

How to decide which forms to use?

Desired Outcome	Forms and Supplemental Materials	Guidelines	Facilitation
<ul style="list-style-type: none"> To correct incorrect description detail To add more clarification to an existing DeptID description 	<p>Form: Description Change Request Form (Form can be filled out prior to approval)</p> <p>Supplemental Materials: Excel version of the Division's Org Tree highlighting proposed change</p>	<ul style="list-style-type: none"> Description Changes for existing DeptIDs and Org Nodes are only allowed: <ul style="list-style-type: none"> To correct a typo, or To add more clarification to the existing description if <ul style="list-style-type: none"> The DeptID was incorrectly named in the first place, or Description change is related to a group or center name change Descriptions can only have 30 characters or fewer <ul style="list-style-type: none"> DeptID descriptions must include the Level 4 entity code Format: [Level 4 Entity Code] [Description] e.g. "BAHSB Gen Ops" Use of special characters #, /, ", "" and @ are discouraged as they can cause system issues 	<p><u>Questions to ask</u></p> <ol style="list-style-type: none"> Is your description change addressing confusion from the current DeptID Description (e.g. old name is an acronym and a new name would be clearer and more descriptive)? Will historical transactions fit the new description? Are you sure that you are not duplicating an existing DeptID description, information or activity? If so, consider combining DeptIDs into a new one. Have you considered the description change in relation to your overall organizational structure? Are activities moving in or out of the DeptID that are driving the description change? If so, will need to consider the amount of activity remaining from the original DeptID. If more than 50% is going away or being added in, that would qualify as a repurpose of the DeptID and a new one will need to be requested. Is your description change for a DeptID created, but never used? (Check the <u>DeptID status in CalPlan</u> in the Tools and job aids section) If the DeptID is marked for inactivation, you will need to request a new DeptID as the DeptID status was updated in BFS to remove the ability to plan to the DeptID in CalPlanning.

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<ul style="list-style-type: none"> To add a <u>new</u> DeptID(s) to an existing Org Node 	<p>Form: DeptID Request Form (Form can be filled out prior to approval)</p> <p>Supplemental Materials:</p> <ul style="list-style-type: none"> Excel version of the Division's Org Tree highlighting proposed change Identification of new DeptID code(s) or request for new range(s) If making description changes to existing DeptIDs also complete a Description Change Request Form 	<ul style="list-style-type: none"> New DeptID codes will need to be assigned by the DFL based on the next available code within the range(s) assigned to your division. Use the BFS General Ledger Chartfield Report to find out the available DeptID(s) for your department. (See the <i>How to Find Available DeptIDs</i> in the Tools section). If there are no available DeptIDs, the DFL will need to request a new range. See Description changes Guidelines when creating descriptions for new org nodes and DeptIDs. If moving DeptIDs between different L4s, the Org Node included in the DeptID description will need to change. Previously used DeptIDs cannot be reactivated or repurposed. 	<p><u>Questions to ask</u></p> <ol style="list-style-type: none"> Are you creating a new department or business? Are you sure that you are not duplicating an existing DeptID description, information or activity? If so, consider combining DeptIDs into a new one. Is there payroll associated with the new or transferred DeptID(s)? If so, will the new Org Node be the new Home Department or will you utilize an existing one? Have you considered this change in relation to your overall organizational structure? Are activities moving into the new DeptID from an existing DeptID? If so, what is happening to the old DeptID? If the amount of activity remaining in the old DeptID is less than 50% of what it once was it may need to be reviewed as well?

