

Creating New and Updating Existing Departments

INTRODUCTION

The Activity Number & Department Maintenance Request eForm consolidates the HR and financial processes of creating and updating departments & activity numbers.

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 New Department Request or Department Changes, the HR Liaison must be informed in order to ensure the integrity of the data.

Form Location

PantherSoft HR Main Menu>Self Service>Employee Resources>Employee Forms>Compensation Forms

Favorites | **Main Menu** > **Self Service** > **Employee Resources** > **Employee Forms**

Academic Affairs Form s
Benefits Form s
Com pensation Form s
⇒ Activity Num ber & Department Maintenance Request eForm
⇒ Additional Compensation Request
⇒ Administrative/Staff Change In Status Form
Em ployee Labor Relations Form s
Em ployee Records Form s
Equal Opportunity Program s & Diversity Form s
Payroll Form s
Recruitment Form s

The Activity Number & Maintenance Department Request Form is used to initiate the following requests:



Requested By:

Contact Phone Number:

Email Address:

Select a transaction to proceed:

- New Department Request
- New Activity Number Request
- Department Changes

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. Have a manager with subordinates
- iii. Have a budget

New Activity Number Request: See the [Office of the Controller forms website](#) for instructions.

Department Changes: This request is when changes to an existing department are needed. The changes can include, but are not limited to the following:

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

PROCESS OF CREATING A NEW DEPARTMENT

Step 1: Locate the “Activity Number & Department Maintenance Request eForm” within PantherSoft HR under Self-Service>Employee Resources>Employee Forms>Compensation Forms.



FIU

Favorites | Main Menu > Self Service > Employee Resources > Employee Forms

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

Step 2: Choose “New Department Request.”



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Division of Business and Finance/Division of Human Resources

Requested By: Contact Phone Number:

Email Address:

Select a transaction to proceed:

- New Department Request**
- New Activity Number Request
- Department Changes

Step 3: Complete the fields.

- **Note:** The requester will need to complete all the fields. If the requester is **NOT** the HR Liaison, the HR Liaison must be informed of the request.

New Department Request Form HR Department Request December 14, 2016

Requested By:
 Effective Date:

Parent Department: Business Unit:
 Proposed New Department: Location:
 Please select the area that the new deptID's budget is under:

Roll up Departments
 (Departments that report to the new Department):

Department	Department Description
<input type="text"/>	<input type="text"/>

Department Manager:

Primary Expense / Asset Manager:

Secondary Expense Manager:

Primary HR Contact:

Secondary HR Contact:

New Activity Number Request December 14, 2016

Requested By: Contact Phone Number:
 Email Address:

New Activity Number Description:

Department ID: Site:

Funding Group: VP / Executive Area:

CIP
 (AA/DoR only):

Purpose of New Activity Number (be specific):

- a) Parent Department: The department to which the new department will report.
- b) Proposed New Department: The nine-digit department number and description for the new department. The description of the department is restricted to 31 characters and should not contain special characters such as periods (.), commas

(,), dashes (-), or ampersand signs (&). The Department Budget Manager assigns the nine-digit department number.

- c) Location: The building where the department is primarily located.
- d) Roll Up Departments: Any departments that this department will oversee, if any.
- e) Financial Tree: Similar to the Business Unit, the node in the financials tree under which the department falls.
- f) Department Manager: The department head/manager who is authorized to approve HR transactions. Transactions submitted through the Electronic Position Request Form (ePRF) and job offers, among other transactions, will be routed to this individual for approval. This individual may choose to delegate their approval authority so that transactions are routed to someone else for approval.
- g) Primary & Secondary Expense Managers: The individuals that will approve financial expenses in PantherSoft Financials.
- h) Primary & Secondary HR Contacts: The HR contact for the department. This individual will receive notifications when someone is hired into the department, will be granted access to the HR Liaisons SharePoint site, and will be added to the HR Liaisons listserv.
- i) Function of New Department: Explanation of the function the department will serve.
- j) New Activity Number Description: The description should be similar to the description entered in the "Proposed Department" section.
- k) Site: Select the appropriate location from the drop-down menu.
- l) Funding Group: Select the appropriate funding group.
- m) Purpose of new Activity Number: 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.

