1. **Purpose/Introduction**
   The purpose of this procedure is to provide uniform guidance for establishing new departments, combining, or collapsing departments, moving departments within the university structure, or moving occupied or unoccupied positions between departments.

2. **Definitions**
   An organizational change is a change required to Banner ERP elements to appropriately reflect changes made within the university structure.

3. **Procedural Steps**
   A. All divisions and departments must adhere to these procedures when requesting the following changes:
      1. Adding a new department
      2. Combining or Collapsing departments
      3. Moving a department within the University
      4. Splitting 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 Financial Planning and Budgets Office for approval prior to entry in Banner. No commas (,), slashes (both forward and
backslashes), period (.), and/or any other symbol that may cause reporting or query issues, should be used in the name. The department name, entered in Banner, is the name used in all reporting from the Banner system. The character version of the organizational code is coordinated through the Office of Data Management.

4. The name and character version of the organization code will need to be added to the department abbreviation table (STVDEPT) used by Banner Student. Any problems between these two lists (FTVORGN and STVDEPT) will be resolved prior to the effective date.

D. Notification will need to be given to Accounting Services and the Financial Planning and Budgets Office prior to May 1 for changes to be implemented on July 1.

E. New security information should be provided to the Systems and Procedures Office so appropriate access can be granted within Banner Finance and Banner Human Resources. In the case where an academic department is undergoing an organizational change, the department needs to specify in writing to the University Registrar’s Office as to the status of students within the major and whether students will remain coded under the previous organizational identifiers or changed to the new organizational identifiers. In the event that the organizational change is also a curricular change, the department should have already obtained approvals from the appropriate faculty committees.

F. Accounting Services will notify the department when the new chart of accounts information has been entered in Banner Finance by June 30 and all changes will be effective July 1.

G. Once the new organization has been entered in Banner, the department may have to submit the following:

1. A Position Action Form (PAF) will need to be completed to move any positions to the new organization.

2. An Electronic Personnel Action Form (EPAF) will need to be completed to move any people to the new organization. This will ensure that the person is paid from the correct source(s) and that the salary encumbrances will be charged to the correct place.


   Financial Planning & Budgets Policy 3 Organizational Change

5. Revision Table

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