Funding Changes

PART OF MANAGER DASHBOARD
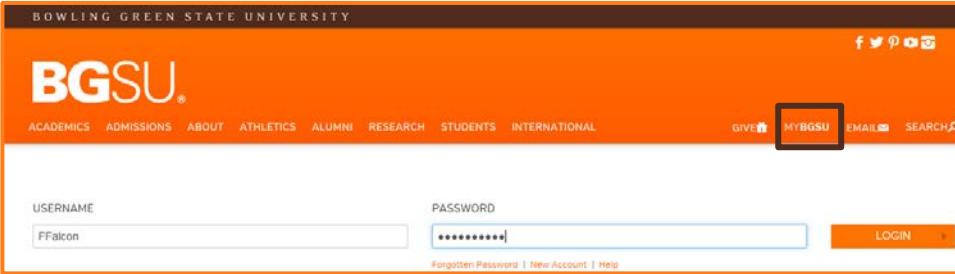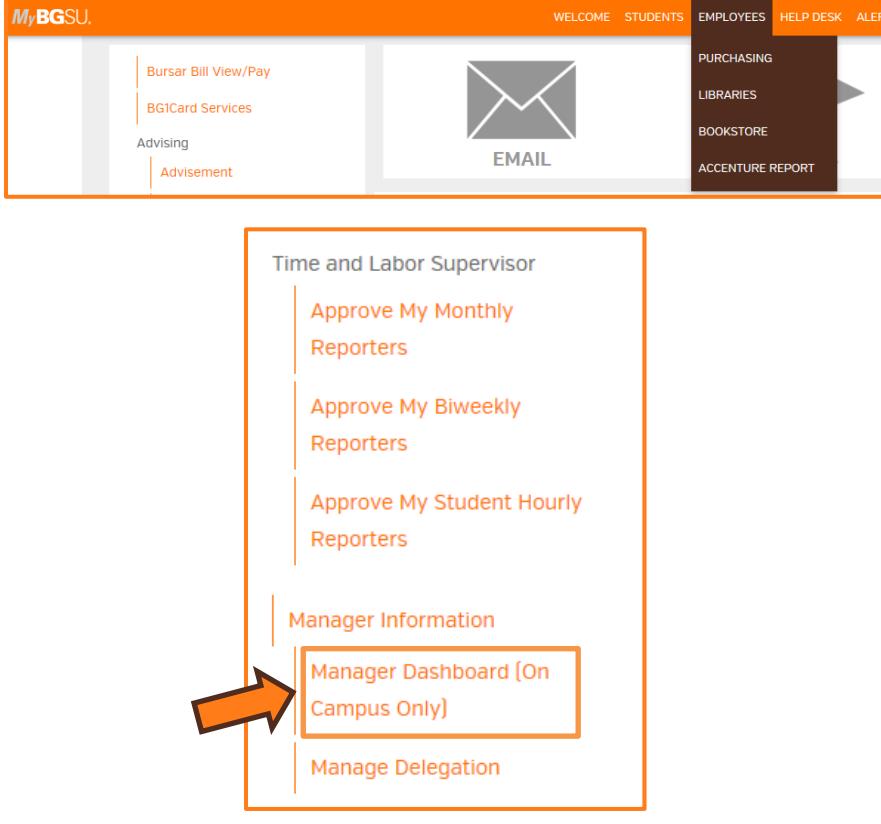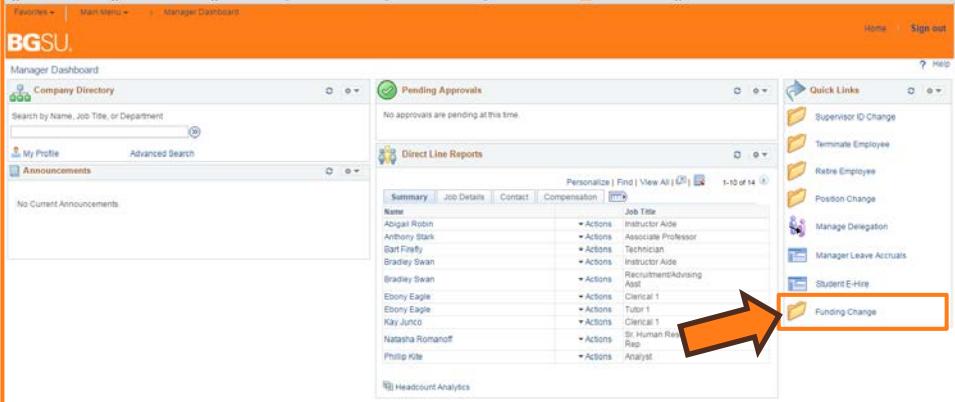
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Funding Changes

