



UNIVERSITY OF CENTRAL FLORIDA PEOPLESOFT HUMAN CAPITAL MANAGEMENT SYSTEM REFERENCE GUIDE FOR APPROVERS Funding Distribution Change eForm

The Funding Distribution Change eForm should be used when a department would like to update the funding source(s) that will be used to pay an employee. The form can be used to update position or appointment level funding.

The Funding Distribution Change eForm is located on the Human Capital Management (HCM) side of PeopleSoft. Log into PeopleSoft through my.ucf.edu and then navigate to Staff Applications – Human Capital Management:

The screenshot shows the UCF Federated Identity login page with fields for NID (UCFKNIGHT) and Password, and a Sign on button. To the right is a navigation menu with categories like Academic Resources, Staff Applications, Student Self Service, Employee Self Service, Manager Self Service, Faculty/Advisor Self Service, Reporting Tools, Knights Access Login, Change my NID Password, Update my Challenge, Questions, Knights Email, UCF Home Page, and UCF COM Home Page. Further right are Staff Applications and Human Capital Management links.

Once in HCM, select "Worklist" and review your worklist to find the Funding Distribution Change eForms that are awaiting your approval. Funding Distribution Change eforms will have "FUNDCHNG" in the beginning of the link name.


The screenshot shows the Worklist page with a table of items. The table has columns for From, Date From, Work Item, Worked By Activity, Priority, and Link. Two items are listed, both with links starting with "FUNDCHNG".

From	Date From	Work Item	Worked By Activity	Priority	Link	Mark Worked	Reassign
Michael Jones	07/09/2019	Notification Worklist	Notification		FUNDCHNG_Michael Smith	Mark Worked	Reassign
Michael Jones	07/09/2019	Notification Worklist	Notification		FUNDCHNG_Tina Smith	Mark Worked	Reassign

Select the form you would like to approve by clicking the eform link. You will be taken to a new screen where you can view the form and approve it.

eForm Details

Favorites ▾ Main Menu ▾ > Department Self Service ▾ > ePAF Home Page

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Request Funding Distribution Change

Step 2 of 4: New Funding Distribution

Enter the desired distribution changes below. If the employment resource has no active position or appointment funding, then the default department will be used. Use this form to insert additional effective dates for funding, to change existing future funding, or to inactive position or appointment level funding to return to a higher funding source.

Employment Resource Details

Empl ID: 510 000 Position Number: 00032419 Admin
Empl Record: 0 Department: 16402001 CS-PAYROLL
Name: Smith, Christine eForm ID: 672278

Funding as of: 07/26/2019

Funding Distribution										
		Effective Date	Combo Code	Primary Indicator	Distrib. %	End Date	Department	Project	Fund	Valid Flag
1	Department	07/01/2018	16400074	P	100.000		16400074		10001	Y
2 *	Appointment	05/25/2019	16309006	P	100.000	01/28/2020		16309006	21088	Y

Change Funding Distribution											
	Funding Level	Effective Date	Status	Combo Code	Primary Indicator	Distrib. %	End Date	Department	Project	Fund	Valid Flag
1	Appointment ▾	07/26/2019 <input type="text"/>	Active ▾	16309006 <input type="text"/>	<input checked="" type="checkbox"/>	100.000	01/28/2020 <input type="text"/>		16309006	21088	Y

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Funding Level: This is the funding level associated with the distribution either at the appointment level or the position level.

Effective Date: The date when the new funding level will start. Multiple future effective dates can be inserted on one form.

Status: Indicates whether the funding level is active or inactive.

Combo Code: Designated funding source.

Primary Indicator: One funding account must be marked primary for each effective date in the funding distribution.

Distribution %: 100% of funding must be recorded for each effective date in the funding distribution.

End Date: Available for projects only, to indicate the end of the funding source for the employment resource.

Approving the Form

There is a section of the form titled "Change Funding Distribution" which will list the new funding distribution that your department's form originator entered.

