



Administration

Funds Change Request

Interscope + Training



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State Construction Office
Department of Administration

Funds Change Request

Funds change requests allow moving funds from an Authorization/Program to another Authorization/Program. It begins with entering a request, and continues with a sequential multi-step approval process.

A separate request must be created for each source of funds to be transferred.

The Program that the funds will be transferred from must have unassigned funds equal to or greater than the amount to be transferred within the source of funds to be transferred, i.e. the program must have \$15,000 unassigned Non-General Fund (NGF) funds in order to be able to transfer \$15,000 NGF. Excess funds in projects may be unassigned to increase the amount of unassigned funds available within a program.



Funds Change Request

At the top of your home page, select Funds Change Request>Funds Change Request to bring up the Funds Transfer Search Screen.

Home System Users Companies New FCAP Design Review Authorizations Programs Funds Change Request My Account My Company My Company Reports Data Forms Help

Fire Prot. Reviews My Packages Approved For Bid Evaluations (Active) Funds Change Request Search

System Notices My Favorites Active Design Contracts Active Construction Contracts All Change Orders In Process My Change Orders In Process My Projects My Plan Reviews In Process Clipboard ARCH Reviews CODE Reviews CIVIL Reviews MECH Reviews ELEC Reviews

DUE	RECEIVED	SCO ID#	NOTE	AGENCY	PROJECT TITLE	REVIEW TYPE	PHASE SUB#	HOURS
-----	----------	---------	------	--------	---------------	-------------	------------	-------

0 found

10/14/2016 1:24:35 PM InterscopePlus 2.2_20161012 Copyright© 2016 - State of North Carolina : Department of Administration : State Construction Office Report a Problem



Funds Change Request

On the search screen, you can search for a previous request that has been made to check the status or create a new request. A new request may be either a transfer of existing funds from one program to another or an increase/decrease in authority.

InterSCOPE :: State Of North Carolina - State Construction Office USER: lhahnel VIEW: State Construction Logout

Funds Transfers Search: Enter criteria and press search

Department: = ▼ --- Select Department --- ▼

Institution/Agency: = ▼ --- Select Agency --- ▼

Fiscal Year: = ▼ --- Select Fiscal Year --- ▼

Change Amount: > ▼

Request Type: = ▼ --- Select Transfer Type --- ▼

Request#: = ▼

Request Status: = ▼ --- Select Status --- ▼

Request Date: > ▼ / /

Budget Code: Like ▼

Budget Item: Like ▼

NCAS Center: Like ▼

Search Done Reset **New Funds Transfer** **New Increase/Decrease**

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Increase/decrease in authority applies generally to Non-General Fund or Non-State Debt funding sources where the agency/institution is providing the funds, or releasing unneeded funds. Both follow a similar approval process.



Funds Transfer



Funds Change Request

Funds Transfer

Select the New Funds Transfer button.

InterSCOPE :: State Of North Carolina - State Construction Office USER: lhahnel VIEW: State Construction Logout

Funds Transfers Search: Enter criteria and press search

Department: = ▾ --- Select Department --- ▾	Request Status: = ▾ --- Select Status --- ▾
Institution/Agency: = ▾ --- Select Agency --- ▾	Request Date: > ▾ / /
Fiscal Year: = ▾ --- Select Fiscal Year --- ▾	Budget Code: Like ▾ <input type="text"/>
Change Amount: > ▾ <input type="text"/>	Budget Item: Like ▾ <input type="text"/>
Request Type: = ▾ --- Select Transfer Type --- ▾	NCAS Center: Like ▾ <input type="text"/>
Request#: = ▾ <input type="text"/>	

Search Done Reset **New Funds Transfer** New Increase/Decrease

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Funds Change Request

Funds Transfer

Search for the Program that you want to transfer the funds from and select the desired program.

Funds Transfer

Action Close

Transfer From:

Agency:

Program: Search

Source Of Funds | Code Item Center | Original Code Item | Allocated Amount | Assigned To Projects | Pending Changes | Available To Assign | Transfer Amount

Total Amount to Transfer:

Transfer To:

Agency:

Program: Search

Authorization:

Remarks:

Save and Continue

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Funds Change Request

Funds Transfer

Enter search criteria. Search for the Program that you want to transfer the funds from and select the desired program.

