University of Connecticut

Funding Change Job Aid

Overview   Department Processors are responsible for initiating a funding change. Once the Smart HR *Funding Change* template is complete, the template is submitted to the Department Approver for approval, and is then finalized centrally by the Payroll Department.
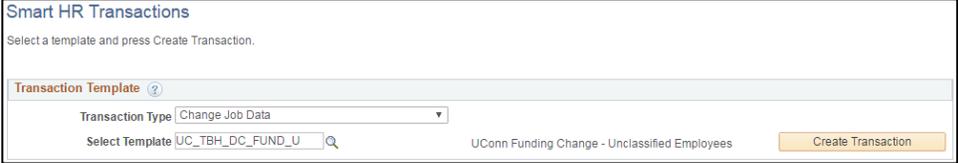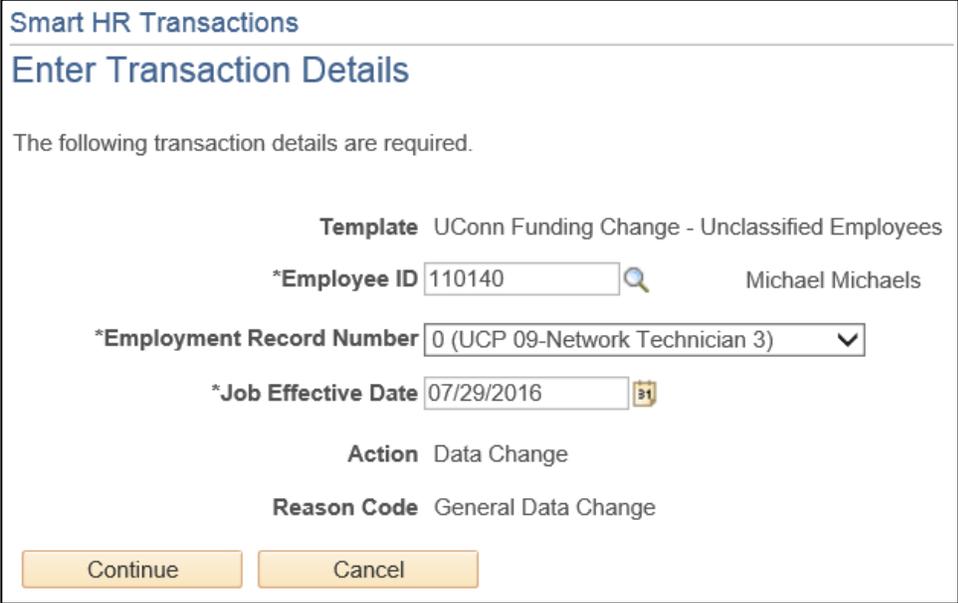
There are **five** Smart HR *Funding Change* templates in Core-CT, one for each employee group. Each template is identical. The five are as follows:

