

Procedures for Completing the New Org and Org Change Form

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 Friday, April 23, 2021 for changes affecting FY 22.

The Effective Date for all changes is July 1, 2021. 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, 2021 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:** below are the four types of Org changes which can be manually processed using the attached form.
 - 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

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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.
 - e. **Obtain Authorization Signatures:** Previously this was done with a digital signature. For FY22 all signatures will need to be manually signed because of an Adobe update has temporarily caused the form to loose dynamic functionality.
6. **Submission:** After all required individuals have signed, submit the form for consideration by scanning and emailing it to: Travis.Webb@colostate.edu
 7. **Budget Office Review:** Upon receipt of the request, final review and processing will take place by the Office of Budgets and decisions regarding pending requests will be communicated back to the initiator. Approved requests will be disseminated to all central offices.