23,787.88	0.00	23,787.88	2,065,729.11

OK Cancel

Row colors on the Review Available Funds Page indicate the following:

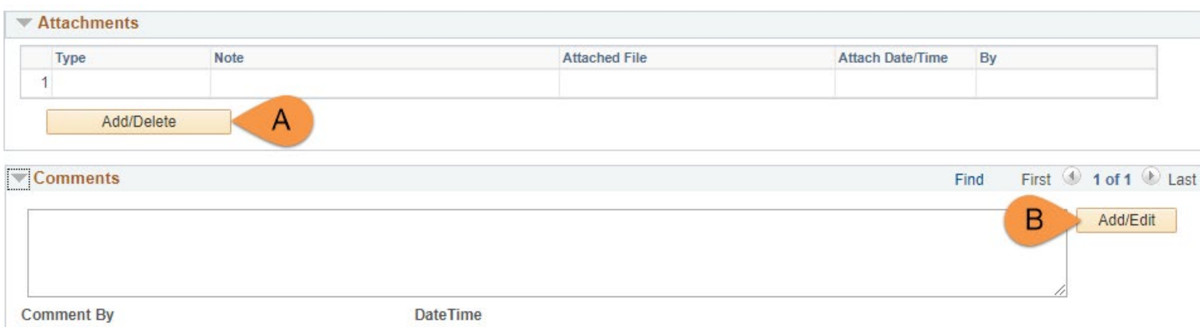
- Blue = the current eForm request
- Pink = other pending eForm requests
- Yellow = the budgetary account line is overdrawn (e.g. A1200)
- Red = overall budget is overdrawn

8) Add Attachments and Comments

  A. Expand the Attachments section and click the Add/Delete button to upload relevant support documentation.

  B. Expand the Comments section and click the Add/Edit button to include any special remarks. (Optional)

Note: Attachments and Comments cannot be added unless you have clicked Save.



9) Add a Secondary Contact (if needed) and Submit the Form to Workflow

  A. If applicable, expand the **Contact Information** section to add the name and telephone number of a secondary contact for the New Position Request form.

  B. After completing the eForm, click the **Submit** button to send the document for approval. The eForm **Status** changes to "Pending Approvals" and the current routing is displayed.