

Finance – One Washington Square – San José, CA 95195-0008

Main: 408-924-1558 Fax: 408-924-1892

This checklist is designed to assist campus department end users in identifying tasks to complete when a change to their organizational structure occurs. These tasks should be completed after you have received confirmation that the Organization Change Request form submitted to the [Budget and Risk Management](#), Extended Zip 0004, has been completed. For an overview, please see the [Department Organization Change Guideline](#).

This checklist is a reference tool only; it is not to be submitted to Finance. We have highlighted all tasks that have some type of impact on department finances, and included other non-finance related tasks that may need to be completed. Please use this checklist as a reference, consulting with the appropriate entities as indicated below.

Checklist

Task to Complete		Contact Information
<input type="checkbox"/>	Submit System Access Request form to Security Administrator for changes to security in FTS, CFS, and HCM.	ISS Help Desk (408) 924-1530
<input type="checkbox"/>	Submit Position Management Action form to HR to: <ul style="list-style-type: none"> • Move positions between department • Update absence reporting structure for existing positions • Change funding information for existing positions • Create new positions 	Human Resources (408) 924-2250
<input type="checkbox"/>	Submit a service request to Information Technology Services (ITS) to update SJSU online directory.	ISS Help Desk (408) 924-1530
<input type="checkbox"/>	Submit request to Bursar's Office to change chartfield mapping for e-Market stores.	Bursar's Office (408) 924-1601
<input type="checkbox"/>	Submit request to the following service departments, as appropriate to update default chartfield information. <ul style="list-style-type: none"> • Telecommunications (phone charges) • Distribution Services (postage) • Contracts & Purchasing Services (Campus Copier Program) 	ISS Help Desk (408) 924-1530 Distribution Services (408) 924-1590 Campus Copier Program (408) 924-1566
<input type="checkbox"/>	Complete a ProCard/GoCard Application form as appropriate to: <ul style="list-style-type: none"> • Update Approving Official information • Update default chartfield information 	FinanceConnect (408) 924-1558
<input type="checkbox"/>	Change chartfields for open transactions in Financial Transaction Services (FTS).	FinanceConnect (408) 924-1558
<input type="checkbox"/>	If travel is funded from the effected deptID(s), contact you Division/College Super User to update/setup the approval structure as appropriate.	
<input type="checkbox"/>	Review open Purchase Orders in CFS Data Warehouse and submit a Change Order request, as appropriate to correct chartfields.	FinanceConnect (408) 924-1558

<input type="checkbox"/>	After all of the steps above have been completed, create Budget Journals, Expense Journals, and HR Expense Adjustment in FTS to correctly classify expenses.	
<input type="checkbox"/>	Contact the Property Office to change the Custodian deptID and/or location for tagged assets	Property Office (408) 924-1565

Contacts

- **Budget and Risk Management**
Phone: 408-924-1558 Email: financeconnect@sjsu.edu
Website: http://www.sjsu.edu/finance/about_us/budget/
- **Bursar's Office**
Phone: 408-924-1601 Email: bursar@sjsu.edu
Website: <http://www.sjsu.edu/bursar/>
- **Campus Copier Program**
Phone: 408-924-1566 Email: ccp@sjsu.edu
Website: http://www.sjsu.edu/finance/about_us/core_services/ccp/index.html
- **Distribution Services**
Phone: 408-924-1590 Website: http://www.sjsu.edu/finance/about_us/dist_services/index.html
- **Finance Support**
Phone: 408-924-1558 Email: financeconnect@sjsu.edu
Website: <http://www.sjsu.edu/finance/financeconnect/>
- **Human Resources**
Phone: 408-924-2258 Website: <http://www.sjsu.edu/hr/>
- **ISS Help Desk**
Phone: 408-924-1530 Email: info-support@sjsu.edu
- **Property Office**
Phone: 408-924-1565 Website: http://www.sjsu.edu/finance/about_us/core_services/ccp/index.html

Forms/Guidelines

- **Change Order Request:** http://www.sjsu.edu/finance/policies_guidelines/change_order/index.html
- **Department Organization Change Guidelines:**
http://www.sjsu.edu/finance/policies_guidelines/dept_org_change_guidelines/index.html
- **System Access Request:** <http://my.sjsu.edu/employees/forms/index.html>
- **Position Management Request:** http://www.sjsu.edu/hr/docs/wfp/forms/position_mgmt_action_form.pdf
- **ProCard and GoCard Applications:** http://www.sjsu.edu/finance/forms/forms_by_dept/ap_forms/index.html