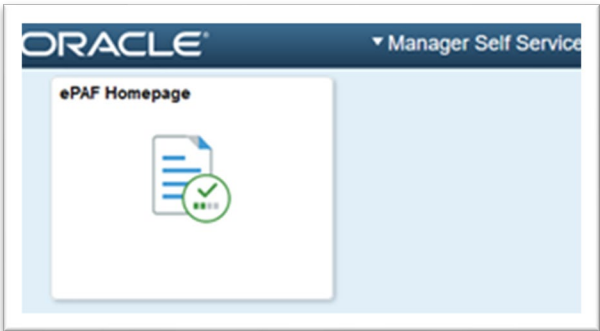
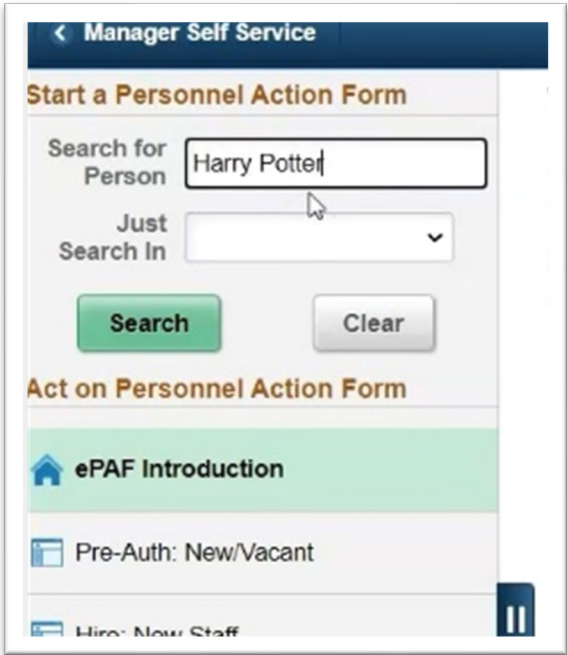
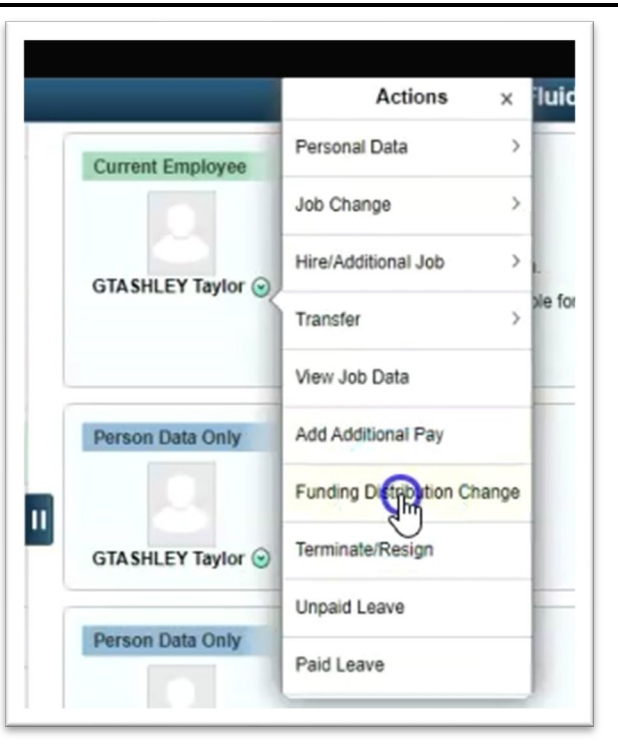
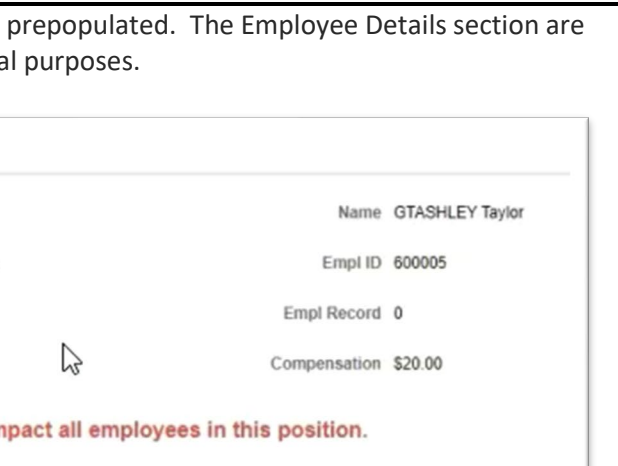
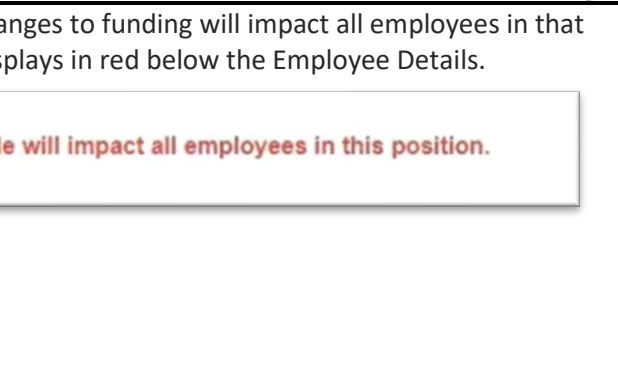




