Log in to [http://hraction.osu.edu](http://hraction.osu.edu)

Click on New to create a New request

Enter Supervisor’s ID Number, or use the Lookup option to locate using name.

Verify Department number corresponds with the desired OAA unit to ensure correct approver workflow.

Choose the Action type **Change Funding Source**.

This HR Action type is used for:
**Current/Future Funding Source Changes & Retroactive Funding Source Changes**,

If a more significant change is driving the funding change, such as a promotion, reclassification, transfer, etc., please use the best available HR Action request type and include the new funding information in the space provided.
HR Action Request – Change Funding Source

To process multiple changes, check this box and attach a list of employees with new desired funding sources.

Select current/future distributions to request future-dated changes and current pay period changes if payroll has not yet processed. See payroll processing calendar for assistance.

If an employee has multiple active positions, select the desired job record that requires a change in funding.

The system will present the existing funding source(s) based on the employee ID number and job record selected. Click the check box next to the chartfield(s) you would like to change.

Enter new funding chartfield(s) and confirm combined percentages equal 100%.

To add more chartfield rows, please click “+”.

---

<table>
<thead>
<tr>
<th>Job Title</th>
<th>Supervisor</th>
<th>Dept</th>
<th>Dept Name</th>
<th>Work Location</th>
<th>Hours Per Week</th>
</tr>
</thead>
<tbody>
<tr>
<td>NSF Graduate Research Fellow</td>
<td>Eckstrand Katherine L</td>
<td>30000</td>
<td>Graduate School Administration</td>
<td>University Hall</td>
<td>0.1</td>
</tr>
<tr>
<td>Graduate Supplemental Fellow</td>
<td>Eckstrand Katherine L</td>
<td>30000</td>
<td>Graduate School Administration</td>
<td>University Hall</td>
<td>0.1</td>
</tr>
</tbody>
</table>
HR Action Request – Change Funding Source

Change Funding Source Detail - Please supply as much information as possible

Is this request for multiple employees? [ ]
To process multiple changes, check this box and attach completed Direct Retro Distribution calculator

Enter Employee ID or use Lookup to search by name

Employee / OSU ID
Name (Last, First)

Choose the type of funding change:
Retroactive Distributions

Select retroactive distribution to process changes for salary expenses that have already been paid/processed

Enter the begin and end dates for the posted wages that need to be transferred to a new funding source.

Please note – biweekly pay period effective dates will not align with the monthly GL report dates. Please review pay period calendar for assistance.

Please select a job from the list below

<table>
<thead>
<tr>
<th>Record Number</th>
<th>Job Title</th>
<th>Supervisor</th>
<th>Dept</th>
<th>Dept Name</th>
<th>Work Location</th>
<th>Hours Per Week</th>
<th>Select</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>NSF Graduate Research Fellow</td>
<td>Ekström Katherine L.</td>
<td>30000</td>
<td>Graduate School Administration</td>
<td>University Hall</td>
<td>0.1</td>
<td></td>
</tr>
<tr>
<td>1</td>
<td>Graduate Supplennial Fellow</td>
<td>Ekström Katherine L.</td>
<td>30000</td>
<td>Graduate School Administration</td>
<td>University Hall</td>
<td>0.1</td>
<td></td>
</tr>
</tbody>
</table>

The system will present the existing funding source(s) for each pay period contained within the date range for the employee selected. Please review to identify the necessary changes.

If an employee has multiple active positions, select the desired job record that requires a change in funding.
HR Action Request – Change Funding Source

**Proposed Funding Source**

**Move Expense From** (only rows being changed need to be entered)

Enter Chartfield by: [Amount]

<table>
<thead>
<tr>
<th>Org</th>
<th>Fund</th>
<th>Account</th>
<th>Project</th>
<th>Program</th>
<th>User Defined</th>
<th>Amount</th>
<th>Release Time</th>
<th>Split Funding</th>
</tr>
</thead>
<tbody>
<tr>
<td>42015</td>
<td>011000</td>
<td>60044</td>
<td>Lookup</td>
<td>Lookup</td>
<td>Lookup</td>
<td>1500</td>
<td>[ ]</td>
<td>[ ]</td>
</tr>
</tbody>
</table>

**Move Expense To** (only rows being changed need to be entered)

<table>
<thead>
<tr>
<th>Org</th>
<th>Fund</th>
<th>Account</th>
<th>Project</th>
<th>Program</th>
<th>User Defined</th>
<th>Amount</th>
<th>Release Time</th>
<th>Split Funding</th>
</tr>
</thead>
<tbody>
<tr>
<td>42015</td>
<td>011000</td>
<td>60044</td>
<td>19763</td>
<td>OAA</td>
<td>Lookup</td>
<td>1500</td>
<td>[ ]</td>
<td>[ ]</td>
</tr>
</tbody>
</table>

The ‘from’ chartfield(s) should match the returned funding source(s) that were charged for the original salary expense within the selected date range.

The ‘to’ chartfield(s) should reflect the funding source(s) that will incur the salary expense.

To add more chartfield rows. Please click “+”

**Retroactive Distributions**

Please make sure the Amount fields are completed in both the ‘from’ and ‘to’ sections, and the total amounts match.

**Information in this request is viewable and subject to disclosure under the Ohio public records statute and rules of discovery.**

**Additional Information (Business Purpose/Reason, etc.)**

[2000 characters remaining]

**Attachments**

Attach DRD calculator for multiple employee retro funding changes or spreadsheet containing current/future changes.

For single employee changes, attachments are optional and may include any supporting documentation to be linked for audit review or department record retention needs.

Provide any additional comments to assist in entry and/or explanation of funding changes, if applicable.
**HR Action Request – Change Funding Source**

Questions will automatically populate for retro changes involving the Office of Sponsored Programs (OSP) funding. These questions will be required to process the transaction.

For requests involving funding changes over 90 days ago, please be sure to provide a justification in order for OSP to approve the request.
Save, Review and Submit!

If you are not ready to submit, you may come back to the HRA later by clicking Save For Later.

Once you are ready to submit the HRA, please click Save and Continue and then Submit.

Note: Change Funding Source requests do not go through approval workflow and cannot include ad hoc approvals. If a change needs to be made after the request is submitted, please contact the HR Service Center.