



BUDGET OFFICE
Illinois State University

Budget Office

CHANGE POSITION FUNDING FORM

USER INSTRUCTIONS



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CHANGE POSITION FUNDING FORM

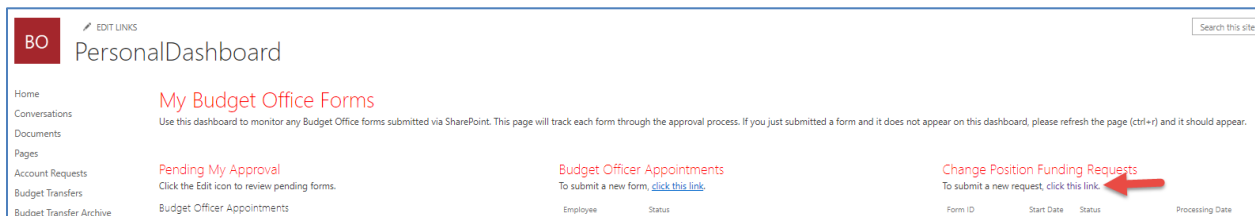
PURPOSE

The Change Position Funding Form is used to request a change to the accounts (and proportion) that fund an existing position for a specific or open-ended time frame. This form is used for the following job types: Administrative Professional (AP), Civil Service, Extra Help, Faculty Associate, Grad Assistant, Non-Tenure Track Faculty (NTT), Student Employees, and Tenure-Track Faculty (TTF). The request is electronically routed to the Budget Officer whose account funds the largest portion of the position for review and approval. Budget Officers for other accounts that provide a portion of the position’s funding receive an email notification of the request. The Budget Office reviews and processes the funding change.

ACCESSING THE FORM

Personal Dashboard: My Budget Office Forms

The Change Position Funding Form can be accessed by going to the Budget Office “forms” web page - <https://budget.illinoisstate.edu/forms/> and selecting the Change Position Funding Form link in the “Forms” box. This will open the Personal Dashboard: My Budget Office Forms. In the Change Position Funding Requests section select [click this link](#).



This dashboard may also be used to track Change Position Funding requests through the review and approval process. [Click here](#) to review these instructions.

FORM COMPLETION/SUBMISSION BY DEPARTMENT

Department staff access the Change Position Funding Form from the Personal Dashboard.

Position Information

(If entering position funding changes for multiple positions with the same Budget Officer, please [click here](#) for instructions.)



Change Position Funding Form			
This form is used to request changes to position funding, including grant buyouts. Please provide the new funding account(s) and distribution information, including start and end dates of the requested funding change. If multiple start and end dates are required, please complete additional forms to capture those dates. For questions regarding the form, please contact Vicki Cooley at vicool@ilstu.edu .			
Position Information			<input type="checkbox"/> I am entering information for multiple positions with the same Budget Officer.
Position Number:	<input type="text" value="22222222"/> <input type="button" value="Import"/>	Employee Type:	<input type="text" value="Civil Service"/>
Person in Position:	<input type="text" value="Ward, Joseph;"/> <input type="button" value="Lookup"/>	UID:	<input type="text" value="888888888"/>
Rate of Pay:	<input type="text" value="\$4,000.00"/> <input checked="" type="radio"/> Monthly <input type="radio"/> Hourly	Department:	<input type="text" value="Comptroller's Office"/>
Appt. End Date:	<input type="text"/> <input type="button" value="Calendar"/> (if applicable)		

Position Number: Must be eight digits

Import: Enter the position number and move off the position number field for the “Import” button to appear. Click “Import” button.

