Change Existing Accounts

University of Hawai‘i
Office of Research Services
What you will learn

• Why using search is the best way to start a create change action
• How to enter changes into the system
NOTE

- To add a cost sharing account to an existing FMIS account, you must use the Create/Change FMIS Accounts radio button.
- On the Change Existing Account Attributes screen there is a create cost sharing document link.
- Data is entered and submitted like a new cost sharing form.
Go to http://www.rcuh.com
Click on UH-FMIS Fast Track
Enter User Name & Password
Select Change Cost-Sharing
Select Search Cost Sharing
Use search to start

- Using the search function is the easiest way to begin a create change action
- If you use “Change Existing Cost-Sharing Record…” you will need to go through pages of accounts to find the one you want to change
Example

• Assume you want to make a change to account F02210F652B497
Enter search word
Click on create change
Change cost sharing screen

University of Hawaii
Change Cost Sharing Record Form

<table>
<thead>
<tr>
<th>Status</th>
<th>Pending FO Submittal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Control #:</td>
<td>1000261</td>
</tr>
<tr>
<td>Account No:</td>
<td>F02210F652B497</td>
</tr>
<tr>
<td>FO Code:</td>
<td>083</td>
</tr>
<tr>
<td>Award #:</td>
<td>OCE99-05463RREADI</td>
</tr>
<tr>
<td>Period:</td>
<td>09/01/99 - 08/31/02</td>
</tr>
<tr>
<td>PI Name:</td>
<td>RUBIN, KENNETH(3616)</td>
</tr>
<tr>
<td>Project Title</td>
<td>OCE99-05463 RREADI-2</td>
</tr>
</tbody>
</table>

Instructions:
- Please use digits 0-9 only for whole dollar amounts. Do not use alpha characters, $, commas, or periods.
- Also, grey box with line number is a button that can be used to duplicate Committed Account, Percent Partic., and Committed Period from previous line.

Print:
- Use the Print Mode button below and Page Setup... to change the orientation from portrait to landscape.

Display original master file in new window (close the new window when you are done or navigate between them by using Alt+Tab).
Note control number
Note partially filled in form

### Personal Service Contribution:

<table>
<thead>
<tr>
<th>Name (Last, First, Mid. Initial)</th>
<th>SSN</th>
<th>Committed Account</th>
<th>% Part.</th>
<th>Committed Period</th>
<th>Fiscal Yr Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>FD</td>
<td>YR</td>
<td>APFN</td>
<td>DMAJ</td>
</tr>
<tr>
<td>1.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>8.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>9.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*go to lines 9-30*

*go to lines 31-48*

*(click the above only if applicable)*

(Cost Contributions other than Salaries (use only if specified in agreement))
To change line select C

```latex
\begin{tabular}{|c|c|c|c|c|c|c|c|c|}
\hline
Name (Last, First, Mid. Initial) & SSN & Committed Account & % Part. & Committed Period & Fiscal Yr. Amount \\
\hline
FD & YR & APPN & D & MAJ & CA & MIN & From/To & (mm/dd/yy) \\
\hline
1 & G & 02 & 028 & F & 125 & B & 372 & 00.00 & 09/01/99 & 08/31/00 \\
2 & G & n? & n?28 & F & 125 & R & 372 & n.08 & 09/01/00 & 08/31/01 \\
\hline
\end{tabular}
```

- go to lines 9-20
- go to lines 31-45
- go to lines 46-60

(click the above only if applicable)
Overwrite data here
Overwriting data

• Name, SSN, committed account, percent participation, and committed period may be overwritten

• For example, if the account is supposed to reflect an 024 appropriation, simply erase ‘028’ and enter ‘024’

• Changes will appear in red
Change line 1 appropriation
Make incremental changes here
Incremental changes

• The fiscal year and budget year columns do not use the overwrite function
• If you wish to increase the fiscal year amount from 1,000 to 2,000 you cannot enter 2000 in the fiscal year column
• You must enter 1000
Do not enter 2000
Enter 1000

![Service Contribution Table]

<table>
<thead>
<tr>
<th>First, Mid. Initial</th>
<th>SSN</th>
<th>Committed Account</th>
<th>% Par.</th>
<th>Committed Period</th>
<th>Fiscal Yr Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>1000</td>
</tr>
</tbody>
</table>

*Note: Click the above only if applicable.*

*Contributions other than Salaries (use only if specified in agreement)*
Automatic addition

- Because amounts entered in the fiscal year column are automatically added to the budget year column by the program, do not enter 1000 in the budget year column or your cumulative total will be overstated by 1,000
Do not enter 1000 in budget year
Don’t forget fringe benefits

• When adjusting salary costs, don’t forget to make a commensurate increase or decrease in the fringe benefits
• Do not use A for adding to fringe benefits
• Use C to make a change to the fiscal year total
Fringe benefit changes (22%)
To delete a line simply choose D
You can also add new lines
Back to the fringe

- Note that there is only one fringe benefit line
- The net change to fringe benefits must be recorded on that line
- Thus, if you go more than eight lines, don’t forget to consider the other pages in computing the fringe amount
Type B uses same entry methods

<table>
<thead>
<tr>
<th>Desc. (Committed Acct. not required for Ext. Support or Indirect Costs)</th>
<th>Committed Account</th>
<th>Committed Amount</th>
<th>Committed Period From/To (mm/dd/yy)</th>
<th>Fiscal Yr Amount</th>
<th>Budget Yr Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fringe Benefits</td>
<td></td>
<td></td>
<td></td>
<td>220</td>
<td></td>
</tr>
</tbody>
</table>
Add, Change or Delete here

<table>
<thead>
<tr>
<th>Desc. (Committed Acct., not required for Ext. Support or Indirect Costs)</th>
<th>Committed Account</th>
<th>Committed Amount</th>
<th>Committed Period From/To (mm/dd/yy)</th>
<th>Fiscal Yr Amount</th>
<th>Budget Yr Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fringe Benefits</td>
<td></td>
<td></td>
<td></td>
<td>220</td>
<td></td>
</tr>
</tbody>
</table>

*go to lines 8-15 (click the above only if applicable)*

Internal Comments:
Overwrite here

| Cost Contributions other than Salaries (use only if specified in agreement) |
|---|---|---|---|---|---|
| Desc. | Committed Account | Committed Amount | Committed Period | Fiscal Yr Amount | Budget Yr Amount |
| Fringe Benefits | F YR APPN D MAJ CA MIN | | | 220 | |

*go to lines 8-15 (click the above only if applicable)*
Incremental changes here

<table>
<thead>
<tr>
<th>Description</th>
<th>Commitment Account</th>
<th>Committed Amount</th>
<th>Commitment Period From/To (mm/dd/yyyy)</th>
<th>Fiscal Year Amount</th>
<th>Budget Year Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fringe Benefits</td>
<td>F</td>
<td></td>
<td></td>
<td>220</td>
<td></td>
</tr>
</tbody>
</table>

(Click the above only if applicable)

Internal Comments:
Fiscal year and budget year

- Because the fiscal year and budget year concepts are difficult to grasp at first, please refer to the handbook for a more detailed explanation
Select clerk and submit request