

Funding Changes

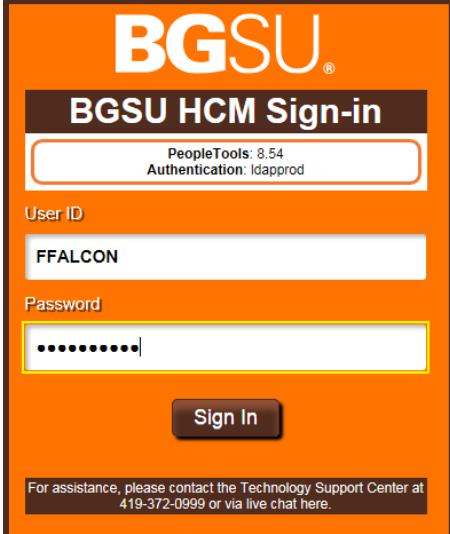
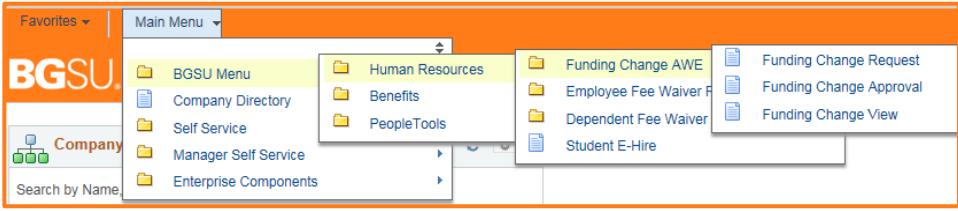
PART OF MANAGER DASHBOARD

Funding Changes

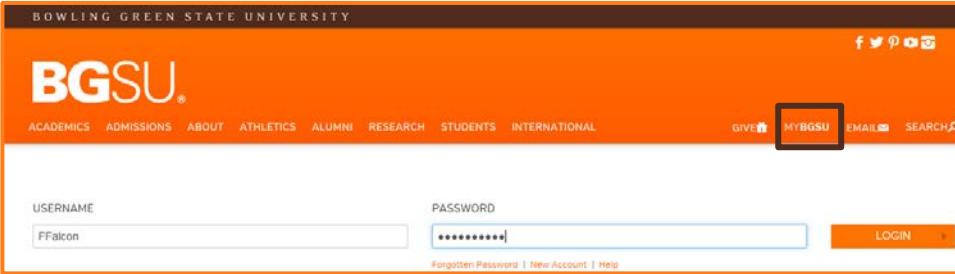
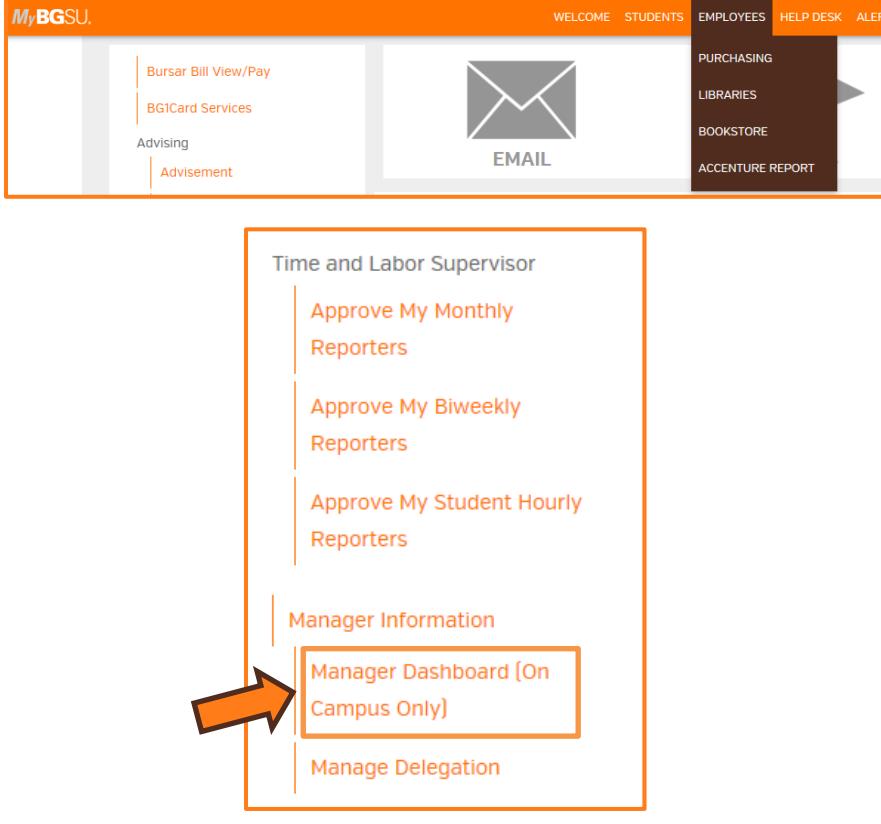
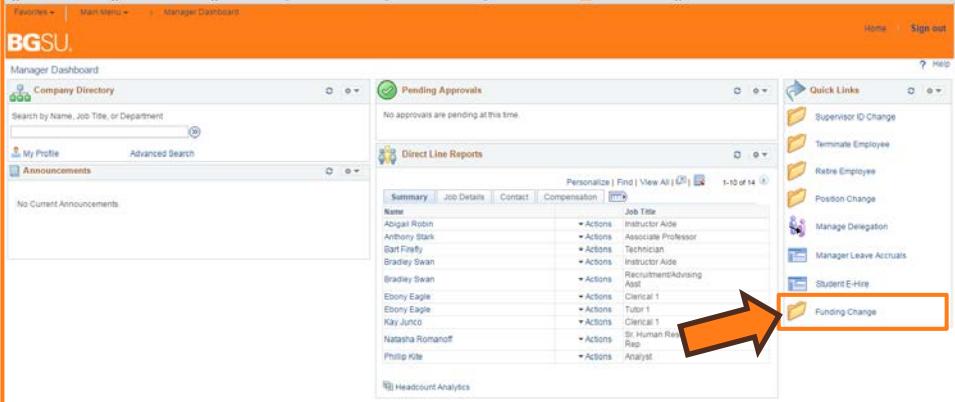
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Funding Changes