Funds Transfer Action Close

Transfer From:
Agency:
Program:

Total Amount to Transfer:

Transfer To:

Select Program...

Department:	=	▼	Administration	▼	Alternate Name:	Like	▼	<input type="text"/>
Institution/Agency:	=	▼	State Construction Office	▼	Budget Code:	Like	▼	<input type="text"/>
Fiscal Year:	=	▼	2016 - 2017	▼	Budget Item:	Like	▼	<input type="text"/>
Program ID:	Like	▼	<input type="text"/>		NCAS Center:	Like	▼	<input type="text"/>
Program Name:	Like	▼	<input type="text"/>		Status:	=	▼	Active
Available to Transfer:	=	▼	<input type="text"/>					

SL No.	Institution / Agency	Program ID	Program Name	Alternate Name	Status	Funded By C-I-C	Authorized Amount	Assigned To Projects	Avail to Assign
1	SELECT State Construction Office	12455	Veterans Affairs Nursing Homes -	State Veterans Home - Security	ACTIVE	Multiple	\$610,000.00	\$610,000.00	\$0.00
2	SELECT State Construction Office	13656	State Capitol Sidewalk & Electrical		ACTIVE	41501-4V26	\$562,000.00	\$0.00	\$562,000.00
3	SELECT State Construction Office	13657	State Records Center - Elevator		ACTIVE	41501-4V28	\$317,000.00	\$317,000.00	\$0.00

1 page(s) [1]

3 found

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Funds Change Request

Funds Transfer

Enter the amount you wish to transfer. If there are multiple fund sources in the program, be sure to select the desired fund source.

Funds Transfer Action Close

Transfer From:
Agency: State Construction Office
Program: Veterans Affairs Nursing Homes - Security Improvements (12455)

Source Of Funds	Code Item Center	Original Code Item	Allocated Amount	Assigned To Projects	Pending Changes	Available To Assign	Transfer Amount
NGF	40601-4G31	40601-4G31	\$305,000.00	\$305,000.00	\$0.00	\$0.00	\$0.00
NGF	40601-4G32	40601-4G32	\$305,000.00	\$305,000.00	\$0.00	\$0.00	\$0.00

Total Amount to Transfer:

Transfer To:
Agency:
Program:
Authorization:
Remarks:

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Funds Change Request

Funds Transfer

Then, search for and select the Program to which you will transfer the funds.

Funds Transfer Action Close

Transfer From:
Agency: State Construction Office
Program: Veterans Affairs Nursing Homes - Security Improvements (12455)

Source Of Funds	Code Item Center	Original Code Item	Allocated Amount	Assigned To Projects	Pending Changes	Available To Assign	Transfer Amount
NGF	40601-4G31	40601-4G31	\$305,000.00	\$305,000.00	\$0.00	\$0.00	\$0.00
NGF	40601-4G32	40601-4G32	\$305,000.00	\$305,000.00	\$0.00	\$0.00	\$0.00

Total Amount to Transfer:

Transfer To:
Agency:
Program:

Select Program...

Department: =	Administration	Alternate Name: Like	
Institution/Agency: =	State Construction Office	Budget Code: Like	
Fiscal Year: =	--- Select Fiscal Year ---	Budget Item: Like	
Program ID: Like		NCAS Center: Like	
Program Name: Like		Status: =	--- Select Status ---
Available to Transfer: =			

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Funds Change Request

Funds Transfer

Enter appropriate remarks as to why you are transferring the funds. Click the “Save and Continue” button.

Funds Transfer

Action Close

Transfer From:

Agency: State Construction Office

Program: State Capitol Sidewalk & Electrical (13656) Search

Source Of Funds	Code Item Center	Original Code Item	Allocated Amount	Assigned To Projects	Pending Changes	Available To Assign	Transfer Amount
RRGF	41501-4V26	41501-4V26	\$562,000.00	\$0.00	\$0.00	\$562,000.00	1

Total Amount to Transfer: \$1.00

Transfer To:

Agency: State Construction Office

Program: State Capitol Sidewalk & Electrical (13656) Search

Authorization: 2016 - 41501--4V26-State Capitol Sidewalk Repairs & Site

Remarks:

Save and Continue

Save and Continue

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Funds Change Request

Funds Transfer

This brings up the summary of the request and you will see the workflow button on the ribbon.