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** 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.	 **BGSU** **BGSU HCM Sign-in** PeopleTools: 8.54 Authentication: ldapprod User ID FFALCON Password •••••••••• Sign In For assistance, please contact the Technology Support Center at 419-372-0999 or via live chat here. Favorites ▾ | Main Menu ▾ **BGSU** BGSU Menu — Human Resources — Funding Change AWE — Funding Change Request Company Directory — Benefits — Employee Fee Waiver R — Funding Change Approval Self Service — PeopleTools — Dependent Fee Waiver — Funding Change View Manager Self Service — Student E-Hire Enterprise Components

|	
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 Changes

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.

Funding Change Request

Abigail Robin

▼ Instructions

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

New Values

*Effective Date ___	About the Effective Date Fiscal Year
○ Department	○ Appointment
Department 115200	Family & Consumer Sciences
Job Code S32004	Instructor Aide
Comments	

Current Values

Effective Date   06/12/2016   Fiscal Year 2016
○ Department   ● Appointment

Current Distribution

	Combination Code	Description	Fund	Dept ID	Description	Distribution %
1	115200FA	Family & Consumer Sciences	15000	115200	Family & Consumer Sciences	25.000
2	115200OD	Family & Consumer Sciences	18600	115200	Family & Consumer Sciences	75.000

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

Submit

About the Effective Date

Select the pay period beginning date that the change takes effect.

For monthly employees the date should normally start on the first of the month.

For bi-weekly employees the date should normally start Sunday.

Clicking on any text with a triangle beside it (like Instructions in the screen shot above) or with a dotted underline (like About the Effected 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 Change Request

Abigail Robin
▶ Instructions

New Values

*Effective Date	📅 About the Effective Date Fiscal Year

◉ Department   ○ Appointment

Department 115200   Family & Consumer Sciences
Job Code S32004   Instructor Aide

Comments [ ] 🔲

Current Values

Effective Date 07/01/2015   Fiscal Year 2016
○ Department   ◉ Appointment

Current Distribution

	Combination Code	Description	Fund	Dept ID	Description	Distribution %
1	115200OD	Family & Consumer Sciences	18600	115200	Family & Consumer Sciences	100.000

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

[Submit]

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 **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.

New Values

There are future dated rows on the Department Budget table for this employee.

*Effective Date	06/05/2016 📅 About the Effective Date Fiscal Year 2016
End Date	📅 About the End Date Fiscal Year

○ Department   ◉ Appointment

Department 115200   Family & Consumer Sciences
Job Code S32004   Instructor Aide

Distribution

	*Combination Code	Description	Fund	Dept ID	Description	*Distribution %
1	115200OD 🔍	Family & Consumer Sciences	18600	115200	Family & Consumer Sciences	100.000 ➕ ➖

