Reorganizations - Department Name Changes - New Budget Administration/Management Responsibilities

Has your office experienced reorganization, a department name change and/or personnel job responsibility changes in the last couple of years? Is your office going to be experiencing these in the near future? If so, there are some critically important tasks that need to be addressed.

<u>Reorganizations</u>:

1. Do employee's salary budgets need to be moved to a new FOAP? Send this information to **Allen Zernich, (ML 4524)** by May 15 of each fiscal year to be effective for July 1 due to the complexity of the process and coordinating the Finance System and Human Resource System.

2. Have positions been created either by restructuring existing positions or by creating totally new positions and you are ready to begin the hiring process?
   a.) When the restructuring of a position changes the job title a new position is created and will then need to be entered through Silk Road. If necessary a budget revision is needed to correct the FOAP.
   b.) If the same position number is used then the Position Action Form (PAF) must be completed accurately with all necessary information. Source of funds for new positions must be identified on the form and the PAF should be accompanied with a budget revision, if necessary, to move funding to the correct FOAP where salary and benefits will be expensed. If a position is created through restructuring an existing position, this information should be included in the comments on the PAF.

3. Do student employment or graduate assistant expenses and budgets need to be moved to different orgs? Contact **Vicki Clary, (x 4880)** in Career Development about positions and contact **Allen Zernich, (x 3712)** about budget revisions.

4. Will a new org for operating expenses or payroll be needed? Request the creation of a new org by completing the Org Action Form found on the Financial Planning and Budgeting Office website and sending it to **Shawn Schuler, (ML 4524).** The Controller's office will contact you once the org has been created with links to the next steps, which are:
   a.) Signature Authorization Form to be completed (one per org) with only those individuals who are permitted to spend the funds in the org. When completed, send this to **Accounts Payable, (ML 4531)** in the Controller's Office.
   b.) Administrative Access Request Form for each individual who will need to view the org in the Finance System.

5. When new orgs/funds are created, make sure you are using the correct FOAP information with University service departments. If new accounts need to be set up with certain service departments, contact them prior to using their services:

Service		Contact Department
On-line office supply vendor	:	Monica Human – **(x 3676)**
Long Distance charges	:	Bob Blasingame – **(x 4899)**
Post Office Charges	:	Todd McDillon – **(x 3558)**
Copy Charges	:	Brandi Bryant – **(x 2935)**

6. Have employees been given new responsibilities pertaining to budgets?
    See New Budget Administration/Management Responsibilities below.

7. Another consideration - employees who are no longer responsible for budgets:
    The Administrative Access Request Form should be completed to remove their finance system access. New Signature Authorization Forms should be completed for removing and/or updating signatory's respective funds and orgs.

8. Have Positions been reclassified?
    The Position Action Form must be completed and forwarded to the offices as described on the form.

Department Name Changes:

1. When a department changes its name it may be necessary to change the name of the operating org associated with the department. In order to change the name of an org the Chair/Director of the Department should complete the Org Action Form and send it to **Shawn Schuler, (ML 4524).**

2. When an Org name is changed the following two forms need to be completed.
Signature Authorization Form to be completed (one per org) with only those individuals who are permitted to spend the funds in the org. Administrative Access Request Form for each individual who will need to view the org in the Finance System.

New Budget Administration/Management Responsibilities

There are a number of steps which need to be taken upon receiving responsibility for Budget Administration.

1. Signature Authorization Form to be completed (one per org) or fund with only those individuals who are permitted to spend the funds in the org/fund signing the form. Even those who have signed the form but haven't had any changes to their signature authority must also resign the updated form.

2. If you need help determining the list of funds/orgs in your area you can call **Dan Crespo, (x3722)** in the Financial Planning and Budget Office

3. An Administrative Access Request Form will need to be completed for each new employee or those with new Budget administration duties who need to view orgs/funds in the Finance Administrative System. You can get this form through the portal.   Click on the *Employee Hub* section and then click on the *Nexus* application.   You will find the Administrative Access Request Form in this section.   Upon completion, an electronic submission will transmit to the Controller's Office.

4. New employees or those with new Budget Administration duties will need training in the Financial Administrative System. Contact the Controller's Office or visit the Financial Self-Service Training Website to schedule an appointment for Finance System Training. You should also begin to familiarize yourself with the Financial Planning and Budgeting Office Website and the Controller's Website.