I. Purpose

With the implementation of the integrated Banner administrative systems, the department codes used in Finance, Advancement, and Human Resources are defined in the Finance Chart of Accounts table. An organization change of any kind that is entered into Banner may impact on Banner Security, access to positions and approvals tables through HR OnLine, access to departmental leave reporting process, ability to determine available funds on affected positions, access to purchasing cards, SEAPRINT, and other systems across campus that use Banner data in granting access or in processing. The purpose of this policy is to provide uniform guidance for establishing new departments, combining, or collapsing departments, renaming departments, moving departments within the university structure, or moving employees between departments.

II. Scope

This policy applies to all Divisions and Departments.

III. Policy

All division/department changes should be initiated by May 1 in a given year in order to be effective at the beginning of the new Fiscal Year on July 1. Changes made at any other time of the year that effect the Banner ORGN code will have ramifications both in Finance and in Human Resources records that make processing for the remainder of the fiscal year extremely difficult.
IV. Procedures

A. All divisions and departments must adhere to the following procedures when requesting the following changes:

1. Adding a new department
2. Combining or Collapsing
3. Moving a department within the University
4. Renaming a Department

B. An Organizational Chart must be prepared showing the position of the new or changed department in the division, the department head, and all the positions/employees/faculty reporting to the new department.

C. The Name of the new department must be approved by the Division Vice Chancellor, using the following guidelines:

1. The name of a new department should not be easily confused with department names in the same or other divisions.
2. The name should give a clear sense of the purpose of the new department to those outside the division/university.
3. A thirty or less character version of the name should be provided to the Controller’s office for entry to FTVORGN. The department name entered in FTVORGN is the name used in all reporting from the Banner system.

D. After the new Organizational Chart and department name have been approved by the Division VC, the administrative person in the division should forward a copy of the approved chart to the following Administrative Offices for simultaneous review.

1. Human Resources
2. Controller’s Office
3. Budget Office
4. Financial Systems

E. The administrative person handling the organizational change in the department/division must make an appointment to meet with the Banner ORGN Committee. (This isn’t required if the only change is in the name of the
department.) This should be done by May 1 in order to have Banner set up to handle the new/moved/changed ORGN by July 1. The Banner ORGN Committee will be available on Monday afternoons throughout the month of May each year, and other times as requested.

The ORGN committee will be Chaired by the Controller’s Office and will have representatives from the following departments: Controller’s Office, Budget, Human Resources, and Financial Systems.

1. The Comptroller’s Office will review the current Chart of Accounts and will determine the timing and placement of the new or moved ORGN code.

2. The Budget Office will assist departments in generating HR3.30s to move positions to support the new/changed organization.

3. Human Resources will work with departments in determining the leave keeping ORGN for employees affected. HR will also determine if new HR On-Line approvals tables need to be built, and if changes need to be made to current tables. HR will use the new organizational chart to enter supervisor position numbers to the Banner position table.

4. Financial Systems maintains security for Finance and HR users. Access for Finance and Human Resources is affected by ORGN changes and this committee will work with departments to reset access as needed.

F. Addendum 1 of this policy provides a check list of the tasks that must be completed and the communications that are required in order to establish the new department as an ORGN in the Banner FTVORGN table and to ensure that routine processing through Banner and HR OnLine is possible.