Funds Transfer Summary

[Workflow](#) [Action](#) [Close](#)

Institution / Agency: State Construction Office
Amount: \$1.00
Request Status: Created
Effect on Source Authorization: [41501-4V26 State Capitol Sidewalk Repairs & Site Electrical](#)
Authorized Funds

	Before	Pending Transfers	This Request	After
Total Authorized	\$562,000.00	\$0.00	(\$1.00)	\$561,999.00
Avail to Assign	\$562,000.00	\$0.00	(\$1.00)	\$561,999.00

Transaction: Transfer Funds
Remarks:
Effect on Destination Authorization: [41501-4V26 State Capitol Sidewalk Repairs & Site Electrical](#)
Authorized Funds

	Before	Pending Transfers	This Request	After
Total Authorized	\$562,000.00	\$0.00	\$1.00	\$562,001.00
Avail to Assign	\$562,000.00	\$0.00	\$1.00	\$562,001.00

Effect on Source Program: 13656 - State Capitol Sidewalk & Electrical
Funds Allocated to Program

Original C-I-C	Source	Allocated Before	Pending Changes	This Request	Allocated After
41501-4V26	RRGF	\$562,000.00	\$0.00	(\$1.00)	\$561,999.00

Effect on Destination Program: 1831 - Capitol Square Sidewalk Repairs
Funds Allocated To Program

Original C-I-C	Source	Allocated Before	Pending Changes	This Request	Allocated After
41501-4V26	RRGF	\$0.00	\$0.00	\$1.00	\$1.00

Workflow

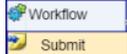
STEP	ACTION	ACTIVE?	ROLE	ORGANIZATION	APPROVER	Completed On	Alerted On	DISPOSITION	COMMENTS
1	CREATE	N	AGENCY	State Construction Office	lhahnel	10/14/2016 14:26		Created	
2	SUBMIT	Y	AGENCY	State Construction Office					
3	APPROVE	N	AGENCY	State Construction Office					
4	APPROVE	N	DEPARTMENT	Administration					
5	APPROVE	N	OSBM	State Budget And Management					

Comments

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Funds Change Request

Funds Transfer

Select  to send the request forward for approval.

Funds Transfer Summary

Institution / Agency: State Construction Office
Amount: \$1.00
Request Status: Created
Effect on Source Authorization: [41501-4V26 State Capitol Sidewalk Repairs & Site Electrical](#)
Authorized Funds

	Before	Pending Transfers	This Request	After
Total Authorized	\$562,000.00	\$0.00	(\$1.00)	\$561,999.00
Avail to Assign	\$562,000.00	\$0.00	(\$1.00)	\$561,999.00

Effect on Source Program: 13656 - State Capitol Sidewalk & Electrical
Funds Allocated to Program

Original C-I-C	Source	Allocated Before	Pending Changes	This Request	Allocated After
41501-4V26	RRGF	\$562,000.00	\$0.00	(\$1.00)	\$561,999.00

Transaction: Transfer Funds
Remarks: Test for Training purposes
Effect on Destination Authorization: [41501-4V26 State Capitol Sidewalk Repairs & Site Electrical](#)
Authorized Funds

	Before	Pending Transfers	This Request	After
Total Authorized	\$562,000.00	\$0.00	\$1.00	\$562,001.00
Avail to Assign	\$562,000.00	\$0.00	\$1.00	\$562,001.00

Effect on Destination Program: 1831 - Capitol Square Sidewalk Repairs
Funds Allocated To Program

Original C-I-C	Source	Allocated Before	Pending Changes	This Request	Allocated After
41501-4V26	RRGF	\$0.00	\$0.00	\$1.00	\$1.00

Workflow

STEP	ACTION	ACTIVE?	ROLE	ORGANIZATION	APPROVER	Completed On	Alerted On	DISPOSITION	COMMENTS
1	CREATE	N	AGENCY	State Construction Office	lhahnel	10/14/2016 14:26		Created	
2	SUBMIT	Y	AGENCY	State Construction Office					
3	APPROVE	N	AGENCY	State Construction Office					
4	APPROVE	N	DEPARTMENT	Administration					
5	APPROVE	N	OSBM	State Budget And Management					

Comments

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Normally, the requester will not be approving the request for the Agency/Institution, but an email will be sent to the Approver, notifying him/her that there is a request for his/her action.



