ConnectCAROLINA

Funding Swaps

Overview

The Funding Swap ePAR form is used to enter changes to funding for an existing position or appointment. You can change the dollar amount for an existing funding source, remove an existing funding source, and add a new funding source.

You need the following information for each new funding source:

- The budget amount
- The effective date
- The funding end date, if known or if using an OSR fund
- The chartfield string that identifies the funding source, or its associated combination code (combo code)

You may also include the following for a funding source:

- An indication whether it is part of the permanent budget
- The Perm Budget amount if different from the Budget Amount

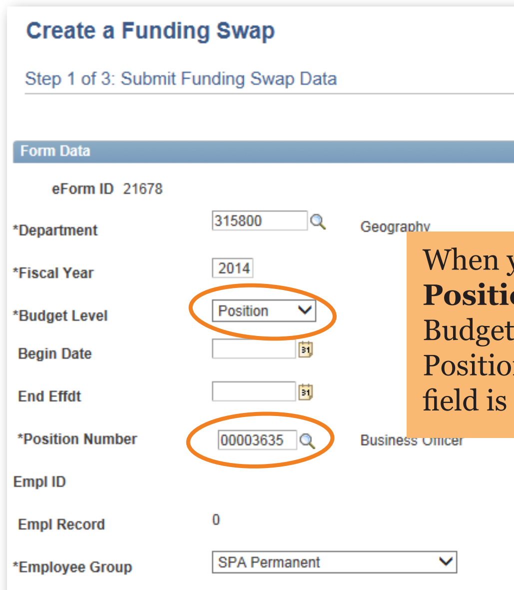
Navigation

HR WorkCenter > ePAR Home Page > Start a New ePAR > Funding Swap

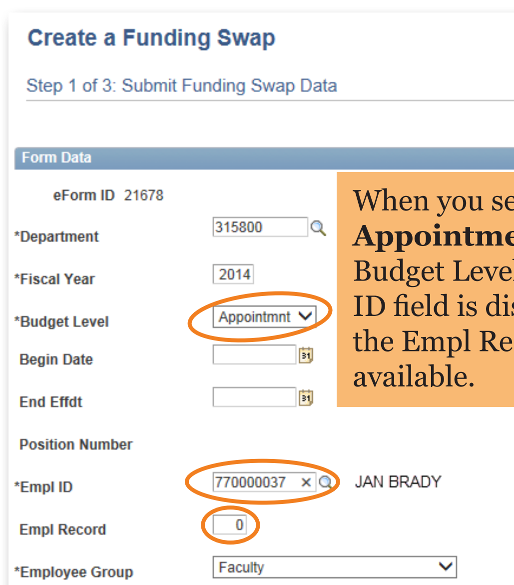
Step 1 of 3: Submit Funding Swap Data

Complete these fields on the Step 1 of 3: Submit Funding Swap Data page:

- Department
- Fiscal Year
- Budget Level
- Position Number or Empl ID
- Employee Group



When you select **Position** for the Budget Level, the Position Number field is displayed.



When you select **Appointment** for the Budget Level, the Empl ID field is displayed and the Empl Record field is available.

Step 2 of 3:
Funding Swap

The Step 2 of 3: Funding Swap page shows the appointment or position's funding history for the fiscal year.

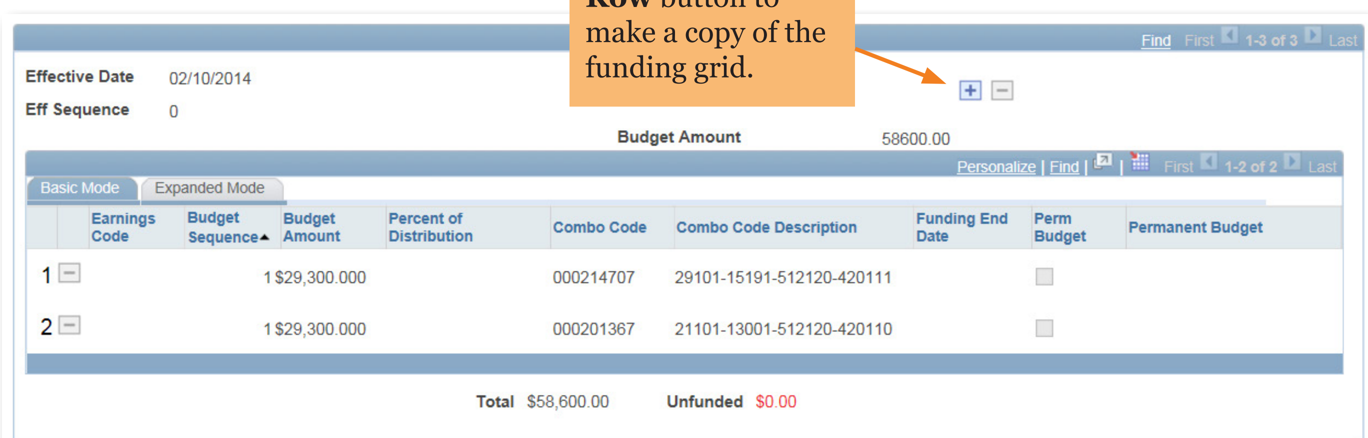
The funding is displayed in grids. If an employee's funding is changed during the year, a separate grid shows the employee's funding sources each time funding was modified. Each of these grids has an Effective Date indicating the first day the funding in the grid was used. Individual funding lines may have funding end dates specified.