Step	How to change the Funding Distribution or Funding Sources for a position
Navigation: Main Menu > Navigate to Manager Self Service > ePAF Homepage tile	
1	Open ePAF Tile from Manager Self Service 
2	<p>Search for an employee in the upper left box in one of these ways.</p> <ol style="list-style-type: none"> 1. Search by Name <ol style="list-style-type: none"> a. Enter their first name followed by their last name. Partial names can be used. b. For example: Searching for "Ma Fle" will return Marcella Fleming, Mary Fleming, Max Fletcher, and Matthew Fleming, etc. c. Add more letters to the name to narrow the search. d. Use the beginning of the names when using partial names. 2. Search by Employee ID <ol style="list-style-type: none"> a. Partial or whole EMPL IDs can be used. b. Use the beginning for the EMPL ID when using partial numbers. 



3	<p>Click on Funding Distribution Change action from the related action drop-down.</p>	
4	<p>The form will now open with the employee's data prepopulated. The Employee Details section are read only fields and are displayed for informational purposes.</p>	
5	<p>If the selected position is a pooled position, all changes to funding will impact all employees in that position. If this is the case, a warning message displays in red below the Employee Details.</p>	



6

The current funding distribution is displayed in the first grid.
In the grid, you will find the distribution % and the distribution dollar amount based on the Compensation shown in the Employee Details segment.
The HR Combo code also shows along with the chartfield details.

Current Distribution

This segment displays current funding.

	Dist %	Dist Amount \$	HR Combo Code	Account	Fund	Org	Function	Entity	Source	Purpose	Project	Select
1	33.000000	11747.993000	000074055	511011	EDGEN	HRH01001	00116	00000				No
2	33.000000	11747.993000	000071928	511011	MISCA	HRH01001	00116	00000				No
3	34.000000	12103.993000	000074318	511011	SUALX	HRH02001	00061	00000	SU384900			No

To include all the rows from Current Distribution in the New Distribution, select the button below labeled "Copy All Funding Rows to New Distribution." To select individual funding rows, use the select box next to the desired funding row.

To remove all the funding rows from New Distribution, select the button below labeled "Remove All Funding Rows from New Distribution."

7

There are three ways to add new rows in the New Funding Distribution grid.

1. To reuse a single row from the Current Distribution, use the **SELECT** button in the far-right field on the grid. The Select button will not always be available. The current account code may no longer be valid and in those cases, the select button will not be available.

2. The second way to add new rows is by copying all the current funding rows into the new distribution. This is great for cases where the funding accounts will be staying the same but just the percentages or amounts need to be updated. Click on the **"COPY ALL FUNDING ROWS TO NEW DISTRIBUTION"** button and it will copy all the funding rows into the New Distribution grid. If you have copied all rows but change your mind, you can click the **"REMOVE ALL FUNDING ROWS FROM NEW DISTRIBUTION"** button to remove all the copied rows.

3. The final way to update New Distribution is by using the **"SELECT/CREATE COMBO CODE"** button. When clicked, the Select HR Combo Code screen will open.



8

On the “[SELECT HR COMBO CODE](#)” screen, if you know the HR Combo Code you want to use, enter it into the Combo Code field.

If you do not know the HR Combo Code but know parts of the chartfield string, use the fields to search for the pieces you know.

