DEPARTMENT CHANGE REQUEST FORM INSTRUCTIONS

The Department Change Request Form is used to request a new department or change/delete an existing department. Once the form is submitted, it routes to the Department Administrator/Director, Pres/VP, VP of Finance and Planning for approval, and finally to the Budget Office Director for final approval and processing.

SUBMITTING THE REQUEST

Effective Date of Change – Enter the effective date of the department creation, change or deletion.

Eff Date: 2/18/2019

o   Click on the calendar icon
o   Select the effective date

TYPE OF REQUESTS

Select the radio button to indicate the type of Department Change Request to submit. This will open the appropriate field to be completed.

- Add New Department
- Change Department Name
- Delete Department

FORM COMPLETION AND SUBMISSION FOR EACH TYPE OF REQUEST

Add New Department

DEPARTMENT INFORMATION

Provide the following information to request a new department.

- Reason for New Department
- New Department Name (maximum of 30 characters)
- Short Department Name (maximum of 10 characters)
- Department Abbreviation (maximum of 3 characters)
- ISU Department Long Name (maximum of 45 characters)
- Building where Mail is Delivered

Department Change

This form is used to request a new department, change the name of a department, or delete a department. For questions regarding this form, contact Amanda Hendrix at amhendr@ilstu.edu.

For help with this form, view the Department Change Request Form Instructions.

Effective Date of Change:

◉ Add New Department   ○ Change Department Name   ○ Delete Department

Department Information

Reason for New Department:	
Department Name:	* Max 30 Char
Short Department Name:	* Max 10 Char
Department Abbreviation:	* Max 3 Char
ISU Department Long Name:	Max 45 Char
Building Where Mail is Delivered:	Max 25 Char

- Mail code
  - Department will use an existing mail code
    - Enter current mail code
  - A new mail code is requested (pending approval by Mail Services)
    - Enter Proposed Department Mailing Title

Mail Code: ☑ Department will use an existing mail code   ☐ A new mail code is requested (Pending Approval)

Mail Code: _____

Mail Code: ☐ Department will use an existing mail code   ☑ A new mail code is requested (Pending Approval)
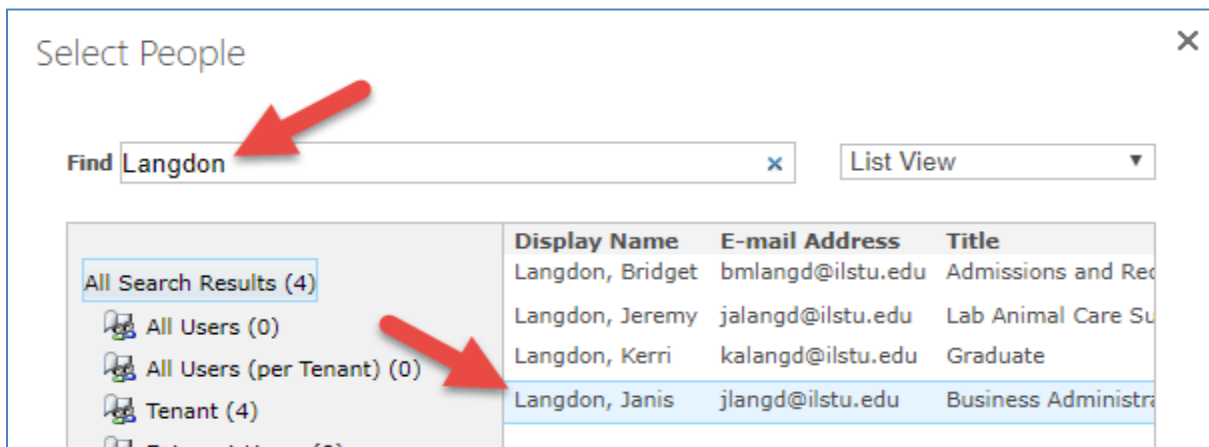
Proposed Department Mailing Title: _____

NEW GR ACCOUNT NEEDED

Request a GR account for the new department by clicking the "New GR Account Needed" checkbox and providing the following information. (At submission a New GR Account request form will be created and will move through the that approval process.)

Budget Officer (required): Type name of employee who will act as the Budget Officer for the new agency account being requested. Type name into field (Last name, First name) or use one of the "lookups" as follows…

Budget Officer:		
Budget Officer UID:		

1. Enter the employee's ULID and click the ⚏ icon, or

2. Click on the ⚏ icon and do the following:
   o Type the employee's last name in the "Find" field and click "Enter"
   o Select the appropriate employee from the list returned
   o Click "OK"

Budget Officer UID: Type the Budget Officer's UID (begins with "8", must be nine digits)

Title of Account: Provide the title for the new account. This is limited to 27 characters.

Account Purpose: Provide a brief but thorough description of how the account will be utilized.

How Budget Established: Is the budget for the new account being transferred from an existing GR account or will the account be centrally funded? Select appropriate response.

Expenditures: List the types of expenditures that will be posted to the new account (i.e. personnel (list employee classes), travel, supplies, conference registration, etc.).

Object Codes Needed: List the expenditure object codes needed (i.e. 991120 – Personnel, 991200 – Contractual, 991300 – Commodities, etc.).

Title of Account:	New GR Account
Account Purpose:	Brief, thorough description of account use
How Budget is Established:	Transfer from Existing Account ⌄
Expenditures:	AP, CS Exempt, Contractual, Commodities
Object Codes Needed:	991120, 991200, 991300

Additional Comments: Provide any additional information that will be helpful in the decision to approve the new account request.

Change Department Name

DEPARTMENT INFORMATION

Provide the following information to request a department name change.