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.	<p><i>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.</i></p> <p><i>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.</i></p>
Where do I go?	<p>hcm.bgsu.edu (for Budget Admins) OR MyBGSU > Employees > Manager Information > Manager Dashboard (for Supervisors/Managers)</p>
NAVIGATION Option 1: Budget Admins <ul style="list-style-type: none"> • 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. 	 

Funding Changes

<p>Option 2: Supervisors/Managers</p> <ul style="list-style-type: none"> • Type bgsu.edu in the address bar of your browser. • Click on MyBGSU • Enter User ID and Password and click on LOGIN 	
<ul style="list-style-type: none"> • Click on Employees • Scroll down to the Manager Information section and click on Manager Dashboard 	
<ul style="list-style-type: none"> • You can get to the Funding Change options from the Quick Links in Manager Dashboard <p>➤ <i>Student employee changes begin on page 5</i></p> <p>➤ <i>Faculty/Staff changes begin on page 9</i></p>	

Funding Changes

	 A screenshot of the BGSU Funding Change Request screen. The top navigation bar has 'Favorites' and 'Main Menu' dropdowns. The BGSU logo is on the left. Under 'Funding Change', there are three options: 'Funding Change Request' (highlighted with a red box), 'Funding Change View', and 'Funding Change Approval'. Below these are 'Manager Dashboard' and 'Self-Service dashboard for managers.'
<p>Use the Bread crumb menu in the orange section at the top of the page when moving around.</p> <p>Do not use the browser Back button.</p>	 A screenshot of the BGSU website showing the bread crumb menu. The path is: Favorites > Main Menu > BGSU Menu > Human Resources > Funding Change AWE > Funding Change View. The 'Funding Change View' link is highlighted with a red oval.