Workflow Approval 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: Locate the “Activity Number & Department Maintenance Request eForm” within PantherSoft HR under Self-Service>Employee Resources>Employee Forms>Compensation Forms.



The screenshot shows the FIU logo at the top left. Below it is a navigation breadcrumb: Favorites | Main Menu > Self Service > Employee Resources > Employee Forms. A list of form categories is displayed in a blue sidebar:

- Academic Affairs Forms
- Benefits Forms
- Compensation Forms
 - ⇒ **Activity Number & Department Maintenance Request eForm** (highlighted with a red box)
 - ⇒ Additional Compensation Request
 - ⇒ Administrative/Staff Change In Status Form
- Employee Labor Relations Forms
- Employee Records Forms
- Equal Opportunity Programs & Diversity Forms
- Payroll Forms
- Recruitment Forms

Step 2: Choose “Department Changes.”



The screenshot shows the FIU Florida International University logo and the text "FLORIDA INTERNATIONAL UNIVERSITY" and "Division of Business and Finance/Division of Human Resources". The form contains the following fields:

Requested By: Contact Phone Number:

Email Address:

Select a transaction to proceed:

- New Department Request
- New Activity Number Request
- Department Changes** (highlighted with a red box)

(highlighted with a red box)

Step 3: Search for the existing department by entering the nine-digit department number or the description in the “Department Description” field.

The screenshot shows a web form titled "HR Department Change" with a date of "January 4, 2017". The form contains several input fields and dropdown menus. A red rectangular box highlights the "Existing Department" and "Department Description" fields. Other fields include "Requested By" (filled with "Roary"), "Effective Date" (filled with "01/04/2017"), "Reports to Department" (with sub-fields for "Department" and "Department Description"), "Proposed Description", "Business Unit" (dropdown), "Location" (dropdown), and a dropdown for "Please select the area that the new deptID's budget is under".

Step 4: Complete only the fields where changes are required, check the “I certify” section, and press “Submit.”

- **Note:** If this change affects multiple departments, one form must be submitted for each department.

HR Department Change		January 4, 2017	
Requested By:	<input type="text" value="Roary"/>	Effective Date:	<input type="text" value="01/04/2017"/>
Existing Department	<input type="text" value="156000000"/>	<input type="text" value="DHR Administration"/>	
Reports to Department:	<input type="text" value="Roary"/>	Department	<input type="text"/>
Proposed Description:	<input type="text"/>	Department Description	<input type="text"/>
Please select the area that the new deptID's budget is under:	<input type="text"/>	Business Unit:	<input type="text" value="Select..."/>
	<input type="text"/>	Location:	<input type="text" value="Select..."/>
Roll up Departments (Departments that report to the new Department):			
<input type="text"/>			
Default Activity Number: <input type="text"/>			
Department Manager:	<input type="text" value="Panther ID"/>	<input type="text" value="Manager Name"/>	Current: Department Manager's Name
Primary Expense / Asset Manager:	<input type="text" value="Panther ID"/>	<input type="text" value="Manager Name"/>	Current: Primary Expense Manager's Name
Secondary Expense Manager:	<input type="text" value="Panther ID"/>	<input type="text" value="Manager Name"/>	Current: Second Expense Manager's Name
Primary HR Contact:	<input type="text" value="Panther ID"/>	<input type="text" value="Contact Name"/>	Current: Primary HR Contact's Name
Secondary HR Contact:	<input type="text" value="Panther ID"/>	<input type="text" value="Contact Name"/>	Current: Secondary HR Contact's Name
Other HR Contact	<input type="text" value="Panther ID"/>	<input type="text" value="Contact Name"/>	
<input type="button" value="Add Rows"/> <input type="button" value="Delete Rows"/>			
Comments: <input type="text" value="Type in Function..."/>			
<input type="checkbox"/> View Department Request's History			

Step 5: 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 cmpadmin@fiu.edu or by calling 305-348-4996.

Thank you for your time and attention.

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