Funds Change Request

Funds Transfer

The person who is the next level up in the approval process will open the transaction and make a decision to accept or reject the request, by selecting the appropriate button under Workflow. They may make comments in the space provided at the bottom of the workflow, and an explanation in the comments is mandatory if they Reject the request. If that person disapproves the request, the original requester is notified and the process is complete. If that person approves the request, the system notifies the next higher level approver. The 3rd level person must log in and navigate to the pending request.

- YOU ARE NOT AUTHORIZED TO SUBMIT

Funds Transfer
Funds Transfer Summary

Workflow
Action
Close

Institution / Agency: State Construction Office

Amount: \$1.00

Request Status: Created

Effect on Source Authorization: [41501-4V26 State Capitol Sidewalk Repairs & Site Electrical](#)

Authorized Funds

	Before	Pending Transfers	This Request	After
Total Authorized	\$562,000.00	\$0.00	(\$1.00)	\$561,999.00
Avail to Assign	\$562,000.00	\$0.00	(\$1.00)	\$561,999.00

Effect on Source Program: 13656 - State Capitol Sidewalk & Electrical

Funds Allocated to Program

Original C-I-C	Source	Allocated Before	Pending Changes	This Request	Allocated After
41501-4V26	RRGF	\$562,000.00	\$0.00	(\$1.00)	\$561,999.00

Transaction: Transfer Funds

Remarks: Test for Training purposes

Effect on Destination Authorization: [41501-4V26 State Capitol Sidewalk Repairs & Site Electrical](#)

Authorized Funds

	Before	Pending Transfers	This Request	After
Total Authorized	\$562,000.00	\$0.00	\$1.00	\$562,001.00
Avail to Assign	\$562,000.00	\$0.00	\$1.00	\$562,001.00

Effect on Destination Program: 1831 - Capitol Square Sidewalk Repairs

Funds Allocated To Program

Original C-I-C	Source	Allocated Before	Pending Changes	This Request	Allocated After
41501-4V26	RRGF	\$0.00	\$0.00	\$1.00	\$1.00

Workflow

STEP	ACTION	ACTIVE?	ROLE	ORGANIZATION	APPROVER	Completed On	Alerted On	DISPOSITION	COMMENTS
1	CREATE	N	AGENCY	State Construction Office	lhahnel	10/14/2016 14:26		Created	
2	SUBMIT	Y	AGENCY	State Construction Office					
3	APPROVE	N	AGENCY	State Construction Office					
4	APPROVE	N	DEPARTMENT	Administration					
5	APPROVE	N	OSBM	State Budget And Management					

Comments

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Funds Change Request

Funds Transfer

The status for the request remains in “Pending” until disapproved, or until the top level of the approval process approves it.

Funds Transfer Summary | **Funds Transfer** Close

Institution / Agency: UNC Pembroke
Amount: \$100,000.00
Effect on Source Authorization: [41631-302 Agricultural Center](#)
Authorized Funds

Transaction: Transfer Funds
Remarks: Shift utility work to this project.
Effect on Destination Authorization: [41531-301 Performing Arts Building](#)
Authorized Funds

Effect on Source Program: 9904 - Agricultural Center
Funds Allocated to Program

Effect on Destination Program: 9903 - Performing Arts School
Funds Allocated To Program

Workflow

STEP	ACTION	ACTIVE?	ROLE	ORGANIZATION	APPROVER	COMPLETED ON	ALERTED ON	DISPOSITION	COMMENTS
1	CREATE	N	AGENCY	UNC Pembroke		4/13/2015		Created	rcox
2	SUBMIT	N	AGENCY	UNC Pembroke		4/13/2015		Pending	rcox
3	APPROVE	N	AGENCY	UNC Pembroke		4/13/2015		Pending	rcox
4	APPROVE	N	DEPARTMENT	Educational Institutions (Universities)		4/13/2015		Pending	uncga
5	APPROVE	N	OSBM	State Budget And Management		4/13/2015		Approved	osbm

Comments

Once it receives final approval, the funds records will be updated and there will no longer be funds in a pending status. While funds are in a pending status, they may not be assigned, committed, or otherwise affected.