When there is more than one funding grid, they are displayed in reverse chronological order with the oldest grid at the bottom of the page. The grid at the top shows the employee's current funding.

To preserve the employee's funding history, the system does not let you make any changes to the funding grids that are displayed when you open the page. Instead, you copy a grid by clicking on the **Add a Row** button located above the grid, and then make changes to the copy.

Note: If you are changing a funding source that has already been used to pay an employee, refer to the Retroactive Funding Swaps document for help completing Step 2 of 3 of the Funding Swap form.

Click the **Add a Row** button to make a copy of the funding grid.



Step 2 of 3 (Continued): Funding Swap

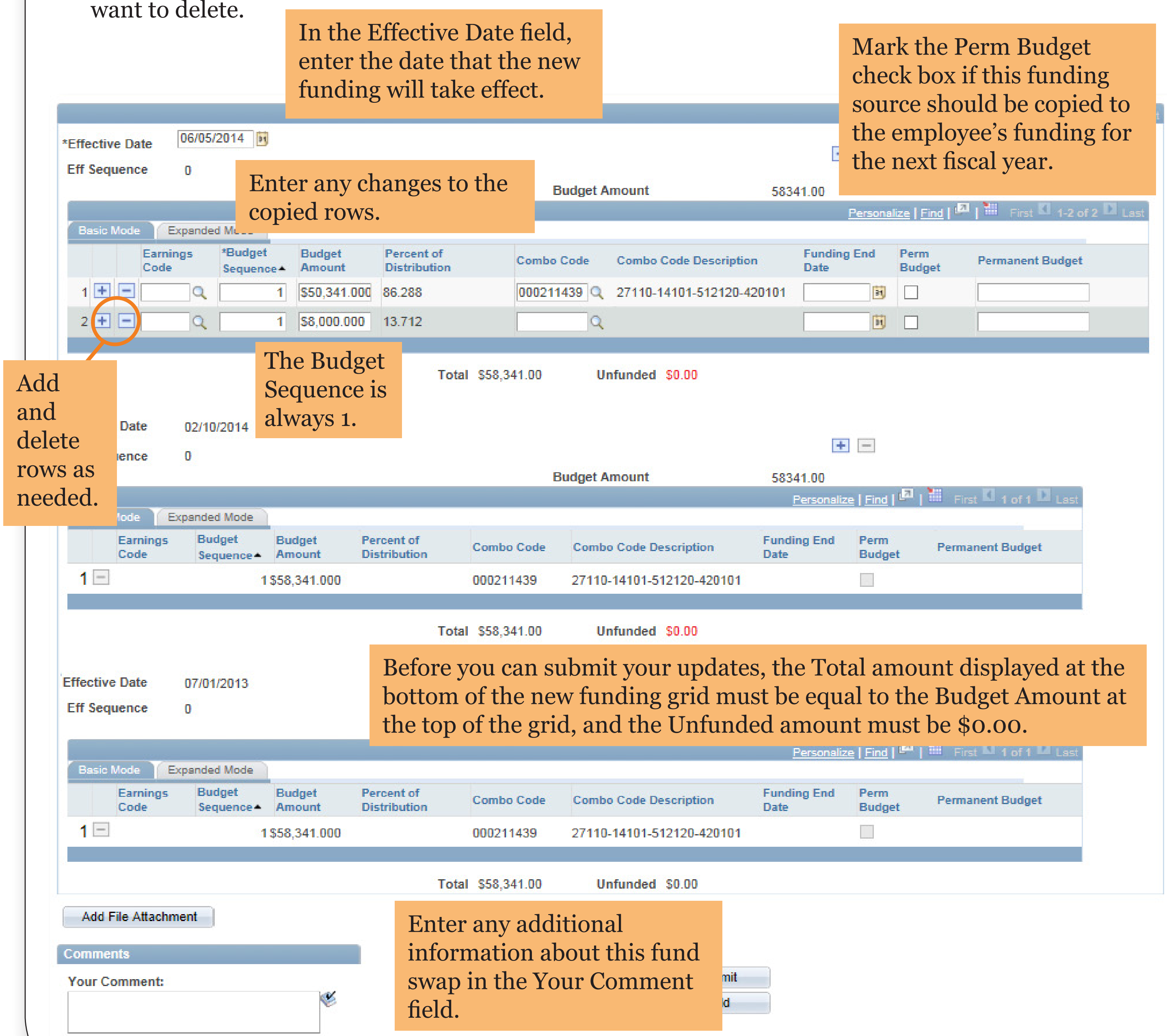
When you click on the **Add a Row** button above a grid, the system opens a copy above the original grid. In this copied grid, you can:

- Change an existing funding source by making changes to the copied funding source information.
- Add a new funding source by clicking on the **Add** button in the copied grid and entering the funding information.
- Delete a funding source by clicking on the **Delete Row** button for the funding source you want to delete.

For more information about entering retroactive changes to funding sources, see the Retroactive Funding Swaps document.

Also note:

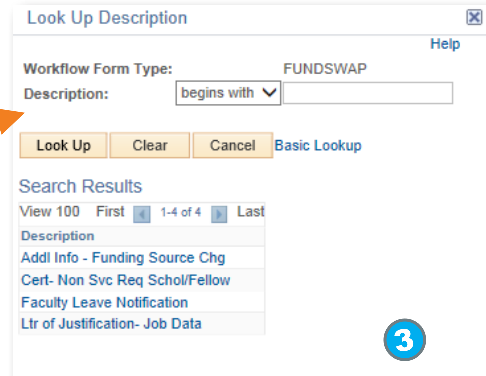
- Earnings Code is not a required field
- Budget Sequence defaults to, and should remain, 1
- Enter the Permanent Budget Amount only if it differs from the Budget Amount

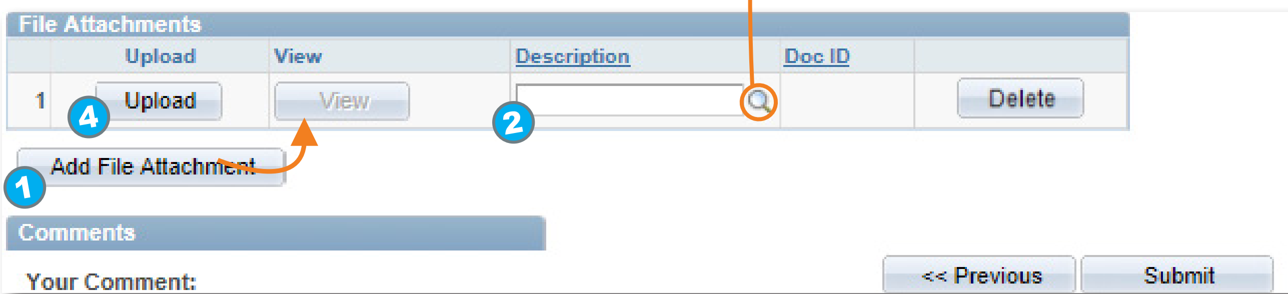


Step 2 of 3 (Continued): Funding Swap

Attaching a File

1. Click on the Add File Attachment button.
2. Click on the lookup icon to open the Look Up Description window.
3. In the Search Results, click on the description of the attachment.
4. Click on the Upload button and choose the file to be uploaded.





Step 3 of 3: Form Finalized

When you click on the Submit button, ConnectCarolina performs an edit check to validate the changes. The system will display the Step 3 of 3: Form Finalized page and submit your fund source to workflow if:

- The Total amount of the new funding grid is equal to the Budget Amount of the grid.
- The Unfunded amount of the new funding grid is $0.00.
- The funding sources pass the edit checks for the payment type.
- The budget has funds available for the payment.