

## 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.**

Current Position Information	
Effective Date	06/15/2019
Status	Active
Business Unit	UTS03 VP of Business Affairs
Department	BFA003 BUDGET & FINANCIAL PLANNING
Job Code	19174 BUDGET ANALYST III
Job Title	BUDGET ANALYST III
Reg/Temp	Regular
Full/Part Time	Full-Time
FLSA Status	Exempt
Empl Class	Classified
Sal Plan	UTSA Classified
Budgeted Amt	57407.35
FTE	1.000000
Std Hrs/Wk	40.00
Max Head Cnt	1
Reports To Pos	10096717
Reports To	
Reports To Email	
Location Code	NPB
Mail Drop ID	05300
	<input checked="" type="checkbox"/> Budgeted Position

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.

**Current Funding** Find First 1-2 of 2 Last

Start Date 11/01/2020

Distribution Chartfields Project Info

Em Cd	Cost Center	Cost Center Descr	Project	Project Descr	Funding End Date	Distrb %	Est. Expense
	DEX126	OE L BROWN DIST CHR 7 ENDW EXP				100.000	

Start Date 01/01/2021

Distribution Chartfields Project Info

Em Cd	Cost Center	Cost Center Descr	Project	Project Descr	Funding End Date	Distrb %	Est. Expense
			1000003173	ENG-9639 N00014-19-1-2728-UTSA	10/31/2021	100.000	

**Proposed Funding** Find First 1-2 of 2 Last

\*Start Date 11/01/2020

Distribution Chartfields Project Info

Em Cd	Cost Center	Cost Center Descr	Project/Grant	Project Descr	Funding End Date	Distrb %
					04/30/2021	25.000
			1000003173	ENG-9639 N00014-19-1-2728-UTSA	04/30/2021	75.000

\*Start Date 05/01/2021

Distribution Chartfields Project Info

Em Cd	Cost Center	Cost Center Descr	Project/Grant	Project Descr	Funding End Date	Distrb %
			1000003173	ENG-9639 N00014-19-1-2728-UTSA	10/31/2021	100.000

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.”

**Position Funding Change**

**Action**

Actions Funding Change **Status Saved** Request ID 00193443

\*Justification changing project distribution per D [REDACTED] Request Date 03/24/2021

Show As Of 01/15/2021 (Show Funding and Appointments from this date)  Permanent Funding Change Processing Messages Request History Show Current Additional Pa Position Summary

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

▶ **Attachments**

▶ **Comments**

▶ **Contact Information**

Save Submit Approve Deny CallBack Sendback Cancel Copy... Check Funds

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