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# Funding Changes

## PROCESS OVERVIEW

The purpose of this reference guide is to provide an overview of Funding Changes in the Manager Self Service (MSS).

All department processes for funding changes remain the same. This electronic process replaces the manual paper approvals.

**Funding Change workflow should be initiated only upon completion of department and College or VP area business practices. This electronic workflow does not replace internal department approval steps for the action.**

This workflow creates a standard efficiency with increased notification to document department or area requests for updates. For example: If Department A business process previously required approval from Budget Admin X and VP #3 be completed prior to submitting the paper funding change request; all approvers in the workflow trust those steps/business processes will have been completed prior to this workflow being initiated.

### Where do I go?

**hcm.bgsu.edu** (for Budget Admins)

**OR**

MyBGSU > Employees > Manager Information > Manager Dashboard

(for Supervisors/Managers)

### NAVIGATION

**Option 1: Budget Admins**

- Type [hcm.bgsu.edu](http://hcm.bgsu.edu) in the address bar of your browser.

- Enter **User ID** and **Password** and click on **Sign In**

- Click on Main Menu, BGSU Menu, Human Resources, Funding Change AWE and then one of the Funding Change options.
Option 2: Supervisors/Managers

- Type bgsu.edu in the address bar of your browser.
- Click on MyBGSU
- Enter User ID and Password and click on LOGIN

- Click on Employees
- Scroll down to the Manager Information section and click on Manager Dashboard

- You can get to the Funding Change options from the Quick Links in Manager Dashboard

- Student employee changes begin on page 5
- Faculty/Staff changes begin on page 9
Use the Bread crumb menu in the orange section at the top of the page when moving around. **Do not** use the browser Back button.
**FUNDING CHANGE REQUEST - STUDENTS**

**EMPLOYEE SELECTION**

Click on the orange Select button beside the name of the student that has a funding change.

**OR**

- If you have a long list of employees, it will be quicker to click on the link to Find Employee.
- The Find Employee window will allow you to filter/search on many different fields.

*Feature only available to Managers. The Budget Admins will need to use the browser search to find an employee in the list.*
EFFECTIVE DATE

Choose the Effective Date. Select the pay period beginning date that the change takes effect, normally on a Sunday for Student Employees.

This Funding Change Request cannot be used for graduate assistants, those changes need to be made through the Graduate Contract Application which is available in the MyBGSU menu.

Compensation will not show for employees with an appointment. Only employees with a position will show compensation.

Clicking on any text with a triangle beside it (like Instructions in the screen shot above) or with a dotted underline (like About the Effective Date) will provide additional information that may assist you with the process.
**CURRENT VALUES**

The Current Values for funding distribution for the employee are shown near the bottom of the screen.

**NEW VALUES**

Select **Department** if source of support is 100% the home department operating fund with no program codes. Ex: Department #, fund 10000 or 10000OP -

Select **Appointment** if support source is:

a. Home department from a fund other than operating
b. Home department, any fund and a program code
c. Different from home department, with or without program codes
d. Shared support between departments, grant and department, or Federal Work Study
e. Grant supported

With questions, please contact Student Employment Services at stuemp@bgsu.edu or 419-372-2865.

**About the End Date**

The End Date is optional. Funding will be inactivated on the first day after the End Date, if an End Date is entered. The End Date must be greater than the Effective Date.
When Choosing Appointment:

- Enter the Combination Code or click on the magnifying glass to search for the correct code.
- If you want to add an additional funding source, click on the + sign to add another row.
- Adjust the Distribution percentages so that all funding totals to 100%.
- It is optional to type in a comment explaining the funding change. Make sure to keep this short and professional. There is an icon to the right of the comment box to run a spell check.

Below the Current Data box, Check the box to confirm that you have discussed this funding change with all appropriate individuals.

Click the Submit button.

In this example, the Reviewers will be sent a notification message only, they do not need to approve the change.

Payroll needs to grant the final approval.

If this employee were being paid by Federal Work Study (FWS) this would go to Student Employment Services instead of Payroll for the final approval.
CREDENTIALS

Login: Your Employee Number
Password: Your Employee Number (same as login)

(Employee names and locations are placeholders and will need to be replaced with actual names and locations)

Click on the orange Select button beside the name of the employee that has a funding change.

OR

- If you have a long list of employees, it will be quicker to click on the link to Find Employee.
- The Find Employee window will allow you to filter/search on many different fields.

Feature only available to Managers. The Budget Admins will need to use the browser search to find an employee in the list. (Ctrl+F)
Funding Changes

**EFFECTIVE DATE**

Choose the Effective Date, Select the pay period beginning date that the change takes effect.

Compensation will not show for employees with an appointment. Only employees with a position will show compensation.

Clicking on any text with a triangle beside it (like Instructions in the screen shot above) or with a dotted underline (like About the Effective Date) will provide additional information that may assist you with the process.

**CURRENT VALUES**

The Current Values for funding distribution for the employee are shown near the bottom of the screen.
Funding Changes

NEW VALUES

Select **Department** if source of support is 100% the home department operating fund with no program codes. Ex: Department #, fund 10000 or 100000OP.

Select **Position** only if funded by a source other than Home Department.

Contact the Payroll Office with any questions at payroll@bgsu.edu or 419-372-2201.

When Choosing **Position**:
- Enter the Combination Code or click on the magnifying glass to search for the correct code.
- If you want to add an additional funding source, click on the + sign to add another row.
- Adjust the Distribution percentages so that all funding totals to 100%.
- It is optional to type in a **comment** explaining the funding change. Make sure to keep this short and professional. There is an icon to the right of the comment box to run a spell check.

Below the Current Data box, **Check the box** to confirm that you have discussed this funding change with all appropriate individuals.

Click the **Submit** button.

About the End Date

The End Date is optional. Funding will be inactivated on the first day after the End Date. If an End Date is entered, the End Date must be greater than the Effective Date.

By completing and submitting this Funding Change Request Form, I am confirming that I have discussed this funding change with all appropriate individuals.
Funding Changes

Here you will see the Funding Change Approval Workflow.

VIEW FUNDING CHANGE STATUS

Navigation to the Funding Change View

- Click on Employee's name to view details.

If any of your funding changes are not approved and are pushed back to you, use the Funding Change Approval option to make changes and resubmit.

Those Funding Changes that are Denied, cannot be changed and resubmitted.
• At the bottom of the screen, you will see the Funding Change Approval Workflow. Clicking on the arrow beside the Comments will expand the comments entered.
• You cannot make changes from this screen. You will need to go to the Approval options to make changes and resubmit.
• Click on the Return to select Employees link when finished viewing.

FUNDING CHANGE APPROVAL/REWORK

Use the Funding Change Approval option to make changes and resubmit if any of your funding changes are not approved and are pushed back to you.

Click on the employee name to view details and to process the approval.

Approve Funding Change
The list below contains funding change requests requiring your approval. Select on an employee to view details and to process the approval.

<table>
<thead>
<tr>
<th>Name</th>
<th>Request Date</th>
<th>Workflow Status</th>
<th>Transaction Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Abigail Robin</td>
<td>06/05/2016</td>
<td>Rework</td>
<td>1</td>
</tr>
</tbody>
</table>
**FUNDING CHANGE PUSHBACK**

- Make funding changes in the New Values box.

- Add a Comment explaining the change
- Click on Resubmit

A Confirmation message appears after you select Resubmit.