Funding

Roles: Financial Manager, Financial Manager Assistant

Project Status: Planning, Bid & Award, Construction

Step	***Task***
1.	Click the drop-down next to *Go To…* and select **Project Data Summary.**
2.	Scroll to the bottom of the page and click the **Edit Funding** command button.
3.	In the *Funding Accounts* section, click the **Add Account** command button.
4.	In the *Account* text box, enter the Funding Account. If the account is unknown, enter a description (e.g., Chancellor, Institutional Support). When the funding has been confirmed, the Account field can be revised.
5.	In the *Charge Account* field, click the drop-down and select a previously **added Charge Account** or relate the Charge Account to the Fund at a later date when Charge Account information has been added.
6.	In the *Amount* text box, type in the amount (estimated or confirmed).
7.	In the *Fund Source Type* field, click the drop-down and select the appropriate **type**.
8.	If the Fund Source Type has a sub-type, the form will refresh to display the drop-down menu for the sub-type; select the appropriate **sub-type.**
9.	In the *Confirmed* field, if the funding amount has been confirmed, click the drop-down and select the **Yes.** • Prior to Project Approval, the Planner/Project Manager can work with the budget regardless of whether fund sources have been entered or confirmed. • After Project Approval, the Planner/Project Manager will be unable to create a budget that exceeds total amount of funding entered.
10.	In the *Promise Date* field, enter the date the promise of funding was received.
11.	In the *Received Amount* field, enter the amount of funding received.
12.	In the *Description* field, enter relevant information about this fund source.
13.	Click the **Submit** command button.