

Fund Change Entry Guide

Accessing the Form

- 1) Log in to the [ARC Service Portal](#).
- 2) Locate and click on the “Fund Changes” dropdown in the top header.
- 3) Click “Submit New Fund Change” as seen below.

Click “Submit New Fund Change”



NOTE: If you do not see the “Fund Changes” menu, you’ll need to request access to use the form. Please submit a request to the VCHS BI team using the [Access Request Form](#).

Using the Form

To use the Fund Change Form, please follow the steps below:

Selecting a Fiscal Year and Job

- 1) Select Fiscal Year and UC Path Job

The screenshot displays the 'ARC Fund Change Form' interface. It includes a header with the title and a sub-header 'To get started, click on the search for a UCPath Job below.' Below this are two dropdown menus: 'Choose a Fiscal Year' and 'Choose a UC Path Job:'. A yellow callout box with the text 'Select desired Fiscal Year' points to the 'Choose a Fiscal Year' dropdown, which is open to show the years 2023, 2024, and 2024. A second yellow callout box with the text 'Search for desired employee' points to the search input field below the dropdowns. The search input field contains the text 'yohei'. Below the search input is a table of search results.

CELLULAR & MOLECULAR MEDICINE	003394	ASST PROJ SCIENTIST-FY
MEDICINE	003252	POSTDOC-EMPLOYEE
PEDIATRICS	003252	POSTDOC-EMPLOYEE

- 2) If necessary, review the Job Details and Form instructions in the section that appears. If you need to change to a different employee or Fiscal Year, you can click “Select a Different Job” from the Request Status section.

ARC Fund Change Form

To get started, click on the search for a UCPath Job below.

Job Details	
Employee ID	██████████
Name	██████████
Department	Cellular & Molecular Medicine
Job Code	003394
Job Title	ASST PROJ SCIENTIST-FY
Effort	1
Position Number	██████████

Job Details, Form Instructions, and Request Status will appear in the form header

Form Instructions

Please add any necessary chart strings to the funding profile in the first table below, then make the necessary modifications to funding percentage in the second table by month.

Note: This form is not to be used to submit effort or salary changes. Please use the appropriate intake forms for these changes separately.

Request Status: New Fund Request

Please add funding sources and modify distribution percentages for the selected position below. To select a different position, please use the following button:

Select a Different Job

Adding and Deleting Chart Strings

- 1) Refer to the “Chart String Information” Section.
- 2) Review the pre-populated chart strings to ensure your chart string isn’t already available.
- 3) If not already present, perform the following steps:
 - a. Click “Add Chart String” button to add a new chart string

Chart String Information

Key	Combo Code	Project/Task	Project Name	Entity	Financial Unit	Fund	Project	Task	Funding Source	Location	Function	NIH-Capped?	Requester Added?	Actions
1	000675587	2001974/1	██████████	16130	3000177	20700	2001974	1	7027255		440	No	false	N/A
2	000423492	1006501/1	██████████	16130	3000177	20001	1006501	1	7032811		440	Yes	false	N/A

Click here to add chart string

Add Chart String

- b. Search and select desired chart string to add then click “Add Chart String”

Chart String Information

Key	Combo Code	Project/Task	Project Name	Entity	Financial Unit	Fund	Project	Task	Funding Source	Location	Function	NIH-Capped?	Requester Added?	Actions
1	000675587	2001974/1	██████████	16130	3000177	20700					440	No	false	N/A
2	000423492	1006501/1	██████████	16130	3000177	20001					440	Yes	false	N/A

Select a Chart String:

Add Chart String
Cancel

- 4) If needed, delete any chart strings that were not pre-populated by clicking the “Delete” button in the last column of the table.

Chart String Information														
Key	Combo Code	Project/Task	Project Name	Entity	Financial Unit	Fund	Project	Task	Funding Source	Location	Function	NIH-Capped?	Requester Added?	Actions
1	000675587	2001974/1	[REDACTED]	16130	3000177	20700	2001974	1	7027255		440	No	false	N/A
2	000423492	1006501/1	[REDACTED]	16130	3000177	20001	1006501	1	7032811		440	Yes	false	N/A
3	000364692	1008851/31	[REDACTED] Research	16110	1000168	F1643	1008851	31					true	Delete

[Add Chart String](#)

Click here to delete selected chart string →

Making Fund Changes

Once the appropriate chart strings have been added to the form, follow the below steps to modify monthly percentages.

- 1) Locate the correct chart string to modify and the starting month of the modification on the “Monthly Distribution Information” table.
- 2) Make the appropriate modifications to the pre-set percentages on the form. Once made,
 - a. NOTE: changes made for a certain month will be assumed to be effective on the first of the month. For mid-month effective dates, please note the month and chart string key and describe the effective date in the “Notes” field at the bottom of the form.
 - b. Changes will need to be made for all months that the percentage will be effective. Auto-fill is not available at this time.
- 3) Confirm that the Total and Expected Total at the bottom of each month match and are highlighted in green. Any mismatches will highlight in red and will need to be resolved before the form can be submitted.

MAY	JUN	JUN
75	75	100 (+25)
25	25	0 (-25)
0	0	100
0	0	100
0	0	0

Double click to change value

Monthly Distribution Information													Select a Scale:
Key	Combo Code	Project/Task	JUL	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	JUN
1	000675587	2001974/1	75	75	75	75	75	75	75	75	75	75	75
2	000423492	1006501/1	25	25	25	25	25	25	25	25	25	25	25
TOTAL			100	100	100	100	100	100	100	100	100	100	100
EXPECTED TOTAL			100	100	100	100	100	100	100	100	100	100	100
DIFFERENCE			0	0	0	0	0	0	0	0	0	0	0

Total should equal to Expected Total in order to submit fund change

Work Notes, Comments & Person(s) to Send Confirmation:

[Submit Fund Change](#)

Examples of Valid vs. Invalid Changes

MAY	JUN	MAY	JUN
75	75	75	100
			(+25)
		25	25
100	75	100	125
100	100	100	100
0	25	0	-25

Differences in totals will turn cells red

Submitting Your Fund Change

Once the above steps are complete, add any desired notes or comments then click the “Submit Fund Change” button to submit to ARC for review. This step will create an ARC case.

Work Notes, Comments & Person(s) to Send Confirmation:

Add notes or comments as here → **Press 'Submit'** → **Submit Fund Change**

Invalid Submissions

Several possible errors might occur when completing the form, a few of which appear below. Please resolve any errors prior to submitting

ucsdhealth.service-now.com says

Unable to submit - no changes made to pre-existing funding or chart string cap rates.

A change is required to submit the form

ucsdhealth.service-now.com says

Unable to submit - please ensure all months with effort are fully funded. NOTE: Do not use this form to submit FTE changes.

Fund change will not accept differences in total amount

Valid Submission

If no errors are detected, an alert will pop up on submission confirming that permission for the fund change has been received. Click “OK” to submit.

ucsdhealth.service-now.com says

By clicking "OK", you're confirming you have received appropriate departmental approval(s) for this Fund Change. If you have not yet received departmental approval, please click "Cancel".

Click 'OK' to submit form