



THE UNIVERSITY OF RHODE ISLAND

Organization Changes Process

Updated 10.9.24

Financial Strategy & Planning

Organizational Changes

What is an organizational change and what does it impact?

An organizational change can be any of the following:

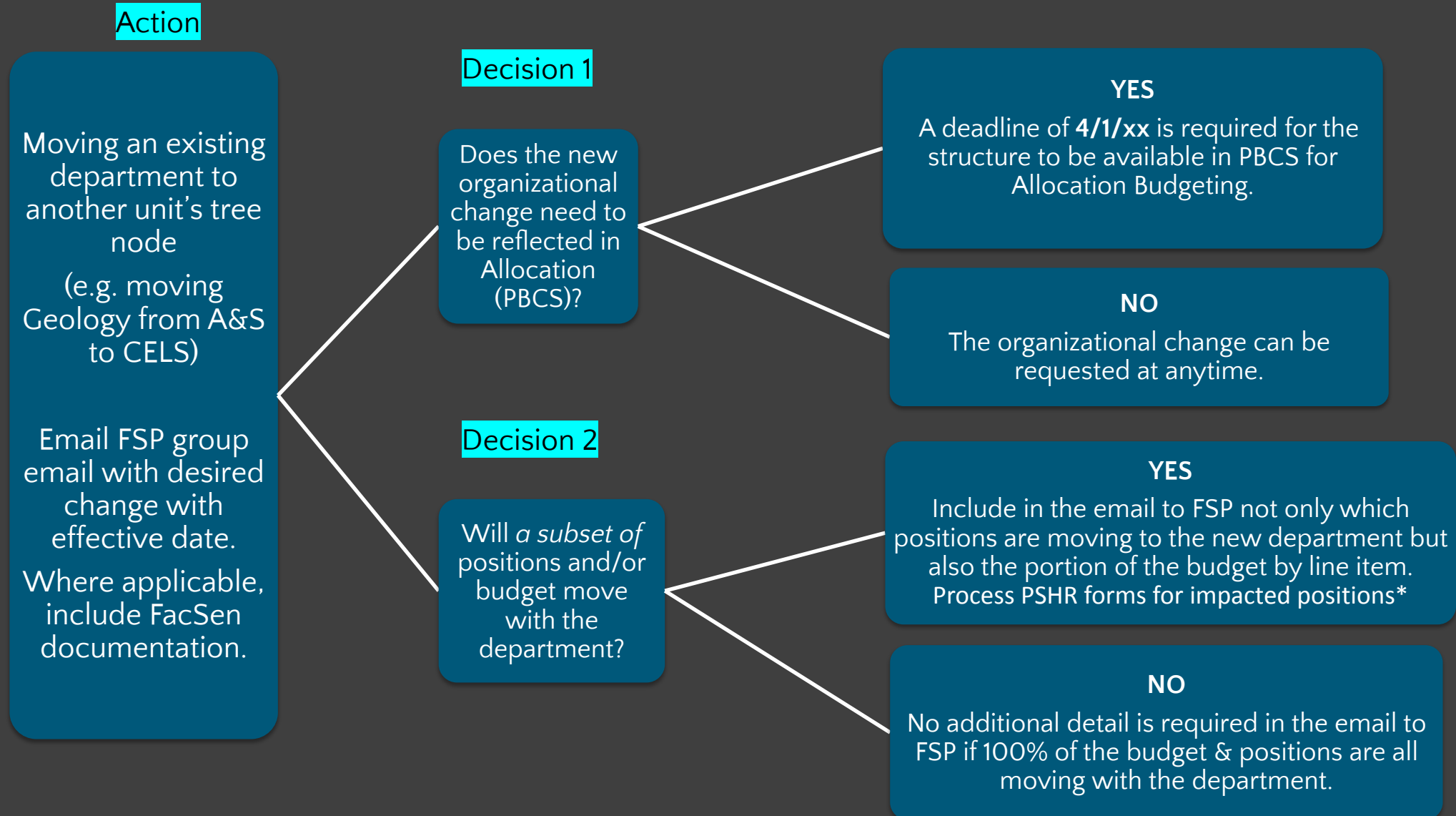
- Name changes for fund, departments or programs
- Movement of a department from one unit to another, also known as a PeopleSoft tree change.
- Adding a new fund, department, program
- A total revamping of a college or unit's departmental structure that requires administrative units on campus to collaborate the complex change. Departments involved include (but not limited to): Financial Strategy & Planning (FSP), Controller, Payroll, HR, Grants, Enrollment Services, etc. *Planning for such a change requires ample lead-time.*
- Impacted systems include PeopleSoft Financials, PeopleSoft HR, PBCS, possibly billing systems or grant systems etc.