- If a Change Position Funding Form has previously been submitted for the position number entered, the data from the immediate prior request for that position number will populate the new form. The Person in Position and Budget Officer fields will remain blank. Update these as needed.
- Update the funding information as needed (Rate of Pay, dates, funding accounts/amounts, etc.)
- Proceed with form submission as usual
- Notes:
 - This only works if there is a prior request submitted for the Position Number in SharePoint
 - If the import button is pressed and no prior form is found, a message pops up to inform that it worked, but no data was found
 - When successful, this pulls the most recent previously submitted funding information for the position number, regardless of its status in processing

Employee Type: Select from Drop-down list. If “other” is selected, please provide additional information

Person in Position (if position is filled, otherwise leave blank): May enter as “Last Name, First Name” or use Lookup as follows:



- Enter the person’s last name and click “enter”
- Select the person’s name in the list that’s returned
- Click “OK” to enter the person’s name in the “Person in Position” field



Select People

Find

	Display Name	E-mail Address	Title
All Search Results (51)	Ward, Dane	dmward@ilstu.edu	
<input type="checkbox"/> All Users (0)	Ward, Robert	rward1@ilstu.edu	Supervis
<input type="checkbox"/> All Users (per Tenant) (0)	Ward, Joseph	jsward7@ilstu.edu	IT Tech A
<input type="checkbox"/> Tenant (51)	Ward, Whitney	wward@ilstu.edu	Sophomc
<input type="checkbox"/> Extranet Users (0)	Ward, Wesley	wward2@ilstu.edu	
<input type="checkbox"/> Federated Directory (0)	Ward, Kevin	kward2@ilstu.edu	Senior
	Ward, Samantha	snward@ilstu.edu	
	Ward, Jennifer	jward2@ilstu.edu	Senior
	Ward, Jackson	jward@ilstu.edu	Senior
	Ward, Maycee	mward2@ilstu.edu	Senior
	Ward, Charles	cward2@ilstu.edu	
	Ward, Brent	bnward1@ilstu.edu	Graduate
	Ward, Jane	vjward@ilstu.edu	
	Ward, Jennifer	jsward@ilstu.edu	
	Ward, Meredith	mnward4@ilstu.edu	Senior
	Ward, Alyssa	award12@ilstu.edu	Senior

UID: enter if position is filled (9 digits, first digit = 8)

Rate of Pay: Enter the monthly or hourly rate of pay

Select the Monthly or Hourly radio button, based on the rate of pay entered

Appt End Date: Enter date via calendar app or by typing

Department: Select Department name from drop-down list

Funding Information

Funding Information					
Please do not submit this form unless the funding amount equals exactly 100%					
Effective Start:	<input type="text" value="4/1/2020"/>	Effective End:	<input type="text" value="6/30/2020"/>	(blank if indefinite)	
			<input type="checkbox"/> Revert position back to prior funding once Effective End date is reached.		
Account(s):	Budget Officer(s):	Amount(s):	%	Adjusted:	
<input type="text" value="10400-06-120000000"/>	<input type="text" value="Langdon, Janis;"/>	<input type="text" value="\$3,500.00"/>	87.500	<input type="text" value="\$3,500.00"/>	
<input type="text" value="10400-06-102000000"/>	<input type="text" value="Hendrix, Amanda;"/>	<input type="text" value="\$500.00"/>	12.500	<input type="text" value="\$500.00"/>	
<input type="text"/>	<input type="text"/>	<input type="text"/>			
<input type="text"/>	<input type="text"/>	<input type="text"/>			
<input type="text"/>	<input type="text"/>	<input type="text"/>			
		<i>total</i>	100.000	<i>\$4,000.00</i>	
		<i>remaining</i>	0.000	<i>\$0.00</i>	

Effective Start date/Effective End date: Enter dates via calendar app or by typing; Effective End date may be left blank if position is continuous.

Select the “Revert position back to prior funding...” checkbox to request that the position’s funding be reverted back to the most recent prior funding at the Effective End date. A Change Position Funding Form submission is not needed for this funding change to occur.

This checkbox appears when an Effective End date is entered.

Funding information section:

- Accounts: enter in “XXXXX_XX_XXXXXXXXX” format; list up to five accounts
- Budget Officer: use lookup icon to enter Budget Officer for each account listed or type as “last name, first name” (name will be validated to employee list)
- Amount(s): enter the monthly or hourly rate of pay that will be funded by each account.

