



**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

It is important to determine what type of change is taking place and what changes to the organization structure are needed. Types of changes include:

- **New Departments:** This is when an entirely new department is being created and needs a new DeptID.
- **Moving Departments:** This is when an existing department is moving to a different division, college, department, and/or service group in the organization structure. Moving the department can affect hierarchical financial reports in the CFS Data Warehouse.
- **Renaming Departments:** This is when a department needs to change the name/description of an existing DeptID.
- **Inactivating Departments:** This is when an existing DeptID is no longer being utilized and needs to be deactivated.

Submitting the Organization Change Request

Once you've determined what changes are needed, you can submit a [Department Organization Change Request](#) form to the Budget and Financial Management Office using DocuSign. 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)
 - Creating a new department
 - Provide dept name/description, building, room number, and extended zip (if any)
 - Indicate the parent Dept ID and parent level (see below)

	Academic Affairs	All Other Divisions
Level 1	University	University
Level 2	Division	Division
Level 3	Colleges/AVP Office	Department Level 1
Level 4	Academic Department	Department Level 2
Level 5	Sub Department	Department Level 3

- Indicate whether or not there will be positions in the new department and the default payroll fund (if applicable).
 - Moving a department within the organization structure
 - Specify the Dept ID being moved
 - Indicate the parent Dept ID
 - Renaming an existing department
 - Provide DeptID, current name, and new name
 - Inactivating a department
 - Provide DeptID and name
3. Whether or not there is student fee revenue (e.g. course fees) that needs to be realigned
- a. Indicate the chartfields where revenue is currently being collected and 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. 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 Department Organization Change request 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 system 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 Forms](#) as necessary. The system access request forms will grant or modify changes to the following systems:

- PeopleSoft Systems - SJSU@Work and MySJSUPlease remove and move
- Finance Systems - Financial Transaction Services and Common Financial System

Working with University Personnel

When an organizational change requires changes to existing positions, submit a [Position Management Action Form](#) (PMAF) to:

- Make changes to the reporting structure (Absence Management) of an existing position
- Update an existing position's report to DeptID
- Update an existing position's funding source
- Make changes/new CSU Units (Check Sort)

If you have further questions of what types of positions changes can be submitted via the PAMF, please consult University Personnel's FAQ page. Please contact [your payroll representative](#) with any questions on completing the form.

If you need to create a *new position*, please work with the Budget Planning and Financial Management Office if your position has Operating Fund (Fund 70000) funding as well as University Personnel.

Revenue Changes

Student Fee Revenue

A number of 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 [Cashiering Supervisor](#) in the Bursar's Office.

Expense Changes

There are a number of expenses, both intermittent and routine that post to an organization's budget throughout the fiscal year. When an organizational change occurs, 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:

- **University ProCard or GoCard:** When campus department end-users obtain a university ProCard or GoCard, a default chartfield and Approving Official are identified. Please submit a new [ProCard Application](#) or [GoCard Application](#) to update this information.
- **Postage expenses:** Each campus department has a default fund and DeptID identified for distribution services (postage and shipping) expenses. Please contact [Distribution and Asset Services](#) if a new default chartfield needs to be established.
- **Campus Copier Program:** For all copiers that are part of the Campus Copier Program, default fund and DeptID are identified upon setup. 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)

Department users should review all 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 there may be a change to the

Approving Official. For assistance in reviewing open transactions for your department, contact Finance Connect 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 in CFS or CFS Data Warehouse 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 in FTS to update any open POs with encumbrances or requisitions that do not yet have expenses against them. For expenses that have already posted or are being processed, you will need to submit an FTS Expense Journal to move the expenditure to the correct chartfield. 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 processed. Consider the following:

- Operating expense budgets may need to be realigned and existing expenses moved to support the organizational change being made. This can be completed in FTS using the Expense Journal and Budget Journal modules.
 - If the department is being moved between divisions, please submit a budget upload journal to your respective budget office contact, if needed.
- HR Expense Adjustments may need to be made. This can be completed in FTS using the HR Expense Adjustment module. 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 further adjustments made by University Personnel and/or State Controller's Office.

Update Asset Records

If the custodian department or location has changed for tagged equipment, you should update the property record in the Asset Management system. Please contact [Distribution and Asset Services](#) for assistance.

Check the Online Directory

When positions move as a result of an organizational change, we recommend checking the [SJSU online directory](#) to ensure that employee position information (e.g. department, job title, location, and phone number) have been updated appropriately. If you notice any discrepancies after the position has been updated with University Personnel, please submit an iSupport ticket using the SJSU iSupport Customer Login at <https://isupport.sjsu.edu> or by calling (408) 924-1530.

In the iSupport ticket, please include the:

- Employee's legal name
- Employee ID

- Department ID
- Location (building, floor, and room)
- Phone number

An information technology representative will contact you if they have any questions.

Resources

Forms

[Department Organization Change Request](https://app.docusign.com/templates/details/d1c0cdb0-f0e8-40e2-9c73-87af77bfc663) (https://app.docusign.com/templates/details/d1c0cdb0-f0e8-40e2-9c73-87af77bfc663)

[Position Management Action Form](http://www.sjsu.edu/up/all_forms/pos_mgmt_docs/) (http://www.sjsu.edu/up/all_forms/pos_mgmt_docs/)

[System Access Request](http://www.sjsu.edu/it/security/forms) (http://www.sjsu.edu/it/security/forms)

References

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

[GoCard](http://www.sjsu.edu/finance/financeconnect/resources/pathways/gocard/) (http://www.sjsu.edu/finance/financeconnect/resources/pathways/gocard/)

[ProCard](http://www.sjsu.edu/finance/financeconnect/resources/pathways/procard/) (http://www.sjsu.edu/finance/financeconnect/resources/pathways/procard/)

University Departments

[Accounts Payable](http://www.sjsu.edu/finance/about_us/ap/) (http://www.sjsu.edu/finance/about_us/ap/)

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

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

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

[Distribution and Asset Services](http://www.sjsu.edu/finance/about_us/dist_services/) (http://www.sjsu.edu/finance/about_us/dist_services/)

[University Personnel](http://www.sjsu.edu/up/) (http://www.sjsu.edu/up/)

[IT Service Desk](http://sjsu.edu/it/support/) (http://sjsu.edu/it/support/)