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<ul style="list-style-type: none"> To add <u>one</u> new Org node Hierarchy (L3, L4, L5, L6 under the same top level node) or to add an Org Node to <u>one</u> existing Org Node Hierarchy including adding new or existing DeptIDs 	<p>Form: Org Node Request Form (Wait for approval before filling out form)</p> <p>Include:</p> <ul style="list-style-type: none"> Identification of new Org Node code(s) If new L4 is being added, request for new Dept Prefix (supply the last three digits and use XX for first 2 digits for L4, L5 and L6) Identification of new DeptID code(s) or request for new range(s) <p>Supplemental Materials:</p> <ul style="list-style-type: none"> Excel version of the Division's Org Tree highlighting proposed change If making description changes to existing DeptIDs also complete a Description Change Request Form 	<ul style="list-style-type: none"> See guidelines above for creating new DeptIDs or transferring existing DeptIDs. See Description changes Guidelines when creating descriptions for new org nodes and DeptIDs. Transfers between Divisions must be approved by the Dean/VC (or Designate) of both Divisions and must be documented on the last page of the request form. New L4s/Departments (and the L5s and L6s below them) will require a unique Dept Prefix If transferring DeptIDs between Org Nodes and the original Org Node will need to be deleted, please use the Entity Hierarchy Redesign Request Form instead of the Org Node Request Form If moving DeptIDs between different L4s, the Org Node included in the DeptID description will need to change. 	<p><u>Questions to ask</u></p> <ol style="list-style-type: none"> Are you creating a new department or business? Is there payroll associated with the new or transferred DeptIDs? If so, will the new Org Node be the new Home Department or will you utilize an existing one? Have there have been financial reporting line changes within the division that require a new org hierarchy? Have you considered how the new Org node hierarchy will fit in with your overall organizational structure? Are there DeptID movements between divisions?

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<ul style="list-style-type: none"> • To complete multiple changes related to entity hierarchy redesigns including: <ul style="list-style-type: none"> ○ Addition of <u>new</u> DeptID(s) to an existing Org Node ○ Changes to multiple Org Nodes ○ Transfers of DeptIDs between new and existing Org Nodes ○ Deletions of Org Nodes from the tree ○ Shifting Org Node levels ○ Propose DeptID inactivations for Budgeting Purposes 	<p>Form: Entity Hierarchy Redesign Request Form (Wait for approval before filling out form)</p> <p>Include:</p> <ul style="list-style-type: none"> • Identification of new Org Node code(s) • If new L4 is being added, request for new Dept Prefix (supply the last three digits and use XX for first 2 digits for L4, L5 and L6) • Identification of new DeptID code(s) or request for new range(s) <p>Supplemental Materials:</p> <ul style="list-style-type: none"> • Before and after excel versions of the Division's Org Tree highlighting proposed changes (color code types of changes) • Before and after Visio versions of the Division's Org Tree highlighting proposed changes (color code types of changes; see Tools section for creating Visio files) • If making description changes to existing DeptIDs and/or Org Nodes also complete a Description Change Request Form 	<ul style="list-style-type: none"> • The redesign should reflect your Division's financial management and reporting needs. • See guidelines above for creating new DeptIDs or transferring existing DeptIDs. • See Description changes Guidelines when creating descriptions for new org nodes and DeptIDs. • New L4s/Departments (and the L5s and L6s below them) will require a unique Dept Prefix • If moving DeptIDs between different L4s, the Org Node included in the DeptID description will need to change. • For proposed DeptID inactivation, an alternate DeptID is required in order to map budget/Forecast data to the replacement DeptID. The alternate DeptID must be within the same L6 Org Node and still be active. • A Home Department is required for New Org Nodes with payroll activity. The Home Department can be a new or existing one. • Transfers between Divisions must be approved by the Dean/VC (or Designate) of both Divisions. Approvals must be documented on the last page of the form. • Org Nodes cannot be deleted if there are DeptIDs (active or inactive) associated with them that have not yet been reassigned to another Org Node. • Pending requisitions and purchase orders must be adjusted <u>before</u> an Org Node can be deleted. 	<p><u>Questions to ask</u></p> <ol style="list-style-type: none"> 1. Are you creating a new department or business? 2. Is there payroll associated with new or transferred DeptIDs? If so, will the new Org Node be the new Home Department or will you utilize an existing one? 3. Have there have been financial reporting line changes within the division that require this new organizational hierarchy? 4. Are there Org Node/DeptID movements between divisions? 5. Have you considered the changes to prior actuals? Any historical data will move along with the DeptIDs. 6. Have you considered security access changes for related systems? 7. Have you checked for pending requisitions and POs in Bear buy that will be affected by the hierarchy change?