Notes:

- For a position with more than five funding accounts, please contact the Budget Office for assistance in completing the request.
- The “%” and Adjusted amount is calculated based on the “Rate of Pay” entered in the “Position Information” section of the form. Funding information for 100% of the rate of pay must be entered prior to submitting the form for approvals/processing.

Grant funding – if a position is funded partially or in entirety by a grant account (115XX_XX_XXXXXXXXX), additional fields will be opened for completion

- Will this position have an Additional Pay? Select “Yes” or “No”. If yes, then...


- Amount of Additional Pay? Enter amount. (Note: The Additional Pay form must be submitted via iPeople for proper approvals.)

Additional Comments may be provided. These comments will be saved with the form submission and will be viewable by all who have access to the form.

<p>Will this position have an Additional Pay? Yes <input type="checkbox"/></p> <p>Amount of Additional Pay: <input type="text"/></p> <p>This does NOT replace the existing process for requesting an Additional Pay. This is strictly for informational usage.</p>
<p>Additional Comments</p> <div style="border: 1px solid black; height: 40px; width: 100%;"></div>

Authorization

Additional staff to be notified of funding request: Add multiple staff members that need to be informed of the funding change request. No action is required of them. This field’s functionality is the same as the “Person in Position” field described above, except that multiple people can be listed. Once the Budget Officer has reviewed and approved the request an email will be sent to each person listed. They will have view-only access to the form.

Authorization	
<p>Additional staff to be notified of funding request:</p> <p><input type="checkbox"/> I certify that the information above is accurate and I am authorized to submit this request to the Budget Office for review/approval and subsequent review/approval by the Budget Officer(s) shown above. I understand and approve of the “Adjusted” amounts shown.</p>	<p><input type="text" value="Langdon, Janis; Cooley, Vicki; Hendrix, Amanda;"/></p> <p style="text-align: right;"></p> <p style="text-align: center;">SAVE</p>

At this point the Department submitter has three options:

1. Save – Click the “SAVE” button. This saves the form without submitting. The form is then available to the Department submitter to reopen, via the Personal Dashboard. They may then continue completing the form for submission.
 The status of the request is now “Saved”.



2. Approve and Submit – Check the box indicating, “I certify that the information above is accurate...” and click the “SUBMIT” button. The system captures the name of the person logged in, who is submitting the form, along with the date and time of submission. This information is stored in the form. The form is then submitted for Budget Office and then Budget Officer review and approval.

The Budget Officer listed in the Funding Information section for the account that provides the highest amount of funding will receive an email (sent daily until approval is entered) notifying them of the need to review the submitted funding request. They may view this request via the Personal Dashboard. This “Primary” Budget Officer then needs to provide approval or return the request to the Department submitter for necessary edits.

The Budget Officers for all other accounts in the Funding Information section will receive an email indicating that a Change Position Funding request has been submitted that involves an account for which they are responsible. These “Secondary” Budget Officers may view the submitted request via the Personal Dashboard. No further action is required of them.

While waiting for Budget Office review/approval the status of the request is “Pending Budget Office Approval”. Once Budget Office approval is provided, the status of the request changes to “Pending Budget Officer Review”.

Authorization

I certify that the information above is accurate and I am authorized to submit this request to the Budget Officer(s) for approval and the Budget Officer(s) shown above are accurate. I understand and approve of the "Adjusted" amounts shown.

 This form has been rejected and no further action is required. This will remove the form from the "pending" dashboard.


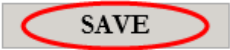
X Langdon, Janis

SUBMIT

3. Rejected Form – If the form has been submitted and was then rejected by the Budget Office or Budget Officer for necessary edits, the Department submitter can then re-open the form via the Personal Dashboard. The Department submitter may then either make appropriate edits and re-submit the form, or check the box indicating, “This form has been rejected and no further action is required...” and click the “SAVE” button. This may be done if the form had been saved and then determined to no longer be needed, or if the form had been submitted and rejected by the Budget Office or Budget Officer and is no longer needed. The form is not deleted but is saved in the system with a “Cancelled” status in the “Change Position Funding Request” section of the dashboard. No further is action needed.

The status of the funding request then changes to “Cancelled”.




