Purpose: Use this form to submit a request for a **New Org or Org Change** to be made for the start of the upcoming fiscal year. This would include an Org Name Change, New Organization, Org Becoming Inactive, and Reorganization changes.

Deadline: The deadline to request Org Changes is <u>Friday, May 18, 2018</u> for changes affecting FY 19.

The Effective Date for all changes is July 1, 2018. Organizational changes or restructuring of existing Organizations must be implemented at the beginning of the fiscal year to prevent problems with university reports, budgets and/or historical reporting.

Note for Academic Departments: ** The creation of academic organization numbers or a change to an existing academic organization number requires significant lead-time. This process may take two to three years to complete because of Student System requirements for course offerings and the impact to the Class Schedule and Catalog. Approval from various administrative offices is required prior to the creation of the new academic organization. Colleges that are anticipating changes within their organizations need to start early and include Academic Affairs/Faculty Council and the Student System in their planning/approval process. Once approvals have gone through these offices, the Office of Budgets will coordinate with Institutional Research, Human Resources and Business & Financial Services on the implementation process and distribute the information of planned changes taking effect July 1, 2017 to campus.*

To complete the request form, follow the steps below, using the tab key to navigate the form.

1. **Save**: the .pdf file to your computer and rename the .pdf to a meaningful name.
2. **Initiator Name & Initiator Email:** Whoever submits the form should include their name and email.
3. **Explanation for Organizational Change:** All Org changes must have an explanation that clearly identifies what is driving the change. (Why is there a need for this change?)
4. **Description or Explanation:** Provide details of what is occurring and why. Be clear and concise in providing adequate explanation so approvers can easily understand what they are being asked to review and approve.
5. **Org Changes which can be completed on this form:** of the four types of changes below, check the box left of the type of change and the required criteria will drop down.
   a. **Organization Name Change:** All fields must be populated. The "Responsibility Center Code" is the two-letter code for the college or VP area that the Org Reports to (You can find this in KFS under Org Lookup). Also, be sure to select whether Campus Mail should be notified about the change.
   b. **New Organizations:** For New Organizations, the Office of Budgets will assign a new org number, but all other details must come from the area submitting the change. In addition to each of the fields within the New Organization section, you must populate all of the HR details, as well as list all account changes and employee movements that will take place as a result of the New Org. Note that these changes can be populated on pages 2 and 3 of the pdf, or, you can submit an excel document as long as all of the columns on the excel file are identical to the PDF.
   c. **Organizations Becoming Inactive:** All Fields must be populated, also be sure to list all account changes and employee movements that take place as a result of the Inactive Org. Note that these changes can be populated on pages 2 and 3 of the pdf, or, you can

submit an excel document as long as all of the columns on the excel file are identical to the PDF.

d. **Reorganization Changes:** This section is designed to encompass a variety of org movements. A few examples of common Reorganizations include: Consolidate Orgs, Moving Orgs to report to a new area, or making any changes to a Responsibility Center. Regardless of which type of change you process, you will also need to update the necessary HR details. Similar to the two examples above - be sure to list all account changes and employee movements that take place as a result of the reorganization. Note that these changes can be populated on pages 2 and 3 of the pdf, or, you can submit an excel document as long as all of the columns on the excel file are identical to the PDF.

Steps to take for digital signature. *(Note you may need to go to your Control Panel>Display and click on Smaller – 100% default button and reboot your computer in order to complete all the steps below).*

1. Click within the appropriate signature field being completed. Once selected, a window will pop up with ADD Digital ID, prompting you to insert a digital signature.
2. A new window will open prompting you to select an existing digital ID used from a prior form, or a new digital ID to be created now. Select "a new digital ID I want to create now". Click "Next".
3. The next window asks where you would like to store your new self-signed digital ID, either in a "New PKCS#12 digital ID file" or in a "Windows Certificate Store". Please read the descriptions and determine which storage location is more effective for your personal usage. Select your preferred location, and click "Next".
4. The next screen asks for your personal information needed to electronically sign your name on forms. Proceed to fill out the following sections as:
   a. Name: Your Name
   b. Organizational Unit: Your Department (i.e. Office of Budgets)
   c. Organization Name: Colorado State University
   d. Email Address: Your Assigned CSU Outlook Email Address, select "Next"
   e. Country/Region: Leave as Selected: US – United States
   f. Enable Unicode Support: Leave Unchecked
   g. Key Algorithm: Leave as Selected: 1024-bit RSA
   h. Use digital ID for: Leave as Selected: Digital Signatures and Data Encryption
5. Once all of the following categories have been completed, click "Next".
6. The next window will prompt you to create a password to "Sign" your new digital signature with. Make sure it is something secure, but also something you will remember. If you forget your password, a new one cannot be created, and you will have to create an entirely new digital signature. Once your password is entered, click "Next".
7. This will complete the process of creating your digital signature. You are now ready to sign your Org Change Request Form.
8. After selecting the proper signature line to sign, select your digital ID from the "Sign As" drop-down menu, enter your password, and click "Sign".

9. Your digital signature will be validated, and that signature line will then be locked, where it cannot be re-signed or changed. The form will then prompt you to create and save a copy of the form.
10. Each time a new signature is added, the form needs to be resaved as a new version to allow the signature to be final.
11. After signing and creating an updated copy with each appropriate signature, complete the corresponding date of signature and save once more, before sending it along to the next person needing to sign.
12. Save and print the document for your records, if desired, and forward to next approval level.
13. Once all signatures are entered, saved, and dated, please submit the Org Change Form to the Office of Budgets for final review and processing. Email to: Travis.Webb@colostate.edu