CALIFORNIA STATE UNIVERSITY, CHICO
BUDGET OFFICE

KENDALL HALL ROOM 201
CHICO, CA 95929-0241
530-898-5921
www.csuchico.edu/bud

Funding Source Changes

This guide will detail how a department can request funding source changes for an individual or group of employees.

NOTE: Remember that browsers act differently, you will have to know how your browser saves and works – these instructions are general.

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Prepare Funding Source Change document

1. **Download the Funding Source Change form from the Budget/Position Management website.**
    a. Complete all fields required using Microsoft Excel. You can list up to 35 changes on one sheet.
        i. Effective Date of the requested changes.
        ii. Employee Information:
            1. Chico State ID
            2. Empl Rcd # - found in PeopleSoft HR Job Data or CSU ID Search
            3. Legal Name (Last Name, First Name) – as found in PeopleSoft HR
            4. CMS Position #
        iii. Old Funding Information – Information specific to the Empl Rcd # in step ii. This information can be found in PeopleSoft HR Job Data and Position Management.
            1. SCO Unit #
            2. Dept ID
            3. Fund
            4. Program
            5. %
        iv. New Funding Information – list the details of where you want the funding to be.
            1. SCO Unit #
            2. Dept ID
            3. Fund
            4. Program
            5. %

NOTE: If you are splitting funding, list the Employee and Old Funding Information on each line with the New Funding Information showing the different Fund, Program & %. See Example:
NOTE2: If you need to report on more than 35 people at one time, you will have to process through Adobe Sign one page at a time. The Field template cannot be put on multiple pages. So, save your Excel forms one page at a time.

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Funding Source Cha

Effective:

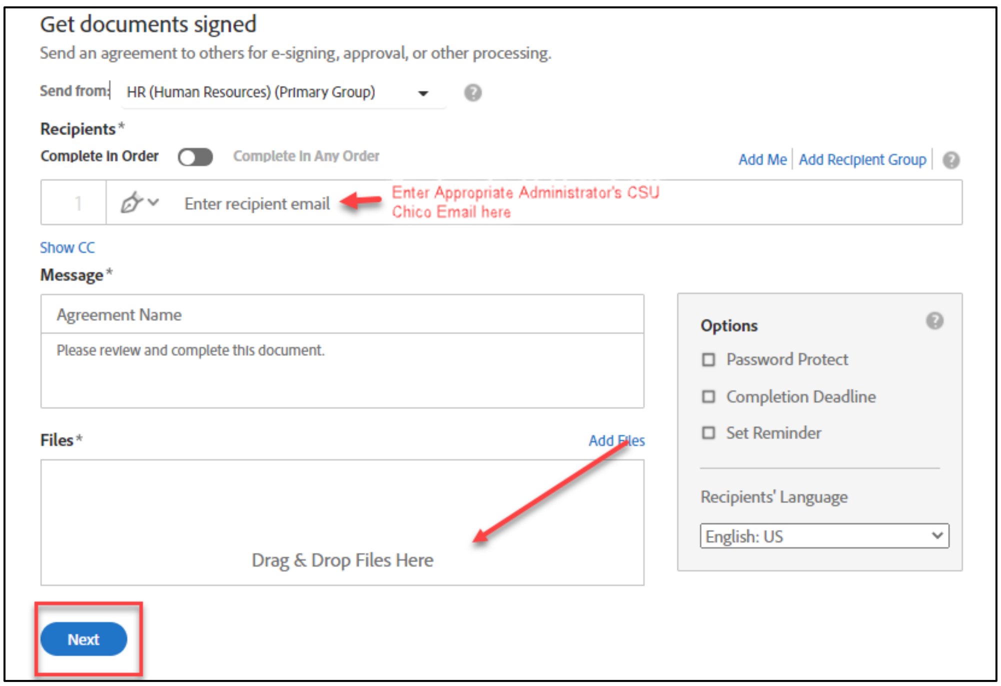
Employee Information			Old Funding Information					New Funding Information					Budget Office Use Only	
Empl Rcd	**Legal Name (Last Name, First Name)**	**CMS Position #**	**SCO Unit**	**Dept ID**	**Fund**	**Program**	**%**	**SCO Unit**	**Dept ID**	**Fund**	**Program**	**%**	**Note/Comment**	**Budget Processed**
1	test, fund split	00001234	123	D#####	G1006	XX	100%	123	D#####	G1006	XX	50%		
1	test, fund split	00001234	123	D#####	G1006	XX	100%	123	D#####	H4567	YY	50%		