Evaluate Funding Distribution Change

Step 1 of 2: Evaluate Funding Distribution Request

Enter the desired distribution changes below. If the employment resource has no active position or appointment funding, then the default department will be used. (HRIS Note: Instructions will be updated at a later date)

Employment Resource Details

Empl ID: 3000000 Position Number: 00038614 Instructor
 Empl Record: 0 Department: 16402001 CS-PAYROLL
 Name: Michael Smith eForm ID: 672151

Funding as of: 05/17/2019

Funding Distribution

	Effective Date	Combo Code	Primary Indicator	Distrib. %	End Date	Department	Project	Fund	Valid Flag
1	Department 07/01/2018	16400074	P	100.000		16400074		10001	Y
2	Position 05/03/2019	16100017	P	100.000		16100017		10001	Y

Change Funding Distribution

Funding Level	Effective Date	Status	Combo Code	Primary Indicator	Distrib. %	End Date	Department	Project	Fund	Valid Flag
1	Appointment 05/17/2019	Active	01018007	<input checked="" type="checkbox"/>	100.000	12/30/2020		01018007	21030	Y
2	Appointment 05/31/2019	Active	02309910	<input checked="" type="checkbox"/>	100.000	08/31/2020		02309910	21033	Y
3	Appointment 06/14/2019	Active	03420917	<input checked="" type="checkbox"/>	100.000	06/30/2099		03420917	51022	Y
4	Appointment 06/28/2019	Active	03420921	<input checked="" type="checkbox"/>	50.000	06/30/2099		03420921	51022	Y
5	Appointment 06/28/2019	Active	02200010	<input type="checkbox"/>	49.000		02200010		10001	Y
6	Appointment 06/28/2019	Active	02770502	<input type="checkbox"/>	1.000		02770502		90044	Y

Comments

Your Comment:

Comment History:

Mon, Jul 15 19, 04:48:11 PM
Approved

Tue, Jul 9 19, 11:10:15 AM

Approve Deny
Recycle
Hold

After you have completed your review of the Funding Distribution, you can make any notes regarding the eform in the “Comments” box.

To the right of the comment box, are the following four buttons:

Approve: Select this option if everything on the form appears to be okay and you do not need the originator to make any changes. If you select "Approve", then the form will move to the next step in the workflow.

Deny: Select this option if you would like to stop the form from being processed. Selecting this option will close out the form and no further action can be taken on the form. A new form would need to be created if desired.

Recycle: Select this option if you would like the form originator to make some changes to the form. You can write the changes that need to be made in the comment box to offer guidance.

Hold: This option can be selected if you would like to place the form on hold with a comment on it while you reach out to someone else for additional information. You can return to the form later to process it as it will remain on your work list.

Select the appropriate action to move the eForm to the next action.

Routing the eForm

After the form has been approved, you will be taken to a confirmation screen.

A process visualizer will show you where the eform is located in the approval workflow.

Favorites - Main Menu - Worklist - Worklist

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Evaluate Funding Distribution Change

Step 2 of 2: Evaluation Complete

Enter the desired distribution changes below. If the employment resource has no active position or appointment funding, then the default department will be used. (HRIS Note: Instructions will be updated at a later date)

Form Status

eForm ID: 672148

You have just AUTHORIZED this form. This action passed the form to the SYSTEM for further processing.

Process Visualizer

1: (1 hour 9 minutes) > 2: GT Budget Dept Approver > 3: GT Department Research Coord > 4: GT Budget Approver (31 days 4 hours 22 minutes) > 5: GT Regional Campuses > 6: GT Financial Aid > 7: GT Office of Research > 8: GT Faculty Cluster > 9: Integration Broker > 10: System

Go To Worklist
View This Form
Go To ePAF Home Page
Close This Form

Note that this reference guide is meant to supplement, not replace the PSC105 – Funding Distribution Change eForm course for Approvers.

If you have questions regarding the Funding Distribution Change eform, please email HRIS@ucf.edu. Thank you!