Organizational Changes

What is required when requesting an organizational change?

- An email to financial-strategy-planning-group@uri.edu requesting the name change or organizational change with effective date.
- For academic program changes under the purview of the Faculty Senate, including name changes and organizational changes, attach to the email documentation indicating FacSen approval. Additionally, documentation should include effective dates. It is the responsibility of the requesting unit to know if FacSen approval is required.
- All other organizational changes not under the purview of the Faculty Senate require an email to FSP requesting the change including the effective date with a copy to the division head, department managers involved in the change, and CBO involved (if not initiated by the CBO).

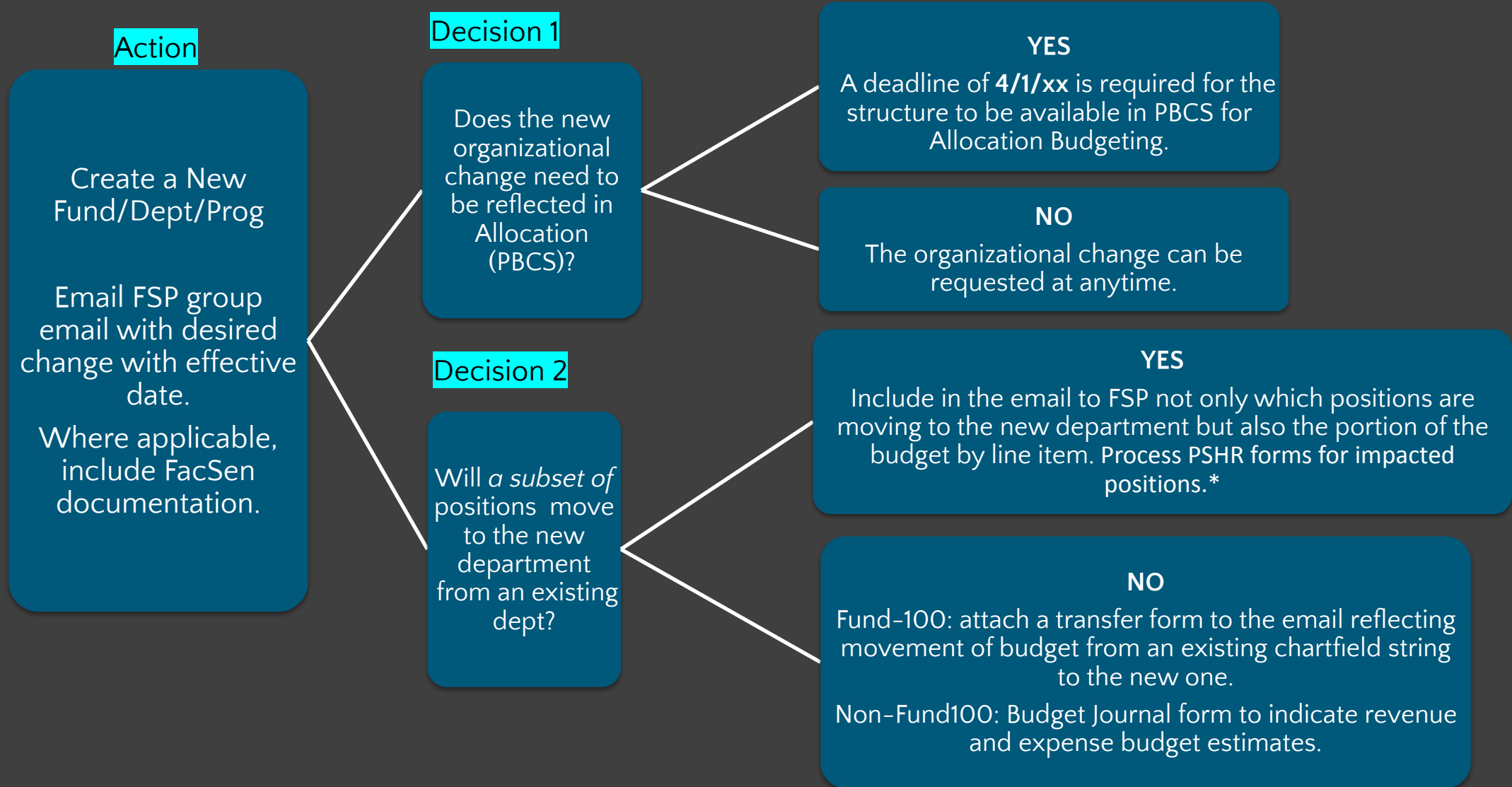
Organizational Change Flowchart



Any org change received after 4/1 (including changes to fund and/or program codes) will not be reflected in PBCS for that Allocation, there will be a disconnect between PBCS and PeopleSoft Financials until next Allocation.

*See slides 6&7 for additional guidance on PSHR forms

Organizational Change Flowchart



Any org change received after 4/1 (including changes to fund and/or program codes) will not be reflected in PBCS for that Allocation, there will be a disconnect between PBCS and PeopleSoft Financials until next Allocation.

*See slides 6&7 for additional guidance on PSHR forms

Organizational Change Flowchart

Action

- Total revamp of hierarchy.
- Inactivating old departments.
- Creating new departments with a nonsystematic movement of positions/budgets/automatic feeds between old and new departments.

Email FSP group email with desired change(s) with effective date.