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.	**New Values** There are future dated rows on the Department Budget table for this employee. *Effective Date 06/05/2016 About the Effective Date Fiscal Year 2016 End Date About the End Date Fiscal Year ○ Department ● Appointment Department 115200 Family & Consumer Sciences Job Code S32004 Instructor Aide **Distribution** |	*Combination Code	Description	Fund	Dept ID	Description	*Distribution %	
---	---	---	---	---	---	---	---
1	115200OD	Family & Consumer Sciences	18600	115200	Family & Consumer Sciences	75.000	+ −
2	115200FA	Family & Consumer Sciences	15000	115200	Family & Consumer Sciences	25.000	+ −	 Comments: TEST - Changing Funding on Student Employee
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.	☑ By completing and submitting this Funding Change Request Form, I am confirming that I have discussed this funding change with all appropriate individuals. Submit
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.	**Submit Confirmation** ✓ You have successfully submitted the Funding Change request (Transaction# 13) for Abigail Robin as of 6/20/2016. **Funding Change Approval** ▼ :Pending 💬 View/Hide Comments Funding Change Workflow **Self Approved** ✓ Funding Change Originator 06/20/16 - 10:48 AM **Reviewer** 👓 Reviewer **Pending** 🕐 Multiple Approvers Payroll Approvers **Reviewer** 👓 Reviewer ▶ **Comments** Return to Select Employees
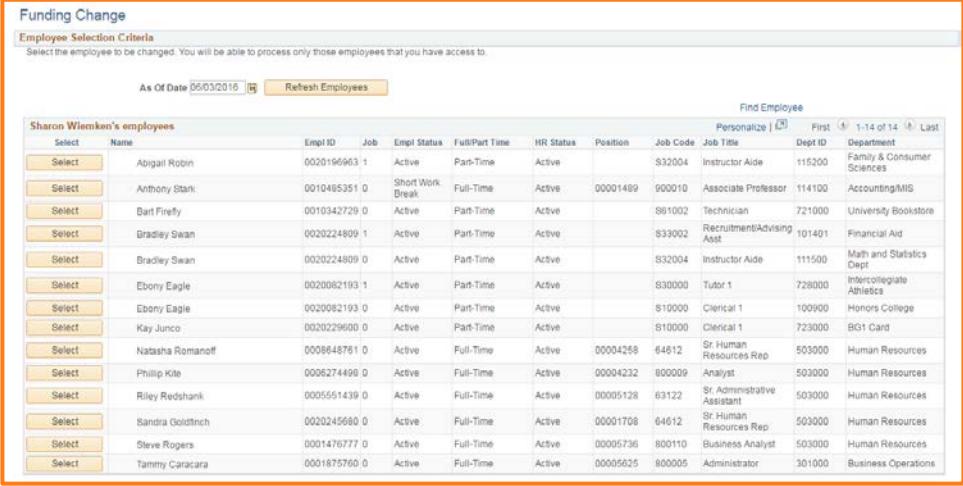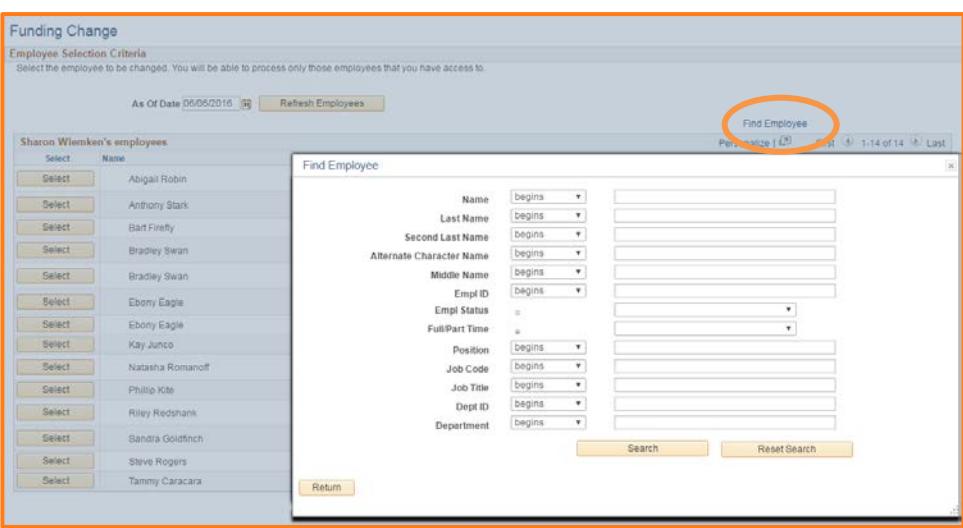
FUNDING CHANGE REQUEST – FACULTY/STAFF	
EMPLOYEE SELECTION Click on the orange Select button beside the name of the employee that has a funding change. OR	
• If you have a long list of employees, it will be quicker to click on the link to **Find Employee**. • The Find Employee window will allow you to 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)*	

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.

Funding Change Request

Phillip Kite

▼ Instructions

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.

