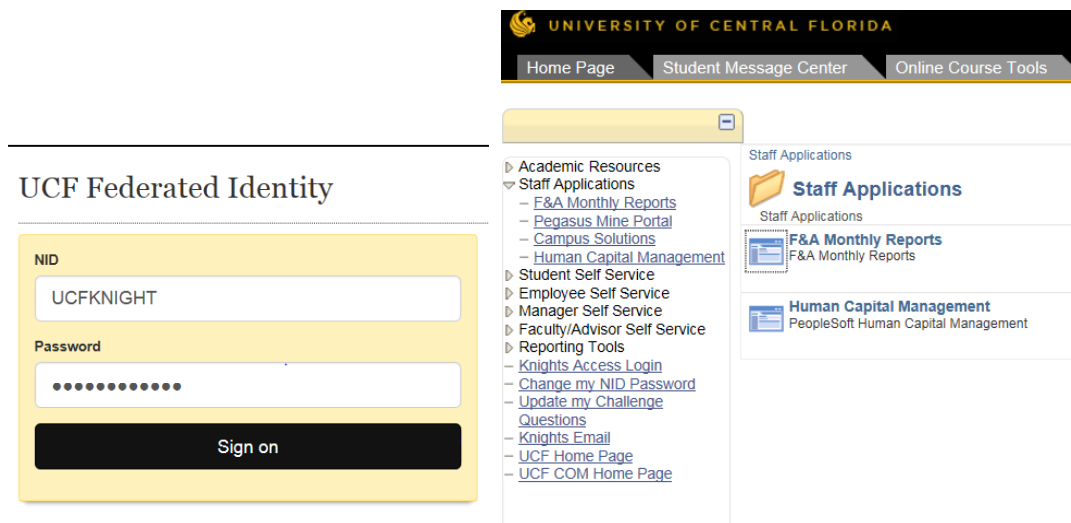




UNIVERSITY OF CENTRAL FLORIDA PEOPLESOFT HUMAN CAPITAL MANAGEMENT SYSTEM REFERENCE GUIDE FOR ORIGINATORS Funding Distribution Change eForm

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.

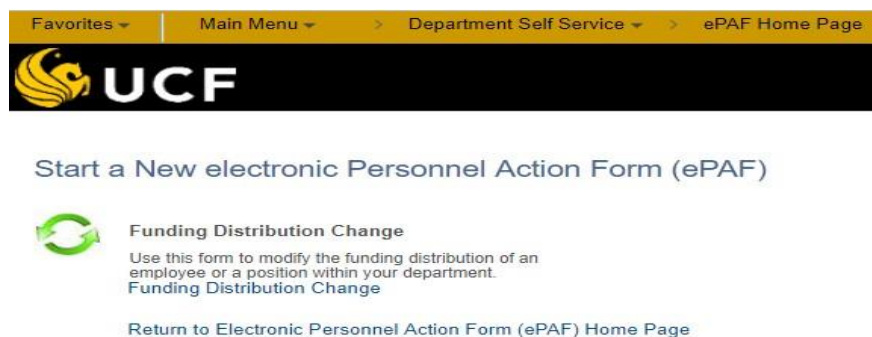
The Funding Distribution Change eForm is located on the Human Capital Management (HCM) side of PeopleSoft. Log into PeopleSoft through my.ucf.edu and then navigate to Staff Applications – Human Capital Management:



The eForm is available through the ePAF Home Page. Once in HCM, use the Main Menu, select Department Self Service, then ePAF Home Page. From this page you will be able to create, modify, view and/or approve any HCM eForms and ePAFs available to you.

Create a Funding Distribution Change eForm

Navigate to the ePAF Home Page, click on “Start a New ePAF” and then select the “Funding Distribution Change” link.




Enter the Effective Date of the funding change and the employment resource details (Employee ID and Employee Record # or vacant position #) and click Search.

The search results will display all potential distributions as of the effective date that you entered for that particular employment resource. A "*" symbol is used to indicate which funding distribution is being used for this employment resource.

Click "Next>>" to edit the funding information.

[Favorites](#) > [Main Menu](#) > [Department Self Service](#) > [ePAF Home Page](#)



Request Funding Distribution Change

Step 1 of 4: Choose Employment Resource for Distribution

Enter the effective date of the distribution change. For current employees, enter an Employee ID and Employee Record and click Search. For vacant positions, click search. The funding as of the effective date for the chosen employment resource will appear below the search button. The star indicates the budget level currently being used.

Search Fields

*Effective Date: eForm ID 672278

Empl ID:


Empl Rcd:

OR

Vacant Position:

Funding Distribution										
Personalize Find First 1-2 of 2 Last										
		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 *	Appointmnt	05/25/2019	16309006	P	100.000	01/28/2020		16309006	21088	Y

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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: 510000 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										
Personalize Find First 1-2 of 2 Last										
		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 *	Appointmnt	05/25/2019	16309006	P	100.000	01/28/2020		16309006	21088	Y

Change Funding Distribution										
Personalize Find First 1 of 1 Last										
Funding Level	Effective Date	Status	Combo Code	Primary Indicator	Distrib. %	End Date	Department	Project	Fund	Valid Flag
1	Appointmnt	07/26/2019	Active	16309006	100.000	01/28/2020		16309006	21088	Y

Create or modify future distribution rows as needed. All available fields must be completed.

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

Effective Date: Carries forward from the search page. You can insert multiple future effective dates on one form.