If you don't know the values for the fields, use the prompt button to see the lists of valid values.

Once you have entered as many pieces of the chartfield string as you know, click on “[SEARCH](#)” to return all HR combo codes that match the combination of chartfield values that you entered.

Note: if more than 100 rows are found, an error message will appear and you will be asked to refine the search to return fewer results by adding more segments of the chartfield string.

9

If no HR Combo Codes return, you also have the option to create a new combo code. At a minimum you must select an [ACCOUNT](#), [FUND](#), [ORG](#), [FUNCTION](#) and [ENTITY](#). If you do not have an [ENTITY](#), enter 00000. Note: Other fields may be required depending on your selection of these main five requirements.

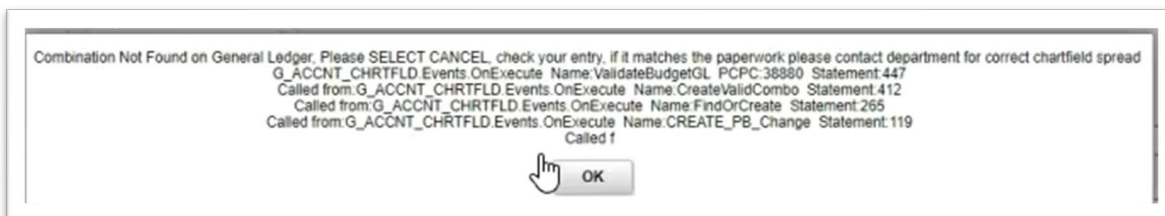
The form will pop up messages to guide the user through creation of the new combo code. For example:

- If the Fund Code = SPNSR or SP490, a project ID is required.
- If the Fund Code = SVCCT, the source must start with SC.
- If the Fund Code = MISCA, function 00030 is not allowed.



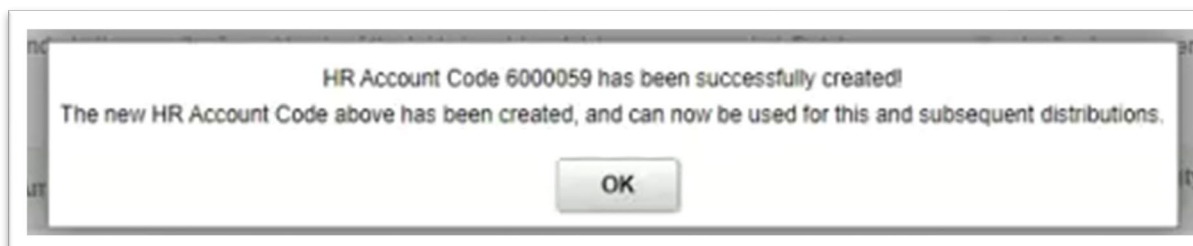
After clicking **“CREATE”**, a message appears asking you to confirm a New HR Account code should be created.
To confirm, click **“YES”**.
If no, you can continue to search for an existing HR Combo Code.

The HR Combo Code creation will fail if the chartfield string information is not valid in the Financials system and this error will be shown. If you believe the chartfield string should be valid, please contact your department administrator of Financial Services.