Requires a long lead time to coordinate with HR, Controller, Payroll, Enrollment Services, Research, FSP, Purchasing, etc.

Coordination across all units to be finalized **4/1/xx**.

*Any org change received after 4/1 (including changes to fund and/or program codes) will not be reflected in PBCS for that Allocation, there will be a disconnect between PBCS and PeopleSoft Financials until next Allocation. Thus, it is important to follow deadlines for org changes between colleges/units so the correct unit can budget appropriately.

Organizational Changes

Faculty Senate Approvals and Approval Documentation:

- To confirm that your action is approved by Faculty Senate, and to retrieve appropriate documentation, visit the website at: www.uri.edu/facsen/legislation. A copy of the approved Bill should be attached to your email request to FSP.
- Approvals from four prior years' can be found on an [archive page](#).
- FacSen approvals include name and org changes.

Organizational Changes

Forms that may need processing to complete organizational changes:

- Email FSP group (REQUIRED) – alerts FSP of a request and a pending change.
 - CFS Request Form – request for new chartfield string
 - Signature Authorization Form – provides signatory levels for new chartfield string
 - Budget Transfer Form – moves budget dollars
- Forms may be found at: <https://web.uri.edu/fsp/forms/>*
- Line-Item Budget – details the budget categories and amounts for new chartfield strings (excel file is sufficient).
 - Position Action Form (PAF) – updates a position to a new home department or funding source in PeopleSoft HR.
 - Employee Action Form (EAF) – updates an employee's home department and salary distribution (if a new fund/department/program has been created)

*** If you have any questions whether an EAF or PAF is needed, please contact Diana MacDonald.*