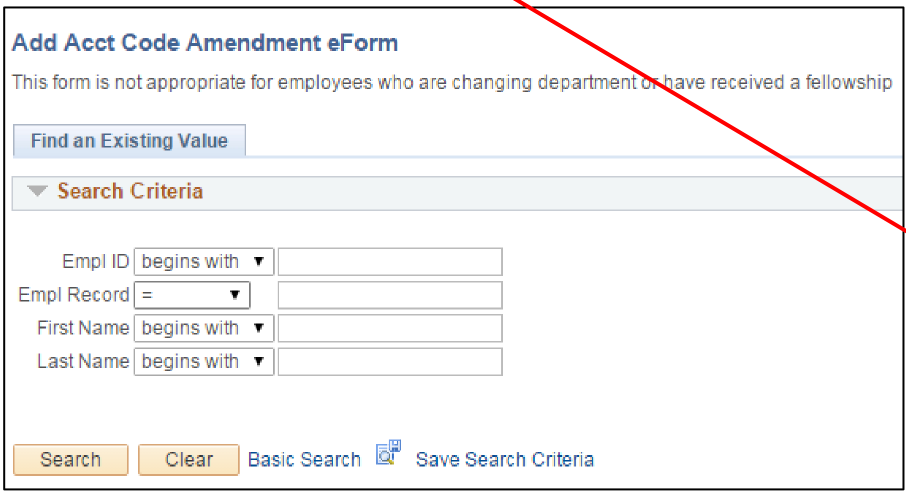
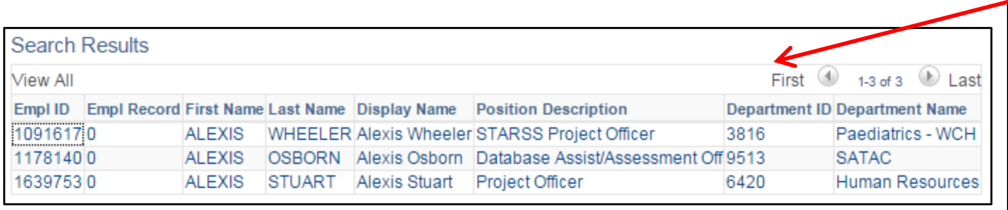
Initiating an Account Code Amendment Form

Navigation: **PeopleSoft > Main Menu > HR eForms > HR eForms Homepage > Create a HR eForm**





Empl ID	Empl Record	First Name	Last Name	Display Name	Position Description	Department ID	Department Name
1091617	0	ALEXIS	WHEELER	Alexis Wheeler	STARSS Project Officer	3816	Paediatrics - WCH
1178140	0	ALEXIS	OSBORN	Alexis Osborn	Database Assist/Assessment Off	9513	SATAC
1639753	0	ALEXIS	STUART	Alexis Stuart	Project Officer	6420	Human Resources

