

Creating and Updating Departments

INTRODUCTION

The <u>Activity Number & Maintenance Department Request eForm</u> consolidates the HR and financial process of creating and updating departments and activity numbers.

Form Location:

NavBar>Navigator>Main Menu>Self Service>Employee Resources>Employee Forms>Compensation Forms



Who completes the form?

The HR Liaison/Finance Manager or any other individual within the unit is able to complete the form. If any other individual besides the HR Liaison completes the form, the HR Liaison must be informed in order to ensure the integrity of the data. All changes pertaining to the reports-to, roll up department, department description, department manager, HR Contact information must be current. <u>The Activity Number & Maintenance Department Request Form</u> is used to initiate the following requests:

Division of Busines	FLORIDA INTERNATIONAL UNIVERSITY ss and Finance		
Requested By:	Ana Pineda	Contact Phone Number:	305-348-6094
Email Address:	pinedaa@fiu.edu		
Select a transaction	m to proceed: nt Request imber Request anges		

a. **New Department Request**: A department that does not exist in the university. A Department is a nine-digit number that identifies an organizational unit. In order for a department to be created; it must meet the following criteria:

- i. Serve a distinct function or discipline
- ii. The Department must have a manager with subordinates
- iii. The Department must also have a budget

b. New Activity Number Request

c. **Department Changes**: This request is when changes to an existing department are needed.

The changes can include, but is not limited to the following:

- Department Description
- Department Manager
- Primary & Secondary Expense Managers
- Primary & Secondary HR Contacts
- Location

CREATING A NEW DEPARTMENT

Step 1: Navigate to the Activity Number & Department Maintenance Request eForm in PantherSoft HR.

NavBar>Navigator>Main Menu>Self Service>Employee Resources>Employee Forms>Compensation Forms



Academic Affairs Forms
Benefits Forms
Compensation Forms
⇒ <u>Activity Number & Department Maintenance Request eForm</u>
⇒ <u>Administrative/Staff Change In Status Form</u>
Employee Labor Relations Forms
Employee Records Forms
Equal Opportunity Desgrams & Diversity Forme
Equal Opportunity Programs & Diversity Forms
Payroll Forms

Step 2: Choose New Department Request

Division of Busines	LORIDA NTERNATIONAL INIVERSITY is and Finance/Division of Hu	uman Resources	
Requested By:	Roary	Contact Phone Number:	305-348-4996
Email Address:	hrtstuser@fiu.edu		
Select a transaction New Departme New Activity N Department Ch 	to proceed: nt Request umber Request langes		
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Step 3: Complete the fields

The requestor will need to complete all the fields. If the requestor is NOT the HR Liaison, the HR Liaison must be made aware of the request.

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- a) <u>Parent Department</u>: The department to which the new department will report.
- b) <u>Proposed New Department</u>: The requestor enters the 9-digit department and its description. The description of the department restricted to 31 characters and should not contain special characters such as periods (.), commas (,), dashes (-) or ampersand signs (&). The Department Budget Manager assigns the 9-digit department.
- c) <u>Location</u>: The location/primary building of the department.
- d) <u>Roll Up Departments</u>: Any departments that this department will oversee.
- e) <u>Financial Tree</u>: The requestor assigns the financial tree node.
- f) <u>Department Manager</u>: The department head/manager. This is important as it will affect the workflow approval process of the Electronic Position Request Form (ePRF).
- g) <u>Primary & Secondary Expense Manager</u>: The individuals that approve financial expenses. Compensation Administration enters the expense managers in the system.
- h) Primary & Secondary HR Contacts: The HR Liaisons for the department.
- i) <u>Function of New Department</u>: Requestor must complete this area as this is the justification for creating a new department.
- j) New Activity Number Description
- k) <u>Site</u>: Select the appropriate location from the drop-down menu.
- I) <u>Funding Group</u>: Select the appropriate funding group.
- m) <u>Purpose of new Activity Number</u>: Enter a brief justification for requesting a new activity number.

Step 4: Check the "I certify" section, and press Submit. The request will go through an approval process.

Approval Workflow Process

Expense Manager ---> Business Unit Head ---> Academic Affairs (if applicable) ---> Compensation ---> Funding Source Approver --->Accounting and Reporting --->FSSS

PROCESS OF SUBMITTING DEPARTMENT CHANGES

Step 1: Navigate to the Activity Number & Department Maintenance Request eForm in PantherSoft HR.

NavBar>Navigator>Main Menu>Self Service>Employee Resources>Employee Forms>Compensation Forms



Academic Affairs Forms				
Benefits Forms				
Compensation Forms				
→ <u>Activity Number & Department Maintenance Request eForm</u>				
⇒ <u>Administrative/Staff Change In Status Form</u>				
Employee Labor Relations Forms				
Employee Records Forms				
Equal Opportunity Programs & Diversity Forms				
Payroll Forms				
Recruitment Forms				

Step 2: Choose Department Changes

FLORIDA INTERNATIONAL UNIVERSITY Division of Business and Finance/Division of Human Resources					
Requested By: Email Address:		Contact Phone Number:			
Select a transaction to New Departmer New Activity No Department Ch Start	o proceed: nt Request umber Request anges				

Step 3: Complete only the fields that require changes and submit one form for each department where a change is necessary. Check the "I certify" section, and press Submit.

		HR Department Char	age	November 30, 2018
Requested By:	Roary			
Effective Date:	11/30/2018	Existing Department		Department Description
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Proposed Desci	ription:	Proposed Description	Location:	V.
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Please select th	e area			
that the new de under:	ptID's budget is	Select	V	
	Poll up Departme	ate		
(Departments	that report to the	new Department):		
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Secondary Expe	ense Manager:			
Panther ID	Manade	r Name		
Primary HR Con	tact:			
		t Name.		
Secondary HR C	Contact:			
	Contac	t Name		
Other HR Conta	ct			
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Add Rows Dek	ete Rows			
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Comments:				
View Depa	rtment Request	's History		
I certify the	at the above in	formation is correct.		
		Produces II. 4 II. 4		
		Dusiness Unit Head		
		Submit Form Clear F	Form	

Step 4: Once the form is submitted, approvers will be notified to approve and the requester will receive an email with the form link to track the status (see sample email below).



Dear Requester,

Your Department Change Request has been received and will be forwarded to:

Business Unit Head ---> Academic Affairs (if applicable) ---> Compensation ---> FSSS (if applicable).

You will receive a notification when the process is complete; however, you may review the status of the request via the link below at any time.

Click here to view the e-form

For questions about the HR Department Change, please contact Compensation Administration at <u>empadmin@fu.edu</u> or by calling 305-348-4996.

Thank you for your time and attention.

Department: XXXXXXXXX Department Description: <Department Name> Form ID: 321YY3C_008Q8ZFJQ000SRR