SJSU

Department Organizational Changes
Guideline for Completing Finance Related Tasks

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This guideline is designed to assist campus department end users in identifying tasks to complete when a change to their organizational structure occurs. While this list is not comprehensive, it does highlight all tasks that have some type of impact on department finances. Please use this guide as a reference, consulting with the appropriate entities as indicated below.

Change Type

The first step is to determine what type of change is taking place, and what changes to the organization structure are needed. Once you have identified the change(s) that appropriately fit your needs, you will complete the Department Organization Change Request form and submit it to the Budget and Financial Management Office.

- **Merging Departments:** This would be when two or more existing departments are becoming one. When departments are merging, you'll want to consider how this will effect historical reporting. If you are interested in maintaining a history of what the organization was like prior to the merge, you might consider creating a new department.
- **Splitting Departments:** When an existing department is becoming two (or more). When splitting a department, you may also need to request a new department.
- **New Departments:** An entirely new department is being created, needing a new deptID.
- **Renaming Departments:** Changing the name/description of an existing deptID.
- **Inactivating Departments**: An existing deptID is no longer being utilized and needs to be deactivated.
- **Moving Departments:** When an existing department is moving in the organization structure. This could be a move to a different college, service group, or division.

Submitting the Organization Change Request

Once you've determined what structure changes are needed, you'll need to submit a Department Organization Change Request form to the appropriate Budget Office Analyst. To complete the form, you will need to provide the following information:

1. Requester Information (Name, department, phone, email address, building, room number, and extended zip)
2. Action Requested (Change type(s) as identified from above)
   - Merging department (provide deptIDs)
   - Splitting department (provide deptID)
   - New deptID created (provide new dept name/description, building, room number, and extended zip (if any))
   - Renaming existing department (provide deptID, current name, and new name)
   - Inactivating department (provide deptID)
   - Moving department within the organization structure (provide deptID/name to be moved, the deptID/name where the moving department currently resides, the deptID/name of where the deptID should be moved)
3. A detailed description of why the change request is being made
4. Whether or not there are positions associated with this department
5. Whether or not there is student fee revenue (e.g. ,course fees) that needs to be realigned

6. The subject and catalog number(s) to be modified
7. The ChartFields where revenue is currently being collected
8. The new ChartFields where revenue will be redirected

The Budget and Financial Management Office will confer with the requester to determine if the action requested is appropriate for the intended outcome, gather any additional information needed to complete the request, and submit an IT Help Desk ticket on the requester’s behalf. Please know that any changes to the collection of student fee revenue will be completed at this time; it is not an additional task for the requester to complete.

Once the request in the IT Help Desk ticket is completed, the requester will then need to work with their college/department budget analyst to complete the following tasks (if needed).

Security and System Access Updates

Department access and roles may need to be modified depending on the changes occurring within your organization. Be sure to review system access information for management/staff/faculty in the affected departments and submit System Access Request form as necessary. The system access request form will grant or modify changes to the following systems:

- Financial Transaction Services (FTS)
- Common Financial System (CFS)
- MySJSU - PeopleSoft HR and Student (HCM)

Position Changes

Are positions moving as a result of this organizational change? If so you may need to:

1. Transfer the budget associated with those positions (see Budget Review section for further information).
2. Update the ChartFields associated with those positions to reflect the correct ChartField for the payroll expenses.
3. Create new positions
4. Update reporting structure and absence management
5. Modify the SJSU A-Z Directory and/or Staff Directory

Working with Human Resources

When an organizational change requires changes to positions, work with the Human Resources department to:

1. Create a new position
2. Make changes to the reporting structure (Absence Management) of an existing position
3. Update an existing position’s report to deptID
4. Update an existing position’s funding source
5. Make changes/new CSU Units (Check Sort)

The majority of these changes are accomplished by completing the Position Management Action form. You will need to complete this form for each position. Please contact Human Resources Workforce Planning office with any questions on completing the form.

Working with Telecommunications

Often times, positions move as a result of an organizational change. When this happens the SJSU staff directory will need to be updated to have position incumbents listed in the correct departments. When necessary, please send a service request to the IT Service Desk, phone (408) 924-1530 or email ithelpdesk@sjsu.edu, to assist you with these changes.

Revenue Changes

Student Fee Revenue

A number or organizations collect some type of student fee revenue (course fees). When an organizational change occurs, you'll want to make sure that any fee revenue that is currently being collected is realigned to the appropriate location. This will be completed when the Organization Change Request form is submitted to the Budget and Financial Management Office (see Submitting the Organization Change Request section above).

E-Market

E-market is a service provided by the Bursar's Office that allows campus departments to collect money for approved services/products/fees via online storefronts. If the ChartFields or access to an existing e-Market account needs to be modified, please contact the Bursar's Office.