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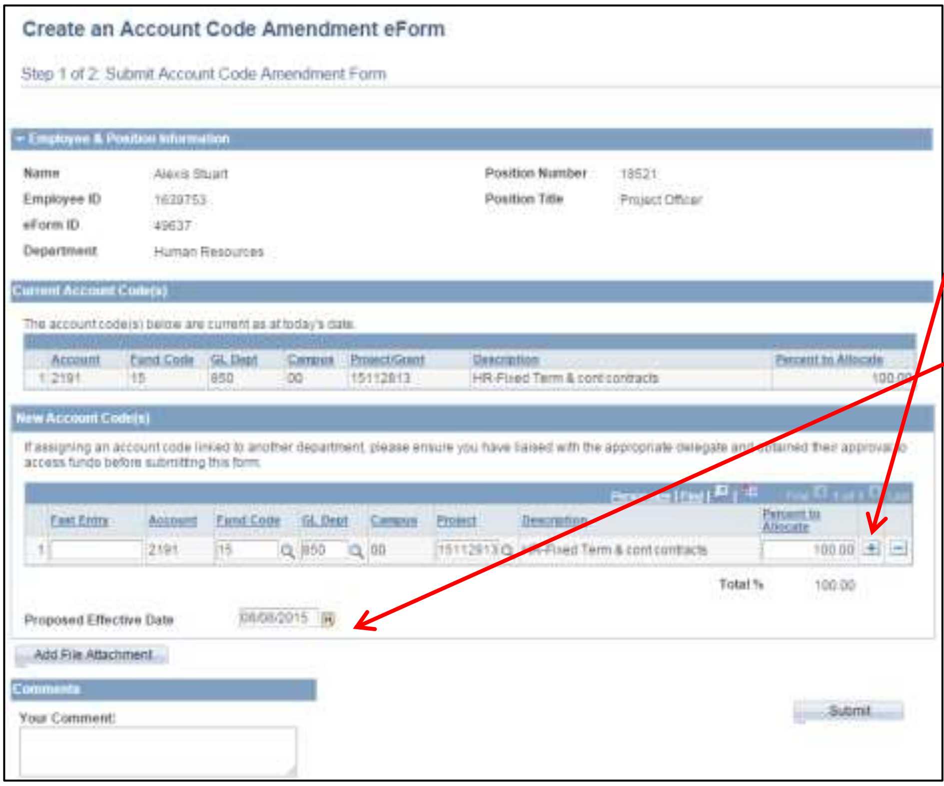
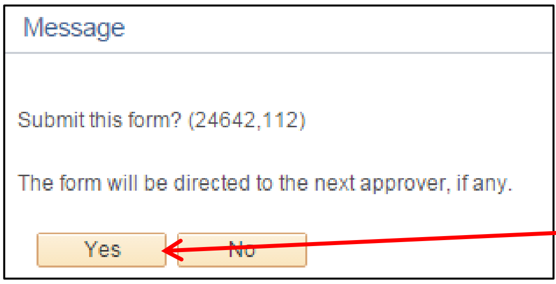
A form can be initiated by an active fixed term or continuing employee for themselves or another employee within their area. Alternatively it can be initiated by the School Budget user list member within your area who is also the approver for any account code changes.

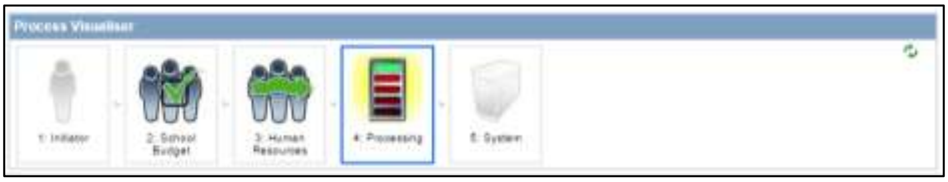
Note: This form is not appropriate for employees who are changing departments, who have received a fellowship, casuals or scholarship holders.

1. Navigate to **Create a HR eForm** in PeopleSoft from Unified.
2. Select **Account Code Amendment Form**
3. Search for the employee you want to initiate the form for using either **Empl ID**, **First Name** or **Last Name**.
4. If there are multiple employees who meet your search criteria, select the desired employee from the **Search Results**. If multiple search results do not exist, the form will be displayed.
5. The form will pre-populate with the account code details as of the date logged in. To change the account code, navigate to the **New Account Code(s)** section. The only fields which can be changed through this form are:
   - Fund Code
   - GL Dept
   - Project

   If the account code or campus are required to be changed, please contact the HR Service Centre and they will direct to the correct process for this to occur.







6. Go the Account Code table and complete all fields as required or enter the full account code (including non-changeable fields) in the **Fast Entry** field.
7. To add a new row for multiple funding sources click on the **Plus** icon.
   Note: A maximum of 5 account code splits is allowed.
8. The **Proposed Effective Date** will pre-populate with the start of the current pay period. The effective date cannot be prior to this date. To update the proposed effective date, click on the **Calendar** icon next to the field and select the required date. The effective date may be required to be updated when processed depending on when the form is submitted. You will be notified of this via email once the form has been processed.
9. To attach a file, please refer to the [Attaching a File Quick Reference Guide]
10. Comments can be added in the **Your Comment** box if required.
11. Click **Submit**
12. Answer **Yes** to the form message.
13. The **Visualiser** will be displayed. The visualiser will show you what steps have been undertaken and where the task is currently sitting. A form will workflow to HR, if the following conditions are met:
    1. The employee's classification is a Category 2 – Research Only; and
    2. Position is predominately funded by the ARC and changing to something else; or
    3. Position is predominately funded by the NHMRC and changing to something else; or
    4. Currently not funded by either ARC or NHMRC and changing to ARC or NHMRC.
14. To check the status of any forms submitted, refer to the (insert hyperlink for updated QRG)

Further Information

If you require further information please contact the HR Service Centre at 8313 1111, complete the online enquiry form or view CRAFT FAQs.