- Current Department Name – select from drop-down list
- PeopleSoft Department Number – auto-populated based on Current Department Name selected
- New Department Name (maximum 30 characters)
- Reason for Change
- Department Abbreviation (maximum 3 characters)
- Short Department Name (maximum 10 characters)
- ISU Department Long Name (maximum 45 characters)
- Mailing Code
- Is Change to delivery building/mailing title needed? (checkbox)
    - Building where mail is delivered
    - Proposed department mailing title (maximum 25 characters)

Department Change

Effective Date of Change:

○ Add New Department   ⦿ Change Department Name   ○ Delete Department

Department Information

Current Department Name: * ▾

PeopleSoft Department Number:

New Department Name: Max 30 Char

Reason for Change:

Department Abbreviation: Max 3 Char

Short Department Name: Max 10 Char

ISU Department Long Name: Max 45 Char

Mailing Code:

Is change to delivery building/mailing title needed? ☑

Building where mail is delivered:

Proposed department mailing title: Max 25 Char

Delete Department

DEPARTMENT INFORMATION

Provide the following information to request the deletion of a department.

- Current Department Name - select from drop-down list
- PeopleSoft Department Number – auto-populated based on Current Department Name selected
- Reason for Deletion

Department Change

Effective Date of Change:

○ Add New Department   ○ Change Department Name   ⦿ Delete Department

Department Information

Current Department Name: * ▾

PeopleSoft Department Number:

Reason for Deletion:

ADDITIONAL COMMENTS

Provide additional comments related to the department request, as needed.

Additional Comments

AUTHORIZATION

Department Administrator/Director:

Authorization	① ②
Department Administrator/Director:	Hendrix, Amanda;
	Person To Provide Next Approval

3. Enter the Department Administrator/Director's ULID and click the ⧉ icon, or
4. Type the Department Administrator/Director's name as "Last name, First name", or

5. Click on the ⧉ icon and do the following:
   - Type the employee's last name in the "Find" field and click "Enter"
   - Select the appropriate employee from the list returned
   - Click "OK"

Select People

Find Hendrix ✕   List View ▼

	Display Name	E-mail Address	Title
All Search Results (8)	Hendrix, Ben	bhendr5@ilstu.edu	IT Support Ass
All Users (0)	Hendrix, Taylor	tnhendr@ilstu.edu	
All Users (per Tenant) (0)	Hendrix, Dominic	djhend3@ilstu.edu	Junior
Tenant (8)	Hendrix, Alaina	ajhend2@ilstu.edu	Freshman
Extranet Users (0)	Hendrix, Joe	jkhendr3@ilstu.edu	Business Admi
Federated Directory (0)	Hendrix, Amanda	amhendr@ilstu.edu	University Bud

☑ I certify that the information above is accurate and I am
authorized to submit this request for review/approval.

X *Langdon, Janis*

Submit

Save: If you would like to leave the form and come back to it later for completion and submission, click the "Save" button.

Submit: Once the form has been completed, check the "I certify that the information above…" box. This will make the "Submit" button available for use.

The request is sent for approval by the Department Administrator/Director.

Subsequent approvals by the VP/Pres, VP of Finance and Planning, and Budget Office Director must also be provided. The request will be forwarded for each subsequent approval.

Once the necessary approvals have been submitted, the request will be processed by the Budget Office Director.

Once the request is processed, the original submitter will receive an email to indicate that the request has been completed.

REQUIRED EDITS AFTER SUBMISSION

If any of the approvers determine that the request cannot be processed as submitted, they will "reject" the submission. Comments regarding the necessary edits can be provided and will be included in the "audit trail" at the bottom of the form. The request is sent back to the original submitter for correction/re-submission or cancellation.

The original submitter will receive a system-generated email indicating the request has been rejected. Using the link in the email, open the My Budget Office Forms Dashboard. The rejected request will be listed in the "Pending My Approval" section. Click the "edit" symbol for that request to re-open the form.

To re-submit:

- Enter necessary edits.
- Re-submit the request by once again selecting "I certify that I have the authority…" and click the "Submit" button.
- The request will move through the approval process again. Once all approvals have been provided, the request will be processed.

To cancel:

- If the request is no longer needed, you may cancel it. Select the appropriate checkbox and click the "Submit" button. The request will no longer be processed.

APPROVALS

Once the request has been completed and submitted by the original submitter, it moves through the approval process. The request is forwarded for review and approval by the following:

- Department Administrator/Director
- VP/Pres
- VP of Finance and Planning

Approvals are provided by doing the following.

- Each approver, in succession, receives a system-generated email indicating a Department Change Request has been submitted for their approval.
- Click the "My Budget Office Forms Dashboard" link in the email. The request will be listed under the "Pending My Approval" section. Click the "edit" symbol to open the form for review.
- Review the submitted request.
  - If edits are required, click the "This request cannot be processed as shown above..." checkbox. An explanation should be provided. This information will be viewable by all who have access to the form. Click "Submit".
    A system-generated email will be sent to the original submitter of the request. They will open the form and enter the necessary edits and then re-submit the form for approval or cancel the request if it is no longer needed.
  - To approve the request as it's been submitted, click the "I approve…" checkbox. Click "Submit".

☐ I approve of this new Department request. | ☐ This request cannot be processed as shown above. This will send the request back to the form originator for modification.

Once the request has been approved by each of those listed above it goes to the Budget Director for final review/approval and processing. A system-generated email will be sent to the original submitter to indicate the request has been completed.

QUESTIONS/ASSISTANCE

If you need assistance or have questions about completing the Department Change Request Form please contact the University Budget Office via UniversityBudgetOffice@ilstu.edu or by phone at 438-2143.