Funding Changes

FUNDING CHANGE REQUEST - STUDENTS																																																																																																																																																																																					
<p>EMPLOYEE SELECTION</p> <p>Click on the orange Select button beside the name of the student that has a funding change.</p> <p>OR</p>	<p>Funding Change</p> <p>Employee Selection Criteria</p> <p>Select the employee to be changed. You will be able to process only those employees that you have access to.</p> <p>As Of Date 06/03/2016 <input type="button" value="Refresh Employees"/></p> <p>Find Employee</p> <p>Sharon Wiemken's employees</p> <table border="1"> <thead> <tr> <th>Select</th> <th>Name</th> <th>Empl ID</th> <th>Job</th> <th>Empl Status</th> <th>Full/Part Time</th> <th>HR Status</th> <th>Position</th> <th>Job Code</th> <th>Job Title</th> <th>Dept ID</th> <th>Department</th> </tr> </thead> <tbody> <tr><td>Select</td><td>Abigail Robin</td><td>0020196963 1</td><td>Active</td><td>Part-Time</td><td>Active</td><td>S32004</td><td>Instructor Aide</td><td>115200</td><td>Instructor Aide</td><td>115200</td><td>Family & Consumer Sciences</td></tr> <tr><td>Select</td><td>Anthony Stark</td><td>0010465351 0</td><td>Short Work Break</td><td>Full-Time</td><td>Active</td><td>00001489</td><td>900010</td><td>Associate Professor</td><td>114100</td><td>114100</td><td>Accounting/MIS</td></tr> <tr><td>Select</td><td>Bart 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<ul style="list-style-type: none"> 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. <p><i>Feature only available to Managers. The Budget Admins will need to use the browser search to find an employee in the list.</i></p>	<p>Funding Change</p> <p>Employee Selection Criteria</p> <p>Select the employee to be changed. You will be able to process only those employees that you have access to.</p> <p>As Of Date 06/05/2016 <input type="button" value="Refresh Employees"/></p> <p>Find Employee</p> <p>Sharon Wiemken's employees</p> <table border="1"> <thead> <tr> <th>Select</th> <th>Name</th> </tr> </thead> <tbody> <tr><td>Select</td><td>Abigail Robin</td></tr> <tr><td>Select</td><td>Anthony Stark</td></tr> <tr><td>Select</td><td>Bart Firefly</td></tr> <tr><td>Select</td><td>Bradley Swan</td></tr> <tr><td>Select</td><td>Bradley Swan</td></tr> <tr><td>Select</td><td>Ebony Eagle</td></tr> <tr><td>Select</td><td>Ebony Eagle</td></tr> <tr><td>Select</td><td>Kay Juncio</td></tr> <tr><td>Select</td><td>Natasha Romanoff</td></tr> <tr><td>Select</td><td>Philip Kite</td></tr> <tr><td>Select</td><td>Riley Redshank</td></tr> <tr><td>Select</td><td>Sandra Goldfinch</td></tr> <tr><td>Select</td><td>Steve Rogers</td></tr> <tr><td>Select</td><td>Tammy Caracara</td></tr> </tbody> </table> <div style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;"> <p>Find Employee</p> <table> <tr> <td>Name</td> <td><input type="text" value="begins"/></td> <td><input type="text"/></td> </tr> <tr> <td>Last Name</td> <td><input type="text" value="begins"/></td> <td><input type="text"/></td> </tr> <tr> <td>Second Last Name</td> <td><input type="text" value="begins"/></td> <td><input type="text"/></td> </tr> <tr> <td>Alternate Character Name</td> <td><input type="text" value="begins"/></td> <td><input type="text"/></td> </tr> <tr> <td>Middle Name</td> <td><input type="text" value="begins"/></td> <td><input type="text"/></td> </tr> <tr> <td>Empl ID</td> <td><input type="text" value="begins"/></td> <td><input type="text"/></td> </tr> <tr> <td>Empl Status</td> <td><input type="text" value="="/></td> <td><input type="text"/></td> </tr> <tr> <td>Full/Part Time</td> <td><input type="text" value="="/></td> <td><input type="text"/></td> </tr> <tr> <td>Position</td> <td><input type="text" value="begins"/></td> <td><input type="text"/></td> </tr> <tr> <td>Job Code</td> <td><input type="text" value="begins"/></td> <td><input type="text"/></td> </tr> <tr> <td>Job Title</td> <td><input type="text" value="begins"/></td> <td><input type="text"/></td> </tr> <tr> <td>Dept ID</td> <td><input type="text" value="begins"/></td> <td><input type="text"/></td> </tr> <tr> <td>Department</td> <td><input type="text" value="begins"/></td> <td><input type="text"/></td> </tr> </table> <p style="text-align: right;"><input type="button" value="Search"/> <input type="button" value="Reset Search"/></p> </div>	Select	Name	Select	Abigail Robin	Select	Anthony Stark	Select	Bart Firefly	Select	Bradley Swan	Select	Bradley Swan	Select	Ebony Eagle	Select	Ebony Eagle	Select	Kay Juncio	Select	Natasha Romanoff	Select	Philip Kite	Select	Riley Redshank	Select	Sandra Goldfinch	Select	Steve Rogers	Select	Tammy Caracara	Name	<input type="text" value="begins"/>	<input type="text"/>	Last Name	<input type="text" value="begins"/>	<input type="text"/>	Second Last Name	<input type="text" value="begins"/>	<input type="text"/>	Alternate Character Name	<input type="text" value="begins"/>	<input type="text"/>	Middle Name	<input type="text" value="begins"/>	<input type="text"/>	Empl ID	<input type="text" value="begins"/>	<input type="text"/>	Empl Status	<input type="text" value="="/>	<input type="text"/>	Full/Part Time	<input type="text" value="="/>	<input type="text"/>	Position	<input type="text" value="begins"/>	<input type="text"/>	Job Code	<input type="text" value="begins"/>	<input type="text"/>	Job Title	<input type="text" value="begins"/>	<input type="text"/>	Dept ID	<input type="text" value="begins"/>	<input type="text"/>	Department	<input type="text" value="begins"/>	<input type="text"/>																																																																																																															
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Funding Changes

