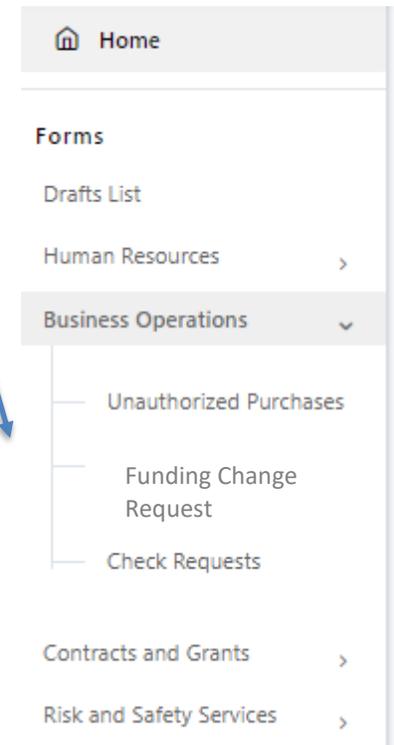


**Business Operations Center  
Workflow Automation Application  
Funding Change Request**

**Funding  
Change  
Request**

- **ADD LINK TO WFA SYSTEM [wfa.ucanr.edu](http://wfa.ucanr.edu)**
- To Initiate/Submit a Form: Left menu -> select Business Operations -> Funding Change Request
- To be used when the accounts for the funding of an employee need to be changed, update the end dates or the percentage allocation distribution for each account.
- To be used for Honorarium payment requests, Fellowships/Scholarships/Stipends payments, or Entertainment Vendor Requests, including Facility Use Agreements.



**Page 1**

- Enter employee Name, UC PATH Department, Employee ID and Position ID.
- Enter Department/Unit Director that will need to approve the form
- Enter the Supervisor of the staff or the Principal Investigator if the account used is an award.
- Select Fiscal Officer based on your UCCE Business Partner Team or SWP Business Manager.
- Select Additional approvers in case of more than one PI, Statewide Program Director approval needed, or an additional fiscal officer needs to approve.

- Employee Information
- Current Funding
- New/Proposed Funding

### Funding Changes Request

Print

● Initiator  
In Progress

Supervisor  
Not Started

Director  
Not Started

Additional Approvers  
Not Started

Fiscal Officer  
Not Started

New Additional Approvers  
Not Started

Payroll  
Not Started

**Employee Name\***

**Director\***

**Supervisor/PI\***

**Identify Routing\***

UCCE  
 Other

**Additional Approvers**

 +

**Attach any Documentation**

**Drag and drop files or click here**

**UCPath Department\***

**Employee ID\***

**Position ID**

**Fiscal Officer\***

**Justification**

**Page 2**

- Enter Current Funding in UC PATH: Earn Code (REG), Chart (L), Account, Sub-Account if applicable, Budget Sub (00 for central funding accounts and 02 for all other accounts), Project code if applicable, Funding Effective Date, Funding End Date, and % Distribution.
- Use plus sign to add more lines if various accounts are used.

Funding Changes Request Print

- Employee Information
- Current Funding
- New/Proposed Funding
- Approvals

### Current Funding

Action	Earn Code	Chart	Chart-Account	Sub Account	Budget Sub	Project	Funding Effective Date*	Funding End Date	%Dist
+ -	REG	L	345F521	test	999		7/1/2021	9/30/2021	

**Page 3**

- Enter New/ Proposed Funding in UC PATH: Chart (L), Account, Sub-Account if applicable, Budget Sub (00 for central funding accounts and 02 for all other accounts), Project code if applicable, Funding Effective Date, Funding End Date, and % Distribution.
- Leave Funding End Date blank if account does not change year after year (i.e. EFNEP, County Support Account, Central Budget Account.)
- Use plus sign to add more lines if various accounts are used.
- Submit form with green button in lower right-hand corner.

Funding Changes Request Print X

### New/Proposed Funding

Action	Chart	Chart-Account	Sub Account	Budget Sub	Project	Funding Effective Date	Funding End Date	%Dist
+ -						mm/dd/yyyy	mm/dd/yyyy	

## Approver Page

- To Approve a Form: Left menu -> select the Pending Approvals menu. Click View next to the form.
- Supervisor reviews and approves
- Principal Investigator approves if account used is an award
- Director reviews and approves.
- Additional Approvers
- Fiscal Officer reviews and Approves
- Payroll enters New Funding in UC PATH, and enters transaction number in the comments as confirmation of task completed.



- Employee Information
- Current Funding
- New/Proposed Funding
- Approvals

### Funding Changes Request Print X

**Supervisor** **Date**

Anne Scott 07-09-2021 10:30

**Supervisor Comments**

Test

**Director** **Date**

Katherine Hanke 07-09-2021 10:32

**Director Comments**

Test test

**Additional Approvers** **Date**

Jolynn Miller 07-09-2021 10:36

**Additional Approvers Comments**

Yipee Skippee

**Fiscal Officer** **Date**

Kiran Maheshwarapu 07-09-2021 10:37

**Fiscal Officer Comments**

Approving form during UAT

**Payroll** **Date**

Anne Scott 07-09-2021 10:43

**Payroll Comments**

- ✓ Initiator
  - Submitted
  - Regina Verreos
  - 07-09-2021 10:25
- ✓ Supervisor
  - Approved
  - Anne Scott
  - 07-09-2021 10:30
- ✓ Director
  - Approved
  - Katherine Hanke
  - 07-09-2021 10:32
- ✓ Additional Approvers
  - Approved
  - Jolynn Miller
  - 07-09-2021 10:36
- ✓ Fiscal Officer
  - Approved
  - Kiran Maheshwarapu
  - 07-09-2021 10:37
- ✓ Payroll
  - Approved
  - Anne Scott
  - 07-09-2021 10:43