Increase/Decrease



Funds Change Request

Increase/Decrease

Select “Funds Change Request” from the ribbon and click “Funds Change Request Search”

The screenshot displays the InterscopePlus software interface. The top ribbon is highlighted, showing various navigation options: Home, System, Users, Companies, New, FCAP, Design Review, Authorizations, Programs, Funds Change Request, My Account, Reports, Forms, and Help. The 'Funds Change Request' ribbon is expanded, revealing a sub-ribbon with buttons for Fire Prot. Reviews, My Packages, Approved For Bid, New Projects, Evaluations (Active), and Funds Change Request Search. Below the ribbon, there are several tabs for different project stages: System Notices, My Favorites, Active Design Contracts, Active Construction Contracts, All Change Orders In Process, My Change Orders In Process, My Projects, My Plan Reviews In Process, Clipboard, ARCH Reviews, CODE Reviews, CIVIL Reviews, MECH Reviews, and ELEC Reviews. A table header is visible with columns for TYPE, PROJECT ID, AGENCY PROJECT CODE, and DESCRIPTION. Below the table, a blue bar indicates '0 found'. The footer contains the date '10/17/2016 8:21:51 AM', the version 'InterscopePlus 2.2_20161012 Copyright © 2016 - State of North Carolina : Department of Administration : State Construction Office', and a 'Report a Problem' button.

Funds Change Request

Increase/Decrease

Select the “New Increase/Decrease button

The screenshot shows the 'Funds Transfers Search' interface. At the top is a navigation menu with items: Home, System, Users, Companies, New, FCAP, Design Review, Authorizations, Programs, Funds Change Request, My Account, Reports, Forms, and Help. Below the menu is a search bar with the text 'Funds Transfers Search: Enter criteria and press search'. The search area contains two columns of filters. The left column includes: Department (dropdown), Institution/Agency (dropdown), Fiscal Year (dropdown), Change Amount (dropdown and text input), Request Type (dropdown), and Request# (dropdown and text input). The right column includes: Request Status (dropdown), Request Date (dropdown and date input), Budget Code (dropdown and text input), Budget Item (dropdown and text input), and NCAS Center (dropdown and text input). Below the filters is a row of buttons: Search, Done, Reset, New Funds Transfer, and New Increase/Decrease. The 'New Increase/Decrease' button is circled in red. At the bottom of the page, there is a footer with the text 'InterscopePlus Copyright © - State of North Carolina : Department of Administration : State Construction Office' and a 'Report a Problem' link.

NOTE: You may only increase or decrease existing authority.



Funds Change Request

Increase/Decrease

Search for the Existing Authorization you wish to increase or decrease.

Authorization Change

Action Close

Increase or Decrease Authority

Existing Authorization: **Search** Total Authorized:

Total Change in Authority:

Allocate To Program

Program:

Remarks:

Save and Continue

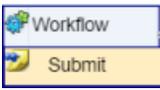
10/17/2016 8:27:39 AM InterscopePlus 2.2_20161012 Copyright © 2016 - State of North Carolina : Department of Administration : State Construction Office Report a Problem



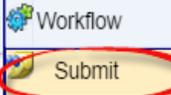
Funds Change Request

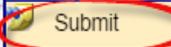
Increase/Decrease

This brings up the summary of the request. Select  and you will see the workflow with the current status.

Select  to send the request forward for approval.

Authorization Change

 Workflow  Action 

 Submit

Institution / Agency: UNC Pembroke
Amount: \$10,000.00
Effect on Authorization: [2017 - 41631-313 - Ag Center NGF](#)

Transaction: Increase/Decrease
Remarks: Supplement for increased cost
Effect on Program: [9904 - Agricultural Center](#)
Funds Allocated to Program

Authorized Funds

 **Workflow**

STEP	ACTION	ACTIVE?	ROLE	ORGANIZATION	APPROVER	COMPLETED ON	ALERTED ON	DISPOSITION	COMMENTS
1	CREATE	N	AGENCY	UNC Pembroke		4/13/2015		Created	rcox
2	SUBMIT	Y	AGENCY	UNC Pembroke					
3	APPROVE	N	AGENCY	UNC Pembroke					
4	APPROVE	N	DEPARTMENT	Educational Institutions (Universities)					
5	APPROVE	N	OSBM	State Budget And Management					

Comments

The workflow continues the same as a funds transfer request until it is approved or rejected.



For More Training Presentations

Please visit our website at <https://ncadmin.nc.gov/businesses/construction/interscope>
And search under “Training Materials”





Administration

Funds Change Request

Interscope + Training



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Department of Administration