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.

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

Choose a Fiscal Year

Select desired Fiscal Year

Search for desired 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.

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
   b. Search and select desired chart string to add then click “Add Chart String”
4) If needed, delete any chart strings that were not pre-populated by clicking the “Delete” button in the last column of the table.
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.
Examples of Valid vs. Invalid Changes

<table>
<thead>
<tr>
<th>MAY</th>
<th>JUN</th>
<th>MAY</th>
<th>JUN</th>
</tr>
</thead>
<tbody>
<tr>
<td>75</td>
<td>75</td>
<td>75</td>
<td>(+25)</td>
</tr>
<tr>
<td>25</td>
<td>25</td>
<td>25</td>
<td>25</td>
</tr>
</tbody>
</table>

Differences in totals will turn cells red

100  75  125
100  100 100
0    25  0   -25

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.

Invalid Submissions

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

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.