- UC_TBH_DC_FUND_STU: Funding Change – Student
- UC_TBH_DC_FUND_GAI: Funding Change – Graduate Assistant and Graduate Intern
- UC_TBH_DC_FUND_CLS: Funding Change – Classified
- UC_TBH_DC_FUND_U: Funding Change – Unclassified
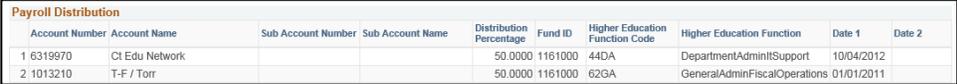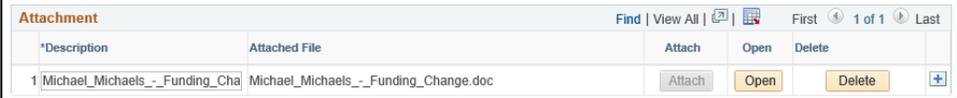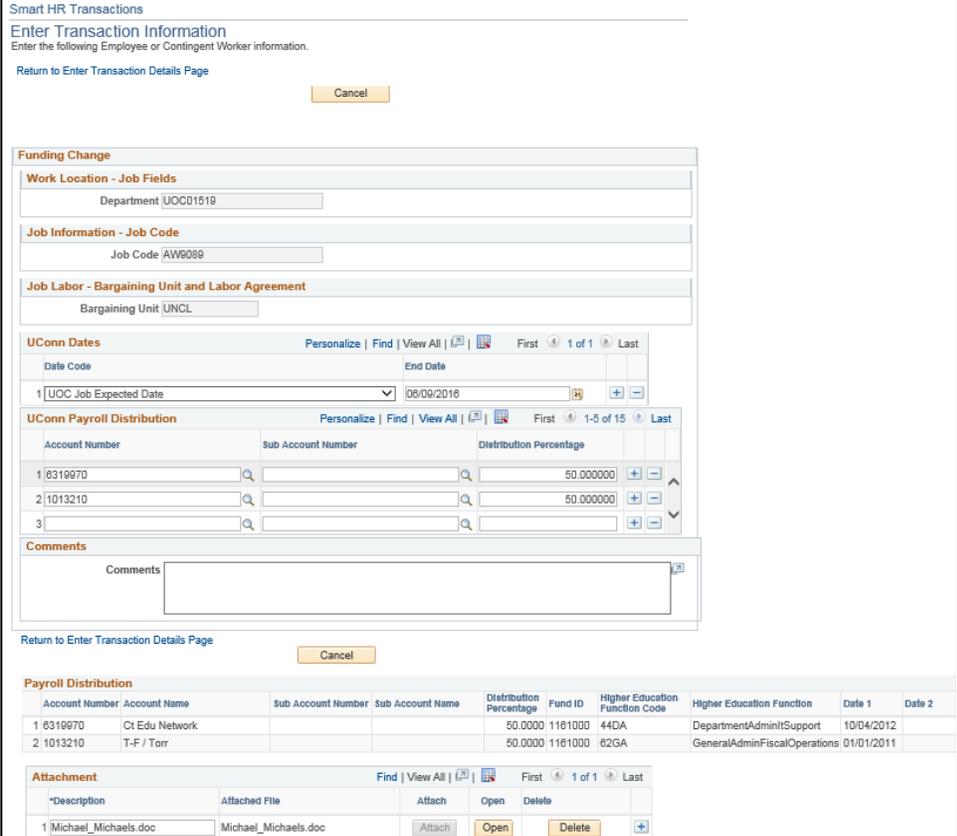- UC_TBH_DC_FUND_SPE: Funding Change – Special Payroll

As University best practice, an employee can have up to 10 funding codes tied to an employee, with their distribution percentage between all codes equal to 100%. Percentages in Core-CT can go up to 6 numbers past the decimal (ex: 12.275125%).

Use this job aid to process a funding change for an employee in Core-CT. This example uses the *Unclassified Funding Change* template.

UConn/Core CT Job Aid: Funding Change

Version 1.0

Process Steps

Step	Action	Screenshot
1	Navigation: **Main Menu > Core-CT HRMS > Workforce Administration > Smart HR Template > Smart HR Transactions**	
2	From the **Smart HR Transactions** page, enter the following: • **Transaction Type:** Change Job Data • **Select Template:** UC_TBH_DC_FUND_U Click **Create Transaction.**	Smart HR Transactions Select a template and press Create Transaction. **Transaction Template** ? Transaction Type: Change Job Data Select Template: UC_TBH_DC_FUND_U 🔍 UConn Funding Change - Unclassified Employees Create Transaction
3	On the **Enter Transaction Details,** enter the following: • **Employee ID**: Enter the employee ID for the employee whose funding is being updated. If unknown, click the **magnifying glass** to search for the employee. • **Employment Record Number:** This will auto-populate with the most recent employment number. If the employee has more than one Active employment record, select the one the employee funding is being updated for. • **Job Effective Date**: Enter the date the funding change is effective. Then, click **Continue**.	Smart HR Transactions **Enter Transaction Details** The following transaction details are required. Template UConn Funding Change - Unclassified Employees *Employee ID 110140 🔍 Michael Michaels *Employment Record Number 0 (UCP 09-Network Technician 3) ▼ *Job Effective Date 07/29/2016 📅 Action Data Change Reason Code General Data Change Continue Cancel

Step	Action	Screenshot
4	On the **Enter Transaction Information** page, the **Department** and **Job Code** will be pre-populated and read-only. The **UConn Dates** section will populate with any current dates associated with the employee. In this example, the employee's **UOC Union Entry Date** information is populated. Update, if necessary. The employee's current funding information populates on the template.	
5	On the **UConn Payroll Distribution** section, update the funding information as required. In this example, a second funding account was added to the employee's funding information, and the **Distribution Percentage** for each account was updated to 50.000000%. **Note:** As a reminder, the **Distribution Percentage** <u>must</u> equal 100.000000%. Click **Return** to return to the template.	

Step	Action	Screenshot
6	Back on the template, click **Save and Calculate.** At the bottom of the template, the updated funding information is available in the **UConn Payroll Distribution** section.	
7	When the employee clicks **Save and Calculate,** the **Attachments** section will open at the bottom of the template. If applicable, search for and attach an attachment to include with the funding change.	
8	When all the information on the template is complete, click **Submit.** This will route the Funding change template to the Department Approver for approval.	