New Values

	*Effective Date		About the Effective Date	Fiscal Year
◉ Department			○ Position	
Department	503000		Human Resources	
Position Number	00004232		Classification/Compstn Analyst	
Job Code	800009		Analyst	
Compensation Rate				
Comments				

Current Values

Effective Date	07/01/2015	Fiscal Year	2016
◉ Department			

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

Submit

* Required Field

Return to Select Employees

About the Effective Date

Select the pay period beginning date that the change takes effect.

For monthly employees the date should normally start on the first of the month.

For bi-weekly employees the date should normally start Sunday.

Clicking on any text with a triangle beside it (like Instructions in the screen shot above) or with a dotted underline (like About the Effected 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 Change Request

Phillip Kite

▼ Instructions

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.

New Values

	*Effective Date		About the Effective Date	Fiscal Year
◉ Department			○ Position	
Department	503000		Human Resources	
Position Number	00004232		Classification/Compstn Analyst	
Job Code	800009		Analyst	
Compensation Rate				
Comments				

Current Values

Effective Date	07/01/2015	Fiscal Year	2016
◉ Department			

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

Submit

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.

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.

Funding Change Request

Phillip Kite
▶ Instructions

New Values

Based on the entered date(s), this request will be a retroactive funding change request and it will require manual processing by Payroll.

*Effective Date 06/01/2016	About the Effective Date Fiscal Year 2016
End Date	About the End Date Fiscal Year
○ Department	◉ Position
Department 503000	Human Resources
Position Number 00004232	Classification/Compstn Analyst
Job Code 800009	Analyst
Compensation Rate	

Distribution

	*Combination Code	Description	Fund	Dept ID	Description	*Distribution %	
1							➕ ➖

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.

Funding Change Request

Phillip Kite
▼ Instructions
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.

New Values

Based on the entered date(s), this request will be a retroactive funding change request and it will require manual processing by Payroll.

*Effective Date 06/01/2016	About the Effective Date Fiscal Year 2016
End Date	About the End Date Fiscal Year
○ Department	◉ Position
Department 503000	Human Resources
Position Number 00004232	Classification/Compstn Analyst
Job Code 800009	Analyst
Compensation Rate	

Distribution

	*Combination Code	Description	Fund	Dept ID	Description	*Distribution %	
1	503000OP	Human Resources	10000	503000	Human Resources	80.000	➕ ➖
2	316000OP	Information Technology Service	10000	316000	Information Technology Service	20.000	➕ ➖

Comments: TEST - Changing Funding on Staff Employee

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.

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

[Submit]

