Overview: This guide provides instruction on changing or deleting current or future funding distributions for a position. Three specific corrections will be covered in this guide:

1. Delete a newly added funding row
2. Change current or future funding distribution data
3. Delete entire funding distribution for a current or future funding begin date

The two principles for changing current or future funding are:

- If a funding distribution is in Proposed status, data may be corrected or deleted without adding a new funding row.
- For Approved funding distributions, adding a new funding row is required to change or delete any data in these rows.

Note: The screen shots used in this guide may not be representative of your access.

1. Navigate to the Funding Distribution page
   - Organizational Development
   - Position Management
   - Maintain Positions/Budgets
   - Funding Distribution

2. Funding Distribution search page displays
   - Enter one or more of the search fields
   - Click
   - If fields other than Position Number are used, multiple search results may display. Click on the desired position to open the Funding Distribution page.

Funding Distribution
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Position Number: begins with 178240
Business Unit: begins with
Department: begins with
Job Code: begins with
Reports To Position Number: begins with

Correct History

Search Clear Basic Search Save Search Criteria
3. Funding Distribution page displays

The following scenarios explain the three types of corrections that may be made to funding distributions for current or future funding begin dates.

### SCENARIO 1 – Delete a Newly Added Funding Row

Delete function may only be used on the **same day** that the funding row was added.

**For this scenario only:** Funding rows can be in either Approved or Proposed status.

**Do not** delete the first funding row created for a NEW position.

- Click the button at the top of the page, in the Funding section
- Click **Save**

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<table>
<thead>
<tr>
<th>Distribution</th>
<th>Find</th>
<th>First</th>
<th>1 of 3</th>
<th>Last</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Percent</strong></td>
<td><strong>Speed Type</strong></td>
<td><strong>Funding End Date</strong></td>
<td><strong>Speed Type Description</strong></td>
<td><strong>Fund</strong></td>
</tr>
<tr>
<td>1</td>
<td>+</td>
<td>70.000</td>
<td>11023149</td>
<td>Seismology Opr</td>
</tr>
<tr>
<td>2</td>
<td>+</td>
<td>15.000</td>
<td>12822137</td>
<td>Trades Teaching Lab</td>
</tr>
<tr>
<td>3</td>
<td>+</td>
<td>15.000</td>
<td>12822137</td>
<td>Trades Teaching Lab</td>
</tr>
</tbody>
</table>
**SCENARIO 2(a) – Correct Current or Future Funding Distribution Data in PROPOSED status**

Funding may only be corrected if the funding begin date is for a current or future pay period.

Not necessary to add a new funding row - information may be corrected by typing over data in open data fields.

- Correct data as needed
  - Funding Begin Date
  - Percent/Amount
  - Speed Type
  - Funding End Date
- Add or Remove rows by clicking the buttons in the distribution section
- Click [Save]

**SCENARIO 2(b) – Correct Current or Future Funding Distribution Data in APPROVED status**

Funding may only be corrected if the funding begin date is for a current or future pay period.

- Click [+] in the Funding section to add a new funding row
The new row will have a default begin date for the current payroll period, which can be updated.

If the new funding row is not needed, click the button by the Funding Notes icon to remove it.

Any current or future funding will now be in Proposed status, and the funding details may be updated as needed.

- Correct data as needed
  - Funding Begin Date
  - Percent/Amount
  - SpeedType
  - Funding End Date

- Add or Remove rows by clicking the buttons in the distribution section

- Click Save
SCENARIO 3 –
Delete an entire funding distribution (for current or future begin dates)

Funding may only be deleted if the funding begin date is for a current or future pay period.

Not necessary to add a new funding row for Proposed distributions.

A new funding row is required for Approved distributions (this action places all current and future distributions in Proposed status).

To remove all funding rows for this Funding Begin Date, click the Delete button next to the Funding Notes icon.

Click Save.
4. Troubleshooting

- An error message will display if a user attempts to delete a funding string or any portion of a funding distribution for a payroll period that has already been processed.

- The same message will display if a user attempts to delete any portion of a current/future funding distribution that is Approved.

See the Step-By-Step guides available for PET/Retroactive Funding Change and Correction PET and for more information on these options.

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**Microsoft Internet Explorer**

- Funding distribution rows for past payroll periods cannot be deleted (21000, 33)
- To make corrections to payroll distributions for past payroll periods, create a payroll expense transfer using either the PET/Retroactive Funding Change or Correction PET pages.
- To update current or future funding distribution data, insert a new funding row using the [+] button at the top of the Funding Distribution page.

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Change Current or Future Funding Distribution complete
See page 7 for additional funding tips
HRMS Tips for using Funding Distribution

- For a **NEW position**, Funding Begin Date must equal position effective date.
- Add a new Funding Row for each **Funding Begin Date**.
- **Entered Date** is the date the funding was added. The first row added on this day will always be **Sequence 0**. Any additional rows added on the same day will increase the sequence number by 1 for each row entered. Rows entered on following days will have an updated Entered Date, and the Sequence will start at 0 again.
- **Correct or Update Current/Future Funding** –
  - If funding for a current or future payroll period is in **Proposed status**, type over the existing data **without adding an additional Funding row**, and resave. If desired, the entire funding row for a current/future funding begin date may be **removed entirely** by clicking the Delete button by the Funding Notes icon.
  - For an **Approved** current or future funding distribution, **add a new Funding row**. The distribution will then display in **Proposed status**. Type over the existing data, add/remove rows as needed, and resave. (Note: this process will insert an additional funding row. If the row is not needed, delete it.)
- **Payroll Expense Transfers with Retroactive Funding Changes (PETR and PETP)** – the PET process will add a new funding row to the most current Entered Date, and the Sequence will be increased. This is the only situation where the Entered Date will not be updated to reflect the date the row was added to the funding page.
- **Funding strings** – each new Funding Row adds to the top of the previous funding components, to create a new funding string. When funding is added, **any funding distribution with a begin date in current or future payroll periods will be saved in Proposed status**. However the underlying components of the Funding String will retain their original approval status. The system no longer assigns a proposed status to the entire funding string when a row is added, nor is the whole string approved when one component is approved.
- **No Action Taken** – this status is assigned to any current funding components that are not approved before the current payroll is processed. Once in No Action Taken status, the funding row can not be approved by anyone, including ES staff.