BUDGET POLICY 3 ORGANIZATIONAL CHANGE

The University of North Carolina at Greensboro

Approved by Steve Honeycutt, Interim AVC for Finance, July 1, 2021

Revised July 1, 2021

1. **Purpose**

   The purpose of this policy 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. **Scope**

   The Organizational Change Policy applies to all divisions and departments.

3. **Definitions and Roles and Responsibilities**

   3.1 **Definitions**

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

4. **Policy**

   Many functions and activities of the University follow the academic calendar and the fiscal year. Planning is normally done in advance so that most everything new or changed can be orchestrated and ready for the beginning of the new fiscal year. Circumstances including changes in leadership and resources may call for organizational changes to be made at other times. However, because UNCG has a robust and fully implemented ERP System (Banner), making changes to the key elements must be well coordinated to avoid significant problems. Since organization is one of the key elements, it can only be changed in the Banner system at the beginning of a new fiscal year without severe negative impacts.

   The organization or department code in Banner is a fundamental component of transactions in the Finance, Advancement, and Human Resources modules. These codes are defined in the Finance Chart of Accounts table. An organization change of any kind that is entered into Banner could have an impact on Banner Security, access to positions, access to Electronic Personnel Action Forms and approvals, access to departmental leave reporting process, ability to determine available funds on affected positions, access to
purchasing cards, access to E-Print, and other systems across campus that use Banner data in granting access or in processing.

All notification of division/department changes should be communicated by May 1 each year in order to be effective at the beginning of the new Fiscal Year on July 1. Because of the complexities of Banner, making changes at any other time of the year could cause erroneous reporting, as well as deny access to certain financial and human resource information.

5. Compliance and Enforcement

The Director of Financial Planning and Budgets is responsible for ensuring compliance with this policy.

6. Additional Information

6.1 Supporting Documents

Financial Planning & Budgets Procedure C Organizational Change

6.2 Approval Authority

This policy should be approved by the Interim Associate Vice Chancellor for Finance.

6.3 Contacts for Additional Information and Reporting

- Jennifer Leung, Interim Director of Financial Planning & Budgets, (336)256-1181, jwleung@uncg.edu
- budget@uncg.edu