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) Begin by navigating to the Main Menu > HRMS > UTZ Customizations > eForms for HR/Payroll Actions > Action Request
   **Alternate Navigation:** From the eForms pagelet, located on the UT Share homepage, click “Create New Request”. Proceed to step three.
   **Note:** If the eForms pagelet is not appearing on the homepage, click the “Content” link, in the upper-left corner of the homepage, to add the pagelet.

2) Click the **Add New Value** tab.

3) The **Initiate New eForms Request** page is displayed. Select **Position Funding Change** from the Actions drop-down menu.

- The **Status** displays the current status of the eForm once saved and/or submitted.
- The **Request ID** number and **Request Date** are assigned once saved and/or submitted. This number may be used to identify and track the request.
- The **Processing Messages** link displays messages (i.e. warnings) received after the form has been fully processed.
- The **Request History** link provides workflow history; which includes names, dates, times and actions taken.

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., 09/01/2017).

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.

![](image)

6) The funding section displays **Current Funding** and **Proposed Funding**. Use the **Proposed Funding** section to make changes to the existing funding source(s) or distribution(s).

![](image)

a. Enter the effective date for the Proposed Funding in the **Start Date** field.

b. Enter the **Cost Center**, **Cost Share** or **Project/Grant** funding the position.

c. Enter the **Funding End Date**.

**Note:** 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. Enter the funding **Distribution %**.

**Note:** 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.

If you need 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.

7) Once the required fields (indicated with an *asterisk*) are completed, click **Save**. Notice, a **Request ID** number (e.g. 00002526) is assigned and the form status is displaying “Saved”.

8) Next, click the **Check Funds** button to view available funds for the Cost Center, Cost Share, and/or Project used in the Proposed Funding section. The **Review Available Funds** page is used to view the current condition of your Budget.

- 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.

**Note:** Currently, the **Check Funds** button is not a hard stop for the eForm request. If the Cost Center or Project is overdrawn, the form will still move forward. The end user will only receive a warning.

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**Blue** = the current eForm request  
**Pink** = other pending eForm requests  
**Yellow** = the budgetary account line is overdrawn (e.g. A1200)  
**Red** = the overall budget is overdrawn
9) Expand the **Attachments** section and click the **Add/Delete** button to upload relevant support documentation. (Optional)

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

11) If applicable, expand the **Contact Information** section to add the name and telephone number of a secondary contact for the Position Funding Change form.

12) After completing the request, click the **Submit** button to send the document for approval. The eForm **Status** changes to “Pending Approvals” and the current routing is displayed.