

UCPATH FUNDING CHANGE REQUEST

Best Practices for Form Completion, Tips and Troubleshooting

This form replaces the UCCE Payroll Data Change Request form. Please implement the use of this UCPATH Funding Change Request for all future funding changes.

If an employee's employment end date (extension) or % of time worked needs to be changed, please contact Staff HR and/or use the HR forms for that action. (The Funding Change Request may no longer be used for those purposes.)

EMPLOYEE INFORMATION

Please type (form is fillable) or write legibly, completing as much information as is available.

Employee Name*: Required

UCCE Location*: _____ County is required.

Employee's FTE is the % of time the employee is currently working. Remember any change to this % (increase/decrease) must be submitted as a request to Staff HR and cannot be requested on this form.

A list of Home Department #s is available for reference.

All employees are assigned a **Position #**. You will eventually know position numbers assigned to employees in your UCCE location. Currently this # is not required.

All employees will be given a new **Employee ID number**. You will eventually know employee numbers assigned to employees in your UCCE location. Currently this # is not required.

CURRENT FUNDING

This section represents the current funding for the employee as currently reflected in the UCPATH system. Each row must have its own end date, even though it may be the same date as other rows. Complete as many fields as possible, recognizing that those marked with red asterisks (*) are required.

ERN Code: DOS (description of service) codes formerly used in PPS have been replaced by ERN codes. Will usually be "REG" for staff and academics. An expanded list of ERN Codes will be provided in the near future.

Chart: "L" represents UC ANR and will be used in most cases. Occasionally employees working on other campuses in collaboration with UCCE Advisors will be assigned to other campus accounts (e.g. Davis = 3).

Chart-Account: Preceded with an L, then a seven-character account number. (L-###xxxx)

Subaccounts: Not widely used in UCCE locations for staffing. Only required if location uses them.

Budget Sub: In UCPATH, the following codes (formerly known as object consolidations) are used. However, they are not required when completing the form at the UCCE location.

00 = Budgeted Academic (formerly SB06)

01 = Budgeted Staff (formerly SUBS)

02 = Non-budgeted academics and staff (formerly SUBG)

Project: Not widely used in UCCE locations for staff assignments.

Funding Start Date: First date that the employee's salary is to be charged to the current account. Ignore shaded fields.

Funding End Date: Final date that the employee's salary should be charged to the current account. If there is no change from what is currently reflected in the employee record, please provide the same date to confirm the end date.

Funding %. The total of the percentages assigned for all funding lines must equal 100%. The total here is not the % of time that the employee is working as designated in the EMPLOYEE INFORMATION SECTION above. (Even if the person is working half-time or 50%, the total %'s must = 100%).

NEW / PROPOSED FUNDING

Represents the new funding that the employee will be assigned in future pay periods.

The new entries will completely replace all the current funding entries on the new start date so it is important to list all of the employee's accounts used to fund the position, not just the ones that are changing. Complete as many fields as possible, recognizing that those marked with red asterisks (*) are required.

ERN Code: DOS codes formerly used in PPS have been replaced by ERN codes: Will usually be "REG" for staffing. Some exceptions apply.

Chart: "L" represents UC ANR and will be used in most cases. Occasionally employees working on other campuses with UCCE Advisors collaborating with other campuses will be assigned to campus accounts (e.g. Davis = 3).

Chart-Account: Same as above

Subaccounts: Same as above

Budget Sub: Same as above

Project: Same as above

Funding Start Date: For each account, this will be the date after each employee's change from the CURRENT FUNDING section. Even if no change in one or more of the rows, it is still necessary to list all accounts with dates to ensure pay is coded to the correct account. The BOCK needs to be able to confirm the continuation of all funding sources. **The funding start date must be the same for all rows/lines.**

Funding End Date: Projected (future) date of when the employee's funding is to be ended from each account (e.g., the end date of the grant account, or at the end of a BW or MO pay period). For funding changes with no end date, continue to use 99/99/99 or leave blank.

Funding %. The total of the percentages assigned for all funding lines must equal 100%. The total here is not the % of time that the employee is working as designated in the EMPLOYEE INFORMATION SECTION above. (Even if the person is working half-time or 50%, the total %'s must = 100%).

APPROVAL SIGNATURES

SUPERVISOR/PI*. Required, with PI acknowledging and taking responsibility for the employee working on the grant or project the committed % of time.

COUNTY DIRECTOR*. Required, allowing the CD to acknowledge the commitment of the PI and UCCE to the employee's change of funding.

OTHER: Required if using an account from another UCCE/campus, with the other PI providing his approval for ANR to use that account.

Statewide Program Director's or Vice Provost's signature could be required if using a non-UCCE account.

Forms completed to this point are to be submitted to the email address:

UCCEpositionfunding@ucanr.edu ([update email address](#))

BOC BUSINESS MANAGER*: Approval by Business Manager for the BOCK, then is forwarded to the ANR Payroll unit for entry.

BOC Business Manager can coordinate any additional signatures if required, but if they are already included, that expedites the process.

Sending the form to ANR Payroll Unit first prior to sending to the BOC Business Manager also delays the process.

UCCE location is cc'd when form is forwarded to ANR Payroll for entry into UCPATH.

OTHER NOTES AND TROUBLESHOOTING

As we gain more access to and knowledge about reports in UCPATH, more information will be available to us for completion of this form.

Avoid delays in processing time!

- Verify that all approving signatures are included prior to submission to the BOCK Business Manager.
- Ensure that if using a contract/grant account, specific funding dates are within the project beginning and end dates.
- Ensure that funds are available in each account provided for New/Proposed funding.
- Allow a minimum of **3-4 weeks** for processing time from the day the BOCK receives the form and the effective date of the request.

Please submit one Request for each funding change. While this is a temporary request, we want to ensure our 'future dating' processes are well defined and operational in UCPATH before accepting future dated requests.

While it is important to note that while funding entries may end for an employee, the employee will continue to get paid via UCPATH as long as the job is active. HOWEVER, the earnings and benefits will post to a default UCCE account. We would then need to create a Direct Retro (new term for salary expense transfer) to transfer the expense to the appropriate account. To avoid unnecessary direct retro actions, please watch carefully to ensure that no employee's funding ends. We will be providing reports to assist you with that analysis as soon as they become available.