Authorization	
<input type="checkbox"/> I certify that the information above is accurate and I am authorized to submit this request to the Budget Officer(s) for approval and the Budget Officer(s) shown above are accurate. I understand and approve of the "Adjusted" amounts shown.	 <input checked="" type="checkbox"/> This form has been rejected and no further action is required. This will remove the form from the "pending" dashboard.
	

To review information on the dashboard that's used by the Department submitter, see the [Personal Dashboard: My Budget Office Forms](#) section of these instructions.

SUBMITTING FUNDING CHANGES FOR MULTIPLE POSITIONS VIA EXCEL SPREADSHEET

Note: All information provided in the Batch Processing Details section must be the same for all position changes included in the spreadsheet to be attached.

To submit funding changes for multiple positions via excel spreadsheet:

- Select "I am entering information multiple positions with the same Budget Officer".
- Enter Budget Officer - May enter as "Last Name, First Name" or use Lookup as follows:
 - Click on the lookup icon 
 - Select the person's name in the list that's returned
 - Click "OK" to enter the person's name in the "Person in Position" field
- Department: Select Department name from drop-down list
- Effective Start date/Effective End date: enter dates via calendar app or by typing; Effective End date may be left blank if position is continuous.
 - Select the "Revert position back to prior funding..." checkbox to request that the positions' funding be reverted back to the most recent prior funding at the Effective End date. A Change Position Funding Form submission is not needed for this funding change to occur.
Note: This checkbox appears when an Effective End date is entered.
- Attach Excel spreadsheet that includes the following funding information for each position: Position Number, Employee Type, Person in Position (if applicable), UID (if applicable), Rate of Pay, Monthly/Hourly, Appt. End Date, Accounts, and Amounts. (Account(s), Budget Officer(s), and Amount(s) fields in the Funding Information section on the webform do not need to be completed. This information should be provided in the excel spreadsheet that is attached.)
- Add comments as necessary
- Certify information is accurate and submit
 - If request is rejected, you may cancel the request.

Note: if position funding changes have different Budget Officers or effective dates, then group requested changes and submit separately.



Batch Processing Details	
<input checked="" type="checkbox"/> I am entering information for multiple positions with the same Budget Officer.	
In order to submit batch changes, the following fields must be identical for ALL changes.	
Budget Officer:	<input type="text" value="Langdon, Janis;"/>
Effective Start:	<input type="text" value="4/1/2020"/>
Attachment(s):	<input type="button" value="Click here to attach a file"/> <input type="checkbox"/> Revert position back to prior funding once Effective End date is reached.
Department: <input type="text" value="Budget Office"/> Effective End: <input type="text" value="6/30/2020"/> (blank if indefinite)	
Please attach an excel spreadsheet that includes the following funding information for each position: Position Number, Employee Type, Person in Position (if applicable), UID (if applicable), Rate of Pay, Monthly/Hourly, Appt. End Date, Accounts, and Amounts.	
Additional Comments	
Authorization	
<input checked="" type="checkbox"/> I am entering information for multiple positions with the same Budget Officer.	
<i>X Langdon, Janis</i>	
<input type="button" value="SUBMIT"/>	

BUDGET OFFICE REVIEW/APPROVAL

Once submitted, the funding change request is reviewed by the Budget Office. The Budget Office will either approve the request as submitted or will work with the Department submitter on any necessary edits to the request.

Once Budget Office approval has been provided, the status of the request will change to “Pending Budget Officer Review”.

BUDGET OFFICER REVIEW/APPROVAL

Primary Budget Officer

- Review/Approval – After the Budget Office has reviewed and approved the request, the Budget Officer for the account with the highest amount of funding will receive an email (sent daily until approval is entered) directing them to review the Change Position Funding request that has been submitted. They will access the request via the Personal Dashboard. Upon review of the request submitted, the Budget Officer has two options:



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- Option 1: Check the box to certify that the position funding information is accurate and click the “Submit” button to indicate approval. The position funding request will then move on to the Budget Office for further processing.
- The status of the request then changes to “Held for Processing”.

