Budget and Financial Planning

Job Aid - Funding Change eForm

The Funding Change eForm may be used to update the funding 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.

Update the Funding for a Position
Select the eForms Tile in the Employee Self Service Landing Page and then Select Create New Request

1. Select Funding Change option from the “Actions” drop down menu.
2. The Funding Change eForm is displayed. Use the Justification text box to explain or “justify” the reason for the funding update requested.
3. The Show as of Field will default to the first of the current fiscal year. The date will display the funding and any current appointments as of that date. This date can be updated to match the exact date the funding change is to take place ensuring routing is appropriate.
4. Enter or look up the position number.  
   Note: If the position is currently filled, the current incumbent’s information will display in the Incumbents section.
5. The Current Position Information section will show position attribute data as of the effective date provided, however this information will not be editable. Always ensure the Department is correct.
6. The **Current Funding** section will display the position’s current funding as of the effective date in the **Show as of Field** at the top of the eForm.

7. In the **Proposed Funding** section, click the + button to add additional funding sources and/or start dates. The funding distribution should always equal 100%.
   a. If using a Project/Grant, the funding cannot extend past the project/grant end date.
   b. If possible, fully fund the position.

8. Once all the required fields have been completed, which is indicated by an asterisk, click the **Save** button. Notice a **Request ID** number has been assigned, with a **Status** of “Saved.”

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

10. After you have added attachments and comments, click the **Submit** button.