Expense Changes

There are a number of expenses, both intermittent and routine that post to an organization's budget throughout a fiscal year. When an organizational change occurs, take the time to review the following to ensure expenses are posted to the appropriate ChartFields.

Recurring Expenses

Certain expenses are charged to campus departments on a monthly/quarterly basis. These expenses have default ChartFields identified in advance of the expense being allocated. When an organizational change occurs, you will want to review the default ChartField information for:

- **Telecommunications expenses:** Each campus department has a default fund and deptID identified for all telecommunications expenses. Please contact Unified Communication Services if changes to default ChartFields need to be made or if phone lines have moved between departments.
- **Postage expenses:** Each campus department has a default fund and deptID identified for distribution services (postage and shipping) expenses. Please contact Distribution Services if a new default ChartField needs to be established.
- **University ProCard or GoCard:** When campus department end-users obtain a university ProCard or GoCard, a default fund and deptID and Approving Official are identified. Please contact the ProCard or GoCard coordinator in Accounts Payable if changes to the default ChartField or Approving Official need to be made.
- **Campus Copier Program:** Default fund and deptID are identified for all copiers that are part of the Campus Copier program. Please contact the Campus Copier Program coordinator if changes to the default ChartField, key operator, or location need to be made.

Open Transactions in Financial Transaction Services (FTS)

It is wise to review any open transactions (Requisitions, Direct Pays, Employee/Student Reimbursements, Travel Reimbursements, etc.) in FTS when an organizational change takes place. ChartField information for an open transaction may need to be modified or an Approving Official may change. For assistance in reviewing open transactions for your department, contact FinanceConnect at financeconnect@sjsu.edu or (408) 924-1558.

Encumbrances

A department can have a number of open purchase orders (POs) at any given time. When an organizational change occurs, review any open encumbrances for the departments affected to determine whether the deptID needs to be changed. In many cases, a change order request will need to be submitted to Contracts and Purchasing Services to update any open POs or requisitions that do not yet have expenses against them. It may be too late to change the encumbrance, in which case you will need to submit an FTS Expense Journal when the order is paid. If you are unsure of how to proceed, work with your college/division Budget Analyst and Contracts and Purchasing Services.

Budget Review

Once you have determined what changes to the department tree structure you will be requesting, you should begin to review your organization's budget and what adjustments, if any, will need to be done. Consider the following:

- Positions may be moving, so the budget will need to be realigned to accurately reflect the location of the expenses. This can be accomplished by utilizing the Budget Journal component in Financial Transaction Services (FTS). In instances where there are a large amount of budget transfers to be completed, you may be able to provide a journal upload to the appropriate division analyst in the Budget and Financial Management to assist you in completing the budget transfers.
- Existing expenses may need to be redirected. Be sure to modify the budget to align with the changes. This can be completed in FTS, using the Expense Journal component.
- HR Expense Adjustments may need to be made. This can be completed in FTS, using the HR Expense Adjustment. An adjustment can only be made once, so the Budget and Financial Management Office suggests waiting a few months to perform these adjustments, allowing processing time for any adjustments made by Human Resources and/or State Controller's Office to be complete.

Equipment Changes

If the custodian department or location has changed for tagged equipment, you should have the record in the Asset Management system updated. Please contact the university Property Coordinator.

Resources

Forms

Department Organization Change Request (http://www.sjsu.edu/finance/docs/dept_org_change_form.pdf)

Position Management Action (http://www.sjsu.edu/hr/all_forms/#P)

System Access Request (http://its.sjsu.edu/services/info-security/security-access-request/index.html)

References

Campus Copier Program (http://www.sjsu.edu/finance/about_us/core_services/ccp/index.html)

Change Orders (http://www.sjsu.edu/finance/policies_guidelines/change_order/index.html)

GoCard (http://www.sjsu.edu/finance/financeconnect/resources/pathways/gocard/index.html)

ProCard (http://www.sjsu.edu/finance/financeconnect/resources/pathways/procard/index.html)

University Departments

Accounts Payable (http://www.sjsu.edu/finance/about_us/ap/index.html)

Budget and Financial Management (http://www.sjsu.edu/finance/about_us/budget/)

Bursar's Office (http://www.sjsu.edu/bursar/)

Contracts and Purchasing Services (http://www.sjsu.edu/finance/about_us/purchasing/)

Distribution Services (http://www.sjsu.edu/finance/about_us/dist_services/index.html)

Human Resources (http://www.sjsu.edu/hr/)

IT Help Desk (http://its.sjsu.edu/support/)

Property Office (http://www.sjsu.edu/finance/about_us/purchasing/property/index.html)

Unified Communications Services (http://its.sjsu.edu/services/phone-uc-services/)