Authorization

I certify that the information above is accurate and I am authorized to approve this request as the Budget Officer for the account above with the largest impact of this request. I understand and approve of the "Adjusted" amounts shown.

This request cannot be processed as shown above. This will send the request back to the form originator for modification.

X *Langdon, Janis*

SUBMIT

- Option 2: Check the box to indicate that the request cannot be processed as submitted, enter an explanation of the necessary edits, and click the “Submit” button. This will send the request back to the Department submitter for them to either edit and re-submit the request or cancel.
- The status of the request is now “Rejected”.

Authorization

I certify that the information above is accurate and I am authorized to approve this request as the Budget Officer for the account above with the largest impact of this request. I understand and approve of the "Adjusted" amounts shown.

This request cannot be processed as shown above. This will send the request back to the form originator for modification.

Explanation of Rejection:

X *Langdon, Janis*

SUBMIT

Secondary Budget Officers

- The Budget Officers for all accounts other than the one that provides the highest amount of funding will receive an email indicating that a Change Position Funding request has been submitted that involves an account for which they are responsible. These “Secondary” Budget Officers may view the submitted request via the Personal Dashboard. No further action is required of them.

To review information on the dashboard that’s used by the Budget Officers, see the [Personal Dashboard: My Budget Office Forms](#) section of these instructions.

Budget Office in lieu of Budget Officer

If the primary Budget Officer is not available to approve the form, they may send an email that states their approval of the changes to position funding to the Budget Office at UniversityBudgetOffice@ilstu.edu. The Budget Office may then attach the email and indicate approval to move forward with processing the request.

PROCESSING THE REQUEST

Once the Change Position Funding request has the necessary approvals, the Budget Office will process the request at the appropriate date. When processing is complete, all involved parties will receive an email to indicate the funding change has been completed.

REMINDER EMAILS

A system-generated email will be sent to the Department submitter for funding changes that have an Effective End Date. This email is sent prior to the Effective End date to remind the Department submitter that a Change Position Funding request is needed for the position to continue to be funded properly. The email includes instructions to create a new Change Position Funding Form using the Import button to access the prior funding request information.

PERSONAL DASHBOARD: MY BUDGET OFFICE FORMS

- Used by Department submitters and Budget Officers
- Includes link to create a new form
- Sections
 - Pending My Approval section
 - Department submitters – list of requests that have a status of “Saved” or “Rejected” (returned to the Department submitter for necessary edits).
 - Budget Officers (Primary) – requests that have been submitted for processing and have the status of “Pending Budget Officer Review”
 - Budget Officer Appointments, Change Position Funding Requests, Budget Center Access and Agency/Custodial Account Requests – any requests that have been partially or fully completed, or cancelled. Click on a request for “view only” access to the form.



STATUS LIST

All Position Funding Change forms will progress through the review/approval/completion process. A “status” is assigned for each step in the process. The status of each request may be found on the dashboard. See the Status list below, in progressing order:

- Saved – The Department staff creating the request has saved the form and will return to it later to complete or cancel the request.
- Cancelled – The Department staff that submitted the Position Funding Change Form has cancelled it. No further review/processing is needed.
- Pending Budget Office Approval – The Department has submitted the Change Position Funding request and it is waiting for approval by the Budget Office.



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- Pending Budget Officer Review – The Budget Office has approved the Change Position Funding request and it is waiting for the approval of the Budget Officer of the account that provides that greatest amount of funding.
- Rejected – The Change Position Funding request has been reviewed by either the Budget Office or primary Budget Officer and has not met approval. It is now waiting for the Department submitter to make necessary edits to the request and re-submit, or to cancel the request if it will not be processed.
- Held for Processing – All approvals have been granted by the Budget Office and primary Budget Officer. The request is waiting to be processed by the Budget Office.
- Processing Complete – The Change Position Funding request has been completed. The funding has been updated in iPeople.

QUESTIONS/ASSISTANCE

If you need assistance or have questions about completing the Change Position Funding Form, please contact the University Budget Office via UniversityBudgetOffice@ilstu.edu or by phone at 438-2143.