

Chart of Accounts (COA) Maintenance**DeptID Request - NEW**

Use this form to request the setup of a new deptID. This form must be filled out electronically.

The effective date for a deptID is April 1 of the current fiscal year.

Refer to the Guide to Financial Management: [Chart of Accounts \(COA\)\Chartfields](#) and to the COA Department ID Management document located in the Forms Cabinet for further details pertaining to deptIDs and this form.

DeptID Number (6 numbers; starting with first 2 numbers of faculty range)		
DeptID Short Description (max. 10 characters)		
DeptID Name (max. 30 characters)		
Long Description (max. 100 characters)		
Budget	REQUIRED: DeptID 3-year budget form is provided on page 3 (the purpose of this information is to assess the appropriateness of the request for a new deptID)	
	Note: Senior Finance Partner (SFP) is responsible for transferring an allocation to the new deptID in uPlan.	
	DeptID budget variance carries forward to itself, OR DeptID budget variance carries forward to the College, Faculty or VP portfolio	
Budget Owner	Employee name	
	Employee ID	
	One-over-one deptID number (for electronic approvals routing)	
	One-over-one approver name	
	Confirmation of one over routing	REQUIRED: SFP has reviewed DEPTID_BUD_OWNER tree to ensure one-over-one approval routing is appropriate (i.e. the budget owner for the one-over-one is not the same as the budget owner for the deptID being created, and the budget owner for the deptID being created reports organizationally to the one-over-one)
Reporting FR will automatically create a FSGLV12 for the new deptID (applicable to funds F210, F100 and F310). If other report maintenance is required, complete the nVision Report form.	Does this deptID fall within the range on the COA_ROLLUP_ORG tree?	
	YES DeptID will automatically be included in the rollup V12 report NO Please provide a screen shot of the COA_ROLLUP_ORG tree and indicate where the deptID should be located within the tree.	
	Node name under which this deptID should fall under on the COA_DEPT_DETAIL tree	
Department Level Security Indicate Parent DeptID		
FOR IST INPUT ONLY	Pool Group	
	Stats Faculty Code	
	Location Code	
	Stats Can CIP	

Senior Finance Partner (SFP) Approval

SFP signature is only required if an individual other than the SFP is submitting the form on their behalf. If SFP is emailing the form, signature is not required.

SFP Name and CCID

SFP Signature

Date(mm/dd/yyyy)

ROUTING INSTRUCTIONS

Submission of this form is made to your SFP via [Freshservice](#). You can keep track of the status of your request via Freshservice.

Financial Reporting reviews and approves and sends to IST.

IST reviews, approves, and processes the request.

The request will be assessed and set up within 10 business days. SFP will be notified if this timing cannot be met.

DeptID Budget Form

	Year 1	Year 2	Year 3
Funding			
Budget			
External revenue			
Other			
Total funding			
Expenditures			
Salaries & Benefits			
Supplies & Services			
Other			
Total expenditures			

Provide a brief description of the deptID activity:

Signature Form for Information Services and Technology

Authorized approvers are individuals within a faculty/department who are given the authority to:

- Request or remove access to the University's administrative applications for staff in their department.

This applies to: PeopleSoft Campus Solutions, Finance (including eTRAC and Supply/Net), and HCM

- Manage the CCIDs for staff in their department

Authorized approvers should be University employees; however, Guests and Non-University employees may be authorized approvers where required.

This list of authorized approvers must be signed by the Senior Finance Partner for the specified department IDs.

This signature form is used when a new department ID has been created and authorized approvers are being assigned.

Signed copies will be retained in IST - Enterprise Applications for signature validation purposes.

Faculty/Dept of:

Insert name of Faculty/Dept and
Department ID

Additional Sub-units/Depts/Institutes for this Faculty/Dept

Please provide both Name and Department ID:

Authorized Approvers**Name/Position****CCID****Signature**

CS

Finance

HCM

CCID

1.

2.

3.

4.

5.

6.

7.

8.