

Financial: Position Funding

Purpose

Create or updates to position funding

Decision Points

1. UCB Initiator
2. UCB Approver(s)

Templates

- Funding Entry
- Salary Cap/MCOP Worksheet

Data needed for transaction

	Funding Entry	Salary Cap/ MCOP Worksheet
With Validation	<ul style="list-style-type: none"> • Funding Effective Date • Ern code • Chart fields: <ul style="list-style-type: none"> ▪ Account ▪ Dept ID ▪ Fund ▪ Program ▪ Chartfield1 (optional) ▪ Chartfield2 (optional) ▪ Project (optional) ▪ PC Business unit (optional) ▪ PC Activity (optional) • Funding End Date (optional) • Pay Distribution % 	<ul style="list-style-type: none"> • Begin & End Dates • Ern code • Chart fields: <ul style="list-style-type: none"> ▪ Account ▪ Dept ID ▪ Fund ▪ Program ▪ Chartfield1 (optional) ▪ Chartfield2 (optional) ▪ Project (optional) ▪ PC Business unit (optional) ▪ PC activity (optional) • One of these required: <ul style="list-style-type: none"> ▪ Total Allocated Amt ▪ Percent of Pay ▪ Percent of Effort • Cap Rate Annual (optional)
Freeform Entry (no validation)	<ul style="list-style-type: none"> • Initiator Comments 	

For the Funding Entry template, approvers cannot edit any of the fields completed by the initiator.

Have a question about UCPATH? Email us at ucpathberkeleyinfo@lists.berkeley.edu

Guiding Principles

Sponsor Alignment

- Develop efficiency in end-to-end business process
- Use UCPath delivered functionality
- Minimize additional cost
- Eliminate double data entry

Diverse Campus Stakeholders

- Involve both academics and staff (at multiple levels)
- Maintain a customer focus

Disciplined Process

- Ensure implementation focus
- Use UCPath delivered templates and approval workflow
- Document decisions for clarity and commitment

Openness to Change

- Maintain enterprise-wide perspective
- Be open to process and role changes
- Be transparent with communications