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 419-372-2885.

New Values

<input type="text" value="*Effective Date"/> [i]	About the Effective Date	Fiscal Year
<input checked="" type="radio"/> Department	Department 115200 Job Code S32004	<input checked="" type="radio"/> Appointment Family & Consumer Sciences Instructor Aide
Comments	[i]	

Current Values

Effective Date 08/12/2016	Fiscal Year 2016				
<input checked="" type="radio"/> Department	<input checked="" type="radio"/> 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 Effect Date**) will provide additional information that may assist you with the process

Funding Changes

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 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:

- Home department from a fund other than operating
- Home department, any fund and a program code
- Different from home department, with or without program codes
- Shared support between departments, grant and department, or Federal Work Study
- 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

Department Appointment

End Date About the End Date Fiscal Year

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 <input type="button"/> <input type="button"/>

Funding Changes

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		
<input type="radio"/> Department		<input type="radio"/> 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 <input type="button" value="+"/> <input type="button" value="-"/>
2 115200FA	Family & Consumer Sciences	15000	115200	Family & Consumer Sciences	25.000 <input type="button" value="+"/> <input type="button" value="-"/>
Comments TEST - Changing Funding on Student Employee					<input type="button" value="Run 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.

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

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

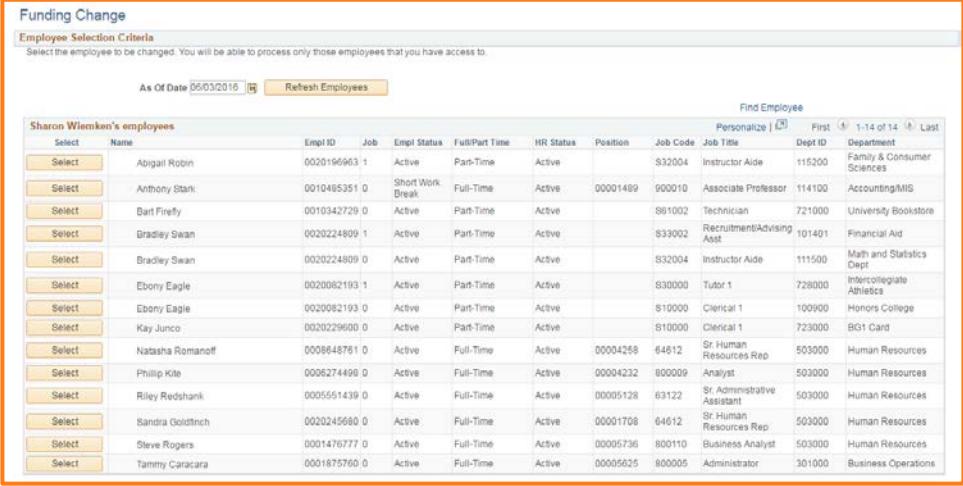
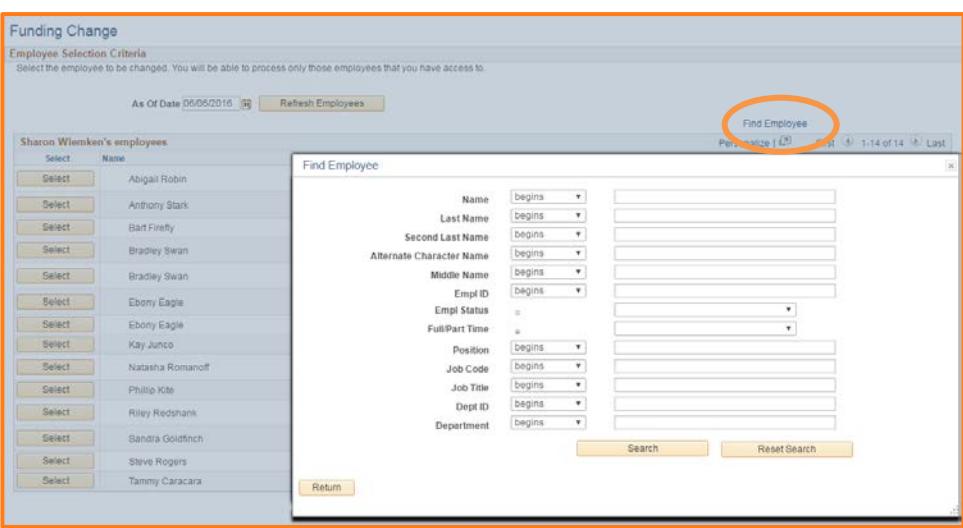
Self Approved	Funding Change Originator 06/20/16 - 10:48 AM
Reviewer	63 Reviewer
Reviewer	63 Reviewer