Here you will see the Funding Change Approval Workflow.	**Submit Confirmation** ✔ You have successfully submitted the Funding Change request (Transaction# 14) for Sandra Goldfinch as of 6/20/2016. **Funding Change Approval** ▼ :Pending ⟲View/Hide Comments Funding Change Workflow **Self Approved** → **Pending** → **Not Routed** → **Not Routed** → **Not Routed** ✔ Funding Change Originator 06/20/16 - 11:36 AM / Multiple Approvers Funding Change Budget Admins / Multiple Approvers Budget Office Approver / Funding Change VP Approver / Multiple Approvers Payroll Approvers ▶ **Comments** Return to Select Employees
VIEW FUNDING CHANGE STATUS	
Navigation to the Funding Change View	BGSU Menu ▾ > Human Resources ▾ > Funding Change AWE ▾ > Funding Change Approval 📄 Funding Change Request 📄 Funding Change Approval 📄 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.	**View Funding Change Status** The list below contains funding change requests. Select an employee to view details. **Funding Change Requests** See table below.
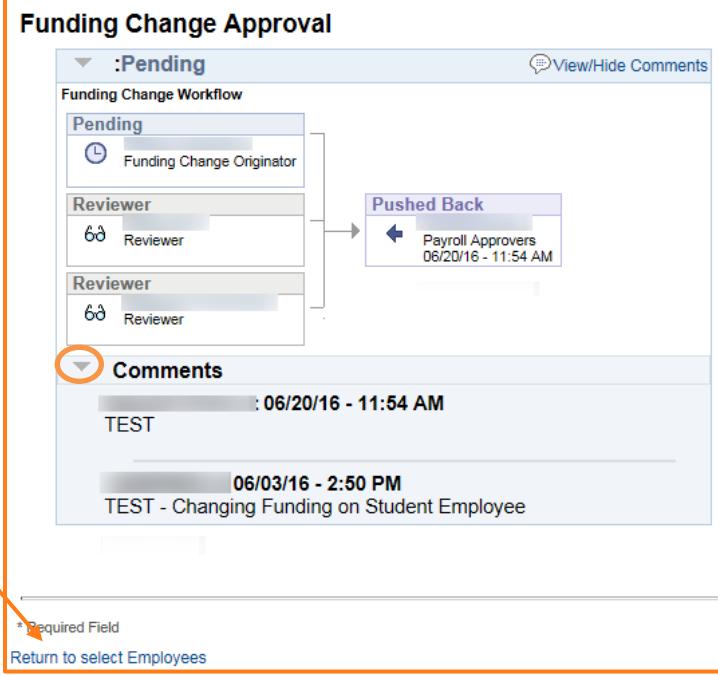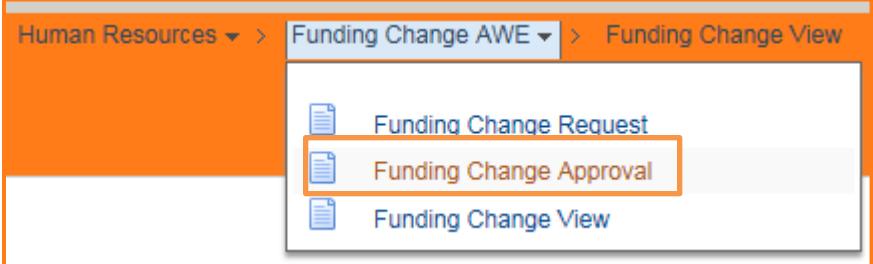
Name	Request Date	Workflow Status	Transaction Number
Abigail Robin	06/05/2016	Rework	1
Phillip Kite	06/01/2016	In Approval Process	2
Abigail Robin	06/12/2016	Data Saved	8
Bradley Swan	06/12/2016	Denied	9
Phillip Kite	06/01/2016	In Approval Process	10
Abigail Robin	06/19/2016	In Approval Process	13
Sandra Goldfinch	07/01/2016	In Approval Process	14
Riley Redshank	07/01/2016	In Approval Process	15

• 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.	

FUNDING CHANGE PUSHBACK

- Make funding changes in the New Values box.

Funding Change Request

Abigail Robin
▸ Instructions

Workflow Status	Rework
Transaction Number	1

New Values

There are future dated rows on the Department Budget table for this employee.

*Effective Date	06/05/2016	About the Effective Date	Fiscal Year 2016
End Date		About the End Date	Fiscal Year

○ Department   ● Appointment

Department   115200   Family & Consumer Sciences
Job Code   S32004   Instructor Aide

Distribution

	*Combination Code	Description	Fund	Dept ID	Description	*Distribution %		
1	1152000D	Family & Consumer Sciences	18600	115200	Family & Consumer Sciences	100.000	+	−

Current Values

Effective Date	06/12/2016	Fiscal Year 2016

○ Department   ● Appointment

Current Distribution

	Combination Code	Description	Fund	Dept ID	Description	Distribution %
1	115200FA	Family & Consumer Sciences	15000	115200	Family & Consumer Sciences	25.000
2	1152000D	Family & Consumer Sciences	18600	115200	Family & Consumer Sciences	75.000

- Add a **Comment** explaining the change
- Click on **Resubmit**

Comment

Approver Name

Comment   TEST - making funding changes and resubmitting for approval.

[Resubmit]   [Deny]

A Confirmation message appears after you select Resubmit.

Submit Confirmation

✓ You have successfully processed the Funding Change request (Transaction# 1) for Abigail Robin as of 6/3/2016.

Funding Change Approval

▾ :Pending   💬 View/Hide Comments

Funding Change Workflow

Self Approved
✓ Funding Change Originator
06/20/16 - 2:27 PM

Reviewer
👓 Reviewer

Reviewer
👓 Reviewer

Pending
🕐 Multiple Approvers
Payroll Approvers

▸ **Comment History**

Return to select Employees