

Reorganization Checklist

This checklist outlines activities that need to be done when changes are made to orgs, project codes and/or business units. Not all items below will apply to every change. This checklist is meant as a guideline, but area budget administrators and department/division managers should use their best judgement to determine what activities are applicable to their specific situation, and if other items/tasks other than those outlines below are necessary.

Instances:

Complete division/department reorganization (example: University Relations becoming University Advancement)

When there are changes to a project code and/or a new code is created (example: creating a new incentive program)

When an org is created or changed (example: moving a graduate program from the parent org to their own org)

When a project code is moved to a different org (example: see above)

When an org/department is moved to a different division (example: HR being moved from the President's Office to University Operations)

To be Completed by:	Item/Task (if/when applicable)	Complete via:
Area Budget Administrator	Track both the old & new set of budgets to ensure expenses are posting to the updated Org/Project	Noetix
Area Budget Administrator	Update templates for Journal Entries, Deposits and A/P	Excel templates
Finance Office	Update Key Members & Authorized Signers in Oracle for each project	Area Budget Administrator to submit an Unrestricted Account Request/Change Form to the Finance Office
Finance Office	Submit department name changes for Oracle & Hyperion	Area Budget Administrator to submit an Unrestricted Account Request/Change Form to the Finance Office
Division/Department/School representative	Submit changes for the USD website	Web request: http://www.sandiego.edu/its/web
Division/Department/School representative	Submit changes for building signage & interior signage	Contact the Office of Planning Design and Construction in Facilities Management
Area Budget Administrator	Order new POETS stamps	
Division/Department/School representative	Communicate with Telecommunications to update extensions & the campus directory	Directory Change form
Division/Department/School representative and/or Area Budget Administrator	Notify any outside vendors of changes	
All dept. personnel	All department personnel should update voice mails, email signatures, name tags & business cards with new dept. title	
	Change POETS strings for charges/automatic expenses:	
Area Budget Administrator	Salaries for all applicable personnel	Dept Action Form (DAF, via Oracle)
Area Budget Administrator	Mail Center postage recharges/metered mail barcode sheets	Email to Mail Center Administrator
Area Budget Administrator	Telecommunications phone recharges	Email to Telecommunications
Area Budget Administrator	One Cards, AmEx cards, any other credit card affiliations	Area Budget Administrator to notify the Corporate Card Administrator
Area Budget Administrator	Print Shop copier recharges/copy codes	Email to Print Shop Administrator
Area Budget Administrator	Any blanket POs	
	Update G/L Information:	
Finance Office	All Banner codes and other items associated with correctly routing revenue/expenses	
Finance Office	Item code(s) and Event code(s) in Cash Net	Area Budget Administrator to notify the Finance Office