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.
### Process Steps

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
<th>Screenshot</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Navigation: Main Menu &gt; Core-CT HRMS &gt; Workforce Administration &gt; Smart HR Template &gt; Smart HR Transactions</td>
<td></td>
</tr>
</tbody>
</table>
| 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**. |
| 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**. |
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.

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 must equal 100.000000%.

Click Return to return to the template.
UConn/Core CT Job Aid: Funding Change
Version 1.0

<table>
<thead>
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<th>Action</th>
<th>Screenshot</th>
</tr>
</thead>
<tbody>
<tr>
<td>6</td>
<td>Back on the template, click <strong>Save and Calculate</strong>. At the bottom of the template, the updated funding information is available in the <strong>UConn Payroll Distribution</strong> section.</td>
<td><img src="image1" alt="Screenshot of Payroll Distribution" /></td>
</tr>
<tr>
<td>7</td>
<td>When the employee clicks <strong>Save and Calculate</strong>, the <strong>Attachments</strong> section will open at the bottom of the template. If applicable, search for and attach an attachment to include with the funding change.</td>
<td><img src="image2" alt="Screenshot of Attachment" /></td>
</tr>
<tr>
<td>8</td>
<td>When all the information on the template is complete, click <strong>Submit</strong>. This will route the Funding change template to the Department Approver for approval.</td>
<td><img src="image3" alt="Screenshot of Funding Change" /></td>
</tr>
</tbody>
</table>