Pending Multiple Approvers Payroll Approvers

Comments

[Return to Select Employees](#)

Funding Changes

FUNDING CHANGE REQUEST – FACULTY/STAFF	EMPLOYEE SELECTION
<p>Click on the orange Select button beside the name of the employee that has a funding change.</p> <p>OR</p>	
<ul style="list-style-type: none"> 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. <p><i>Feature only available to Managers. The Budget Admins will need to use the browser search to find an employee in the list. (Ctrl+F)</i></p>	

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.

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
Position Number 00004232
Job Code 800009
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 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 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
Position Number 00004232
Job Code 800009
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](#)

Funding Changes

<p>NEW VALUES</p> <p>Select Department if source of support is 100% the home department operating fund with no program codes. Ex: Department #, fund 10000 or 100000OP -</p> <p>Select Position only if funded by a source other than Home Department.</p> <p>Contact the Payroll Office with any questions at payroll@bgsu.edu or 419-372-2201.</p>	<p>About the End Date</p> <p>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.</p> <p>Funding Change Request</p> <p>Phillip Kite Instructions</p> <p>New Values</p> <p>Based on the entered date(s), this request will be a retroactive funding change request and it will require manual processing by Payroll.</p> <p>*Effective Date 06/01/2016 <input type="button" value="X"/> About the Effective Date Fiscal Year 2016</p> <p>End Date <input type="button" value="X"/> About the End Date Fiscal Year</p> <p><input checked="" type="radio"/> Department <input checked="" type="radio"/> Position</p> <p>Department 503000 Position Number 00004232 Job Code 800009 Compensation Rate</p> <p>Distribution</p> <table border="1"> <thead> <tr> <th>*Combination Code</th> <th>Description</th> <th>Fund</th> <th>Dept ID</th> <th>Description</th> <th>*Distribution %</th> </tr> </thead> <tbody> <tr> <td>1 503000OP</td> <td>Human Resources</td> <td>10000</td> <td>503000</td> <td>Human Resources</td> <td>80.000 <input style="border: 1px solid orange; border-radius: 50%; width: 20px; height: 20px;" type="button" value="+"/></td> </tr> <tr> <td>2 316000OP</td> <td>Information Technology Service</td> <td>10000</td> <td>316000</td> <td>Information Technology Service</td> <td>20.000 <input style="border: 1px solid orange; border-radius: 50%; width: 20px; height: 20px;" type="button" value="+"/></td> </tr> </tbody> </table>	*Combination Code	Description	Fund	Dept ID	Description	*Distribution %	1 503000OP	Human Resources	10000	503000	Human Resources	80.000 <input style="border: 1px solid orange; border-radius: 50%; width: 20px; height: 20px;" type="button" value="+"/>	2 316000OP	Information Technology Service	10000	316000	Information Technology Service	20.000 <input style="border: 1px solid orange; border-radius: 50%; width: 20px; height: 20px;" type="button" value="+"/>
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<p>Below the Current Data box, Check the box to confirm that you have discussed this funding change with all appropriate individuals.</p> <p>Click the Submit button.</p>	<p><input checked="" type="checkbox"/> By completing and submitting this Funding Change Request Form, I am confirming that I have discussed this funding change with all appropriate individuals.</p> <p><input type="button" value="Submit"/></p>																		