Route for required signature(s)

Route file for required signature(s) from appropriate administrator. See this tutorial: Send documents for signature with Adobe Sign

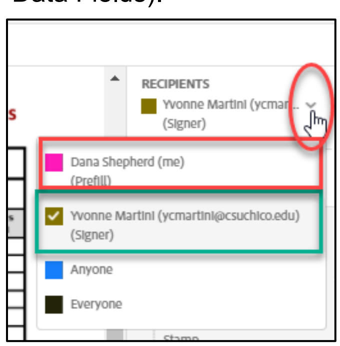
Get Documents Signed dialog

1. Using Adobe Sign – Click Request Signature
2. Enter the Managers email in the recipients # 1
3. Drag your Excel Funding Source Change document to the Files box and click Next



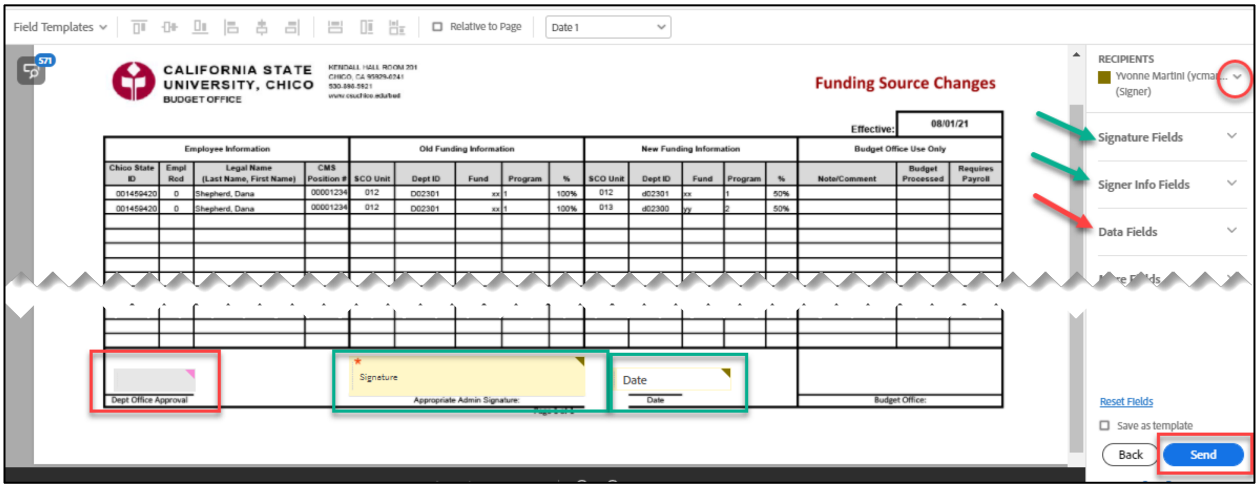
Signature location box

1. Use the **Recipients** dropdown to select (you) Prefill (circled in red) and drop a Text box in the Dept Office Approval section (found under Data Fields).



2. Use the **Recipients** dropdown to select the Appropriate Administrator (circled in green) and drop the Signature Block box for Appropriate Admin Signature (found under Signature Fields).

3. Drop a date box in the date section (found under Signer Info Fields).



NOTE: The action boxes have color flags that correspond to the recipient who will complete that step.

4. Click the **Send** button. You will then be able to enter your Initials in the text box for Dept Office Approval and click the **Click to Send** button.

Email to the Budget Office

1. After you receive the signed document back from Adobe Sign, email as an attachment to finlcd@csuchico.edu.
   a. Click and hold the attachment in the Adobe Sign email and drag it to a new email message.
2. Please note if there is a large number of records being updated (i.e. 15 or more) the excel version may be requested to help Budget and Payroll sort for processing.

Managing your Adobe Sign document.

1. Please note that these videos show a slightly different Adobe Sign interface, but the concepts and actions are all present in our version.
   a. Video – Manage and track agreements sent for signature
   b. Video - Manage Adobe Sign Documents