Funding Change Job Aid

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
Navigation: Main Menu > HRMS > UTZ Customizations > eForms for HR/Payroll Actions > Action Request

1. Navigate to the eForms Action Request page and click on the Add a New Value tab.
2. The Initiate New eForms Request page is displayed. Select the Funding Change option from the “Action” drop down menu.
3. The Funding Change eForm is displayed. Use the Justification text box to explain or “justify” the reason for the new eForm action requested.
4. The Funding Start Date will default to the first of the current fiscal year. The Funding Start Date will display the funding and any current appointments as of that date. This date can be updated as necessary.
5. 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.
6. The Current Position Information section will show position attribute data as of the effective date provided, however this information will not be editable.
7. The **Current Funding** section will display the position’s current funding as of the effective date provided.

8. 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. The position should also be fully funded until the end of the current fiscal year.

9. 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.”

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

11. After you’ve added attachments and comments, click the **Submit** button.