

Funding Change Form Instructions (DocuSign version)

A Funding Change form is used to change payroll funding information for a current and/or future pay period. The form should be submitted prior to the Payroll Proof deadline per the Payroll calendar.

Routing Screen:

PowerForm Signer Information - Complete the routing fields based on the employee type (ex. Grad, PTA, hourly, benefitted). All forms will automatically route to the Budget/Ag Budget Office.

Enter Employee Name/Effective Date/Your Name and YOUR Email – Enter the Last Name of the employee the Funding Change is being completed for, the effective date and the Last Name of the employee initiating the form. This will allow the email subject line to read “Funding Change form for Doe/1/31/19/Ketterling”. In the ‘*Your Email*’ field enter the address of the employee initiating the Funding Change. This will allow the initiator to receive notification when the form has been completed.

Examples of routing based on employee type:

Hourly - Department > Dean (if applicable)

Grad - Department > Dean (if applicable)

PTA - Department > Dean > Provost

Benefitted - Department > Dean > Provost/VP

Funding Change form fields:

Employee Information – Enter Employee First Name, Employee Last Name, Effective Date of Change, Employee ID, and Empl Rcd.

Position Information – Enter Dept ID, Dept Name, Position Number and Job Code. Select the Type of Change as Permanent or Temporary. Permanent changes will cross over a fiscal year. Temporary changes will only be for the current fiscal year. Select Pool Position as Yes or No. Attach any additional documentation that may be necessary. Enter required comments.

Current – Enter the current funding information and either budget or percentage split.

New – Enter the new funding information and budget or percentage split that should be used for the employee.

Budget Transfer – If a budget adjustment is necessary enter the increase/decrease information.

Funding Change form spreadsheet:

The Funding Change form spreadsheet template is to be used by departments that need to change funding for multiple employees in the same department on a temporary basis. The spreadsheet should be completed showing the new funding sources and amounts and submitted as an attachment on the Funding Change form. The required fields on the form should indicate the effective date, Dept ID, Dept Name, Temporary change and comments. The Name fields should indicate “See Attached”. All other required fields (Employee ID, Employee Rcd, Position Number, Job Code) can be completed with an assortment of the required amount of numbers.

Additional Resources:

Funding Summary Report Job Aid -

https://www.ndsu.edu/fileadmin/budget/docs/NDSU_Funding_Summary_Report_Job_Aid.pdf