Funding Changes

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

Funding Change Workflow

Self Approved	Pending	Not Routed	Not Routed	Not Routed
Funding Change Originator 06/20/2016 - 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.

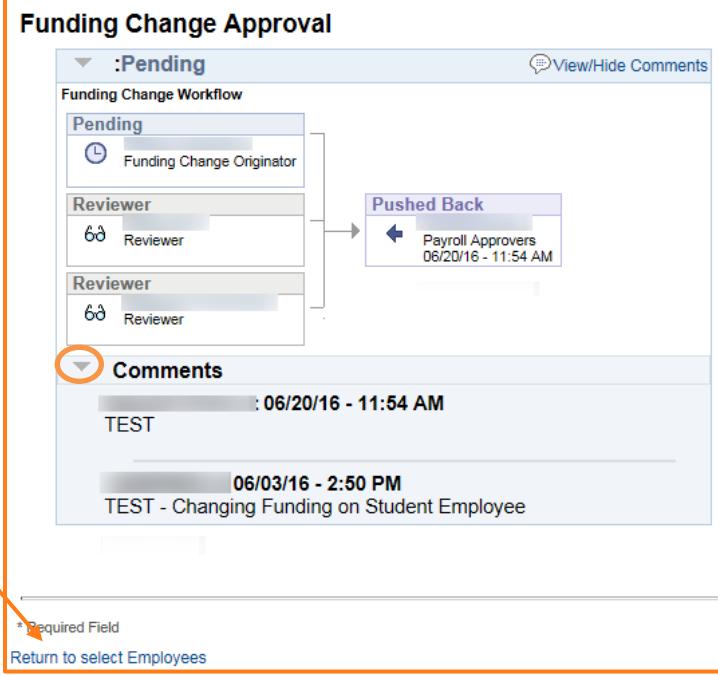
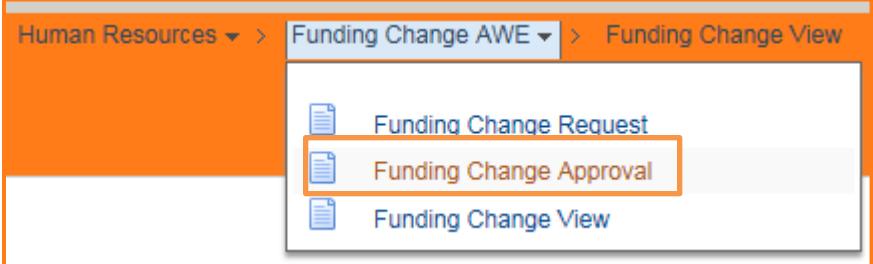
Those Funding Changes that are Denied, cannot be changed and resubmitted.

View Funding Change Status

The list below contains funding change requests. Select an employee to view details.

Funding Change Requests			
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

Funding Changes

<ul style="list-style-type: none">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.	

Funding Changes

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: 1 115200OD	Description: Family & Consumer Sciences	Fund: 18800 Dept ID: 115200 Description: Family & Consumer Sciences Distribution %: 100.000

Current Values

Effective Date: 06/12/2016 Fiscal Year: 2016

○ Department ○ Appointment

Combination Code: 1 115200FA	Description: Family & Consumer Sciences	Fund: 16000 Dept ID: 115200 Description: Family & Consumer Sciences Distribution %: 25.000
2 115200OD	Family & Consumer Sciences	18800 115200 Family & Consumer Sciences 75.000

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

Comment

Approver Name: [Redacted]

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: 60 Reviewer → **Pending** Multiple Approvers Payroll Approvers

Reviewer: 60 Reviewer

Comment History

Return to select Employees