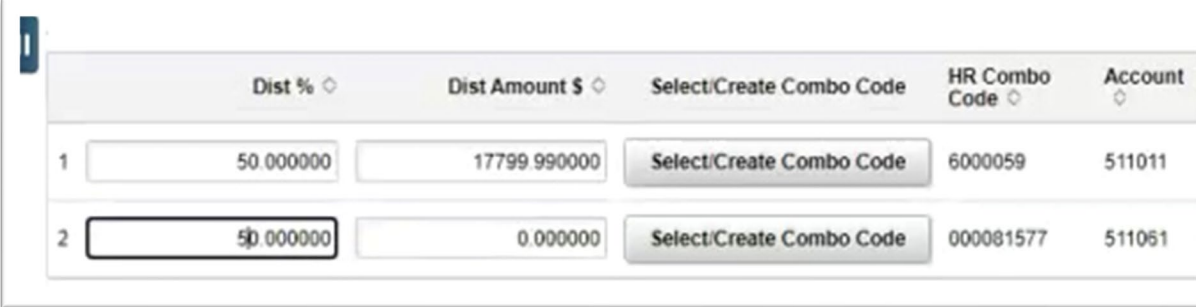

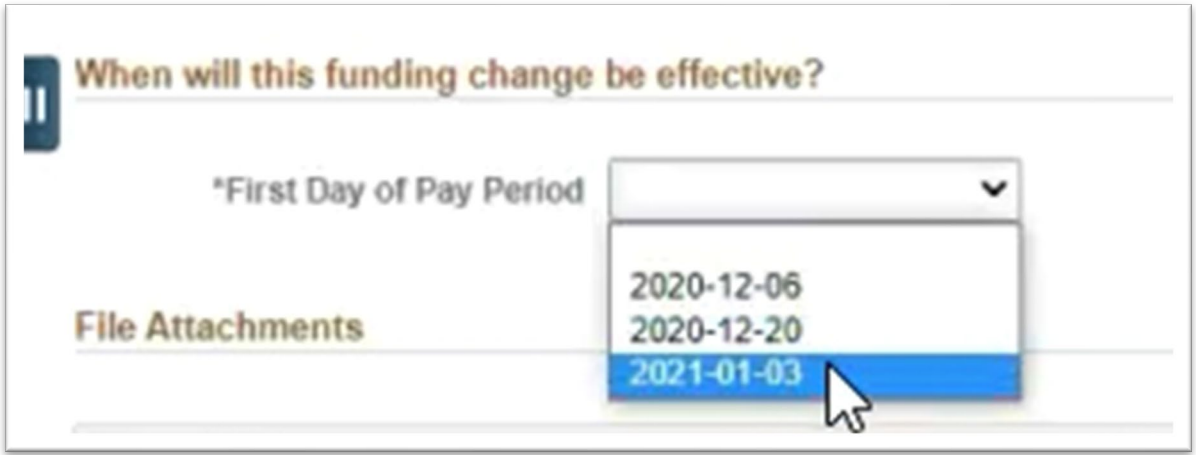


10


When the HR Combo Code creation is successful, this confirmation message will appear showing the newly created HR Combo Code. The Select HR Combo Code window will close and the chartfield string will be displayed in the grid.





<p>11</p>	<p>Users can either enter a distribution percent or a distribution amount in the new distribution grid. The fields will automatically calculate based upon which field is entered first. The calculation is based upon the Compensation rate in the Employee Details header.</p> 
<p>12</p>	<p>The distribution percentages entered in the New Distribution grid will total and the sum will be in the Percent Total field.</p> <p>The total percent must equal 100% to continue.</p> 
<p>13</p>	<p>Indicate when the funding change should take effect. University policy requires that most funding changes be effective the first day of a pay period.</p> <p>If none of the funding rows in the New Distribution grid include a Project ID, then the First Day of Pay Period drop-down will appear. The options in the drop-down will include the current pay period plus the next two pay period start dates. Choose one of these options to proceed.</p> 



	<p>If any of the funding rows in the New Distribution <u>has</u> a Project ID, then the Effective Date field will show. Enter a date that is within the current or next two pay periods.</p> <div data-bbox="397 352 1221 575"><p>When will this funding change be effective?</p><p>*Effective Date <input type="text"/> </p></div>										
14	<p>Any relevant attachments can be uploaded.</p> <div data-bbox="272 648 1453 842"><p>File Attachments</p><table border="1"><thead><tr><th>Status</th><th>Action</th><th>Description</th><th>File Name</th><th>Delete</th></tr></thead><tbody><tr><td>1</td><td><input type="button" value="Upload"/></td><td><input type="text"/></td><td></td><td><input type="button" value="Delete"/></td></tr></tbody></table><p><input type="button" value="Add"/></p></div>	Status	Action	Description	File Name	Delete	1	<input type="button" value="Upload"/>	<input type="text"/>		<input type="button" value="Delete"/>
Status	Action	Description	File Name	Delete							
1	<input type="button" value="Upload"/>	<input type="text"/>		<input type="button" value="Delete"/>							
15	<p>Click “SUBMIT” to initiate the workflow process.</p> <div data-bbox="472 926 1062 1146"><p>Comments</p><p><input type="button" value="Search"/> <input type="button" value="Save"/> <input type="button" value="Submit"/></p></div>										

Process Notes:

- Retroactive Funding Changes are not allowed.
- A Funding Change must be **submitted by the end** of the pay period it is effective in.