

### **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. <u>Each</u> 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 H	RMS > Workforce Administration > Smart HR Template > Smart HR Transactions
2	<ul> <li>From the Smart HR Transactions page, enter the following:</li> <li>Transaction Type: Change Job Data</li> <li>Select Template: UC_TBH_DC_FUND_U</li> <li>Click Create Transaction.</li> </ul>	Smart HR Transactions         Select a template and press Create Transaction.         Transaction Template @         Transaction Type Change Job Data         V         Select Template UC_TBH_DC_FUND_U         UConn Funding Change - Unclassified Employees
3	<ul> <li>On the Enter Transaction Details, enter the following:</li> <li>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.</li> <li>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.</li> <li>Job Effective Date: Enter the date the funding change is effective.</li> <li>Then, click Continue.</li> </ul>	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

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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.	Smart HR Transaction Information         Enter Transaction Information         Enter Transaction Information         Enter Transaction Details Page         Save for Later         Cancel             Funding Change             Work Location - Job Fields         Department UOC01519         Job Information - Job Code         Job Labor - Bargaining Unit and Labor Agreement         Bargaining Unit UNCL         UConn Dates       Personalize   Find   View All [23]         Pate Code       First 4 1 of 1 4 Last         1 UCC Job Expected Date       000092016         UConn Payroll Distribution       Personalize   Find   View All [23]         Account Number       Sub Account Number         Distribution Percentage       16319970         2       Q       Q         3       Q       Q         Bare and Calculate       Save for Later
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 100.00000%. Click Return to return to the template.	UConn Payroll Distribution       Personalize   Find   View All   20   日       First ④ 1-5 of 15 € Last         Account Number       Sub Account Number       Distribution Percentage         1 6319970       Q       50.000000 € □         2 1013210       Q       50.000000 € □         3       Q       Q

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Step	Action	Screenshot
6	Back on the template, click <b>Save</b> and Calculate. At the bottom of the template, the updated funding information is available in the <b>UConn Payroll Distribution</b> section.	Payroll Distribution         Higher Education Function         Date 1         Date 2           1 6319970         Ct Edu Network         Sub Account Number         Sub Account Name         Sub Account Name         Sub Account Name         Function Code         Higher Education Function         Date 1         Date 2           2 1013210         T-F / Torr         S0.0000         1161000         62GA         GeneralAdminFiscalOperations         0101/2011
7	When the employee clicks <b>Save</b> 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.	Attachment       Find       View All       Image: Comparison of the sector of the se
8	When all the information on the template is complete, click <b>Submit</b> . This will route the Funding change template to the Department Approver for approval.	Smart HR Transactions         Enter Transaction Information         Enter Transaction Details Page         Cancel         Work Location - Job Fields         Department U0001519         Job Information - Job Code         Job Code X00009         Job Code X0009