

Reorganizations - Department Name Changes - New Budget Administration/Management Responsibilities

Has your office experienced a reorganization, department name change and/or personnel job responsibilities changes in the last couple of years? Is your office going to be experiencing these in the near future? If so, there are some critically important tasks that need to be addressed.

Reorganizations:

1. Do employee's salary budgets need to be moved to a new FOAP? If so, this information needs to be given to the **Shawn Schuler, ML 4524** by May 15 of each year to be effective for June 1. Changing the FOAP for an employee's salary/wages/benefits will only occur at the beginning of the new fiscal year. FOAP's are not changed for salary and benefits during the fiscal year due to the complexity of the process and coordinating the Finance System and Human Resource System.

2. Have positions been created either by restructuring existing positions or by creating totally new positions and you are ready to begin the hiring process?

The Position Action Form (PAF) must be completed accurately with all necessary information. Source of funds for new positions must be identified on the form and the PAF should be accompanied with a budget revision, if necessary, to move funding to the correct FOAP where salary and benefits will be expensed. If a position is created through restructuring an existing position, this information should be included in the comments on the PAF.

3. Do student employment or graduate assistant expenses and budgets need to be moved to different orgs?

Contact [Judy Brown](#) (x-4880) in the [Career Services Center](#).

4. Were new departments created?

Will a new org for operating expenses or payroll be needed? Request the creation of a new org by completing the [Org Action Form](#) found on the [Financial Planning and Budgeting Office website](#) and sending it to **Shawn Schuler (ML - 4524)**.

5. For new orgs, two forms need to be completed once the org is created.

[Signature Authorization Form](#) to be completed one per org with only those individuals who are permitted to spend the funds in the org. When completed, send this to **Dan Salazo (ML-4531)** in the [Controller's Office](#).

[Administrative Data Access Form](#) for each individual who will need to view the org in the Finance System.

6. Have employees been given new responsibilities pertaining to budgets?

See New Budget Administration/Management Responsibilities below.

7. Another consideration - employees who are no longer responsible for budgets:

The [Administrative Data Access Form](#) should be completed to remove their finance system access. New [Signature Authorization Forms](#) should be completed for respective funds and orgs and sent to the Controller's Office.

8. Have Positions been reclassified?

The Position Action Form must be completed and forwarded to the offices as described on the form.

9. Have employee's supervisors changed?

Contact [Human Resources](#).

10. Has your physical location changed?

Contact [Human Resources](#).

11. Has your mail location changed?

Contact [Human Resources](#).

12. Has your phone extension changed?

Contact [Human Resources](#).

13. Contact [Human Resources](#) for information on the hiring and paying process for employees.

14. When new orgs/funds are created, you need to make sure you are using the correct FOAP information with University service departments. If new accounts need to be set up with certain service departments, contact them prior to using their services:

<u>Service</u>	<u>Contact Department</u>
On-line office supply vendor:	Purchasing Department- x- 3676
Long Distance charges:	Telecommunications – x-3211

Department Name Changes:

16. When a department changes its name it may be necessary to change the name of the operating org associated with the department. In order to change the name of an org the Chair/Director of the Department should complete the [Org Action Form](#) and send it to **Shawn Schuler, ML 4524**.

17. When Org have their names changed the following two forms need to be completed.

[Signature Authorization Form](#) to be completed one per org with only those individuals who are permitted to spend the funds in the org. [Administrative Data Access Form](#) for each individual who will need to view the org in the Finance System.

New Budget Administration/Management Responsibilities

There are a number of steps which need to be taken upon receiving responsibility for Budget Administration.

1. [Signature Authorization Form](#) to be completed one per org or fund with only those individuals who are permitted to spend the funds in the org/fund to sign the form. Even those who have signed the form but haven't had any changes to their signature authority must also resign the form.
2. If you need help determining the list of funds/orgs in your area you can call **Shawn Schuler** in the Financial Planning and Budgeting Office at **X-3729** or email schulers@xavier.edu.
3. An [Administrative Data Access Form](#) will need to be completed for each new employee or those with new Budget administration duties who need to view orgs/funds in the Finance Administrative System. You can get this form through the portal. Tab on the *Employee Services* section. In the bottom right corner, you will see a section marked *Forms*. You will find the [Administrative Data Access Form](#) in this section. Upon completion, send it via interoffice mail to the **Controller Office, ML 4531**
4. New employees or those with new Budget Administration duties will need training in the Financial Administrative System. Call **Rick Lopez (x-4837)** or visit the [Finance Self-Service Training Website](#) to schedule an appointment for Finance System Training. You should also begin to familiarize yourself with the [Financial Planning and Budgeting Office Website](#) and the [Controller's Website](#).