Status: Change to inactive if you wish to default to a higher funding level.

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.

+ or -: Use to insert or remove rows from the funding distribution.

Once you've made all necessary changes, Click "Next>>."

Review the details entered on the prior screen, add any necessary attachments or comments and submit.

Request Funding Distribution Change

Step 3 of 4: Review Funding Distribution Details

Confirm the details entered on the prior page, and add any necessary attachments and comments prior to submitting.

Employment Resource Details

Empl ID: 5100000 Position Number: 00032419
Empl Record: 0 Department: 16402001 CS-PAYROLL
Name: Smith, Christine eForm ID: 672308

Funding as of: 07/28/2019

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

New Funding Distribution											
	Funding Level	Effective Date	Status	Combo Code	Primary Indicator	Distrib. %	End Date	Department	Project	Fund	Valid Flag
1	Appointment	07/28/2019	Active	16309006	P	50.000	01/28/2020		16309006	21088	Y
2	Appointment	07/28/2019	Active	16402001		50.000		16402001		10001	Y

Comments

Your Comment:

View a Funding Distribution Change eForm

Navigate to Main Menu > Department Self Service > ePAF Home Page

To view an eForm submitted within the last 30 days, click the “View an ePAF” link. To view older eforms, use the “Look Up an Archived ePAF”.

Electronic Personnel Action Form (ePAF) Home Page

- My Worklist**
Work the items that have been routed to you.
- Start a New ePAF**
Start a new ePAF, which will then be routed to the appropriate approvers.
- Resubmit, Change, or Withdraw an ePAF**
Make changes to an ePAF that has been recycled or needs to be updated. Only forms that have not had final approval or been processed into the system will be accessible.
- View an ePAF**
View a recently submitted ePAF, including information about its handling so far. ePAFs submitted in the last month are listed here. This is a read-only view.
- Look Up an Archived ePAF**
Find and review an old ePAF. ePAFs submitted more than a month ago will be listed here. This is a read-only view.

Select “View a Funding Distribution Change eForm”.

Enter your search parameters and then click Search.

When reviewing the ePAF, the process visualizer reflects where in the approval process workflow the form currently sits. Use the “*Who can work this form?*” link to validate who has the ability to approve the form.

View Funding Distribution Change

Step 2 of 2: Form History

This page has a history of all the actions that have been taken on the form, and what actions are pending, if any.

Form Information

eForm ID	672309
Form Status	Pending
Form Type	FUNDCHNG Funding Distribution Change
Condition	DEFAULT Default
Next Approver	GT Dept Research Coord
	Who can work this form? Form Messages

Process Visualizer

1: Budget Originator → 2: GT Budget Dept Approver → 3: GT Department Research Coord → 4: GT Budget Approver → 5: GT Regional Campuses → 6: GT Financial Aid → 7: GT Office of Research → 8: GT Faculty Cluster → 9: Integration Broker → 10: System

Transaction / Signature Log

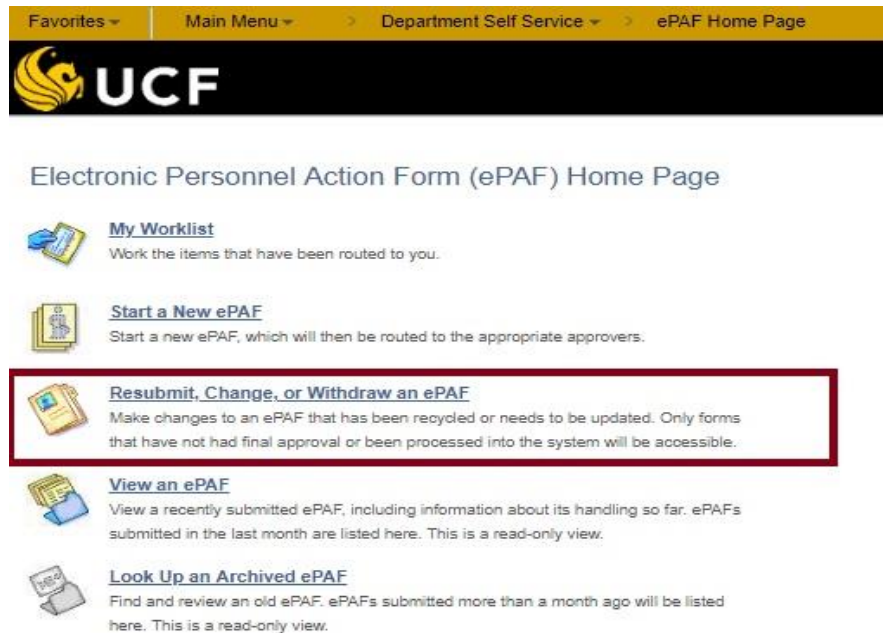
Current Date/Time	Role Name	User ID	User Description	Action	Status
1 08/05/2019 11:24:01AM	GT Budget Originator		Budget Originator	Submit	Pending

<< Previous

Making Changes to Existing Funding Distribution Change eForm

To edit your submission, select “Resubmit, Change, or Withdraw an ePAF”, make the necessary changes and resubmit the form for approval.

You will not be able to edit forms that have already been fully approved by everyone in the approval workflow. You would need to start a new form to make the corrections.



UCF

Electronic Personnel Action Form (ePAF) Home Page

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Note that this reference guide is meant to supplement, not replace the PSC104 – Funding Distribution Change eForm course for Originators.

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