

SUBJECT: Department Request for Action Form

Complete the Department Request for Action Form to create, modify, or remove a department.



University
of Houston
Clear Lake

DEPARTMENT REQUEST FOR ACTION FORM

Effective Date:

ACTION REQUESTED:

☐ Create New Department

☐ Move Department on DEPTID_ROLLUP tree

☐ Change Department Name

☐ Remove Department from DEPTID_ROLLUP tree

☐ Change Department Manager

1. Enter the date the action will go into effect.
2. Choose the requested action. Include a copy of the tree indicating where the department needs to be categorized under for the following action Requests: Create New Department and Move Department on DEPTID_ROLLUP tree.

Current Dept. ID	<input style="width: 100%;" type="text"/>	Current Dept. Name	<input style="width: 100%;" type="text"/>	Source	<input style="width: 100%;" type="text"/>
New Dept. ID	<input style="width: 100%;" type="text"/>	New Dept. Name	<input style="width: 100%;" type="text"/>	Source	<input style="width: 100%;" type="text"/>
Short Dept Name	<input style="width: 100%;" type="text"/>	EMPL ID	<input style="width: 100%;" type="text"/>		
Dept Manager	<input style="width: 100%;" type="text"/>				
Explanation					

3. Enter the current Department ID and current Name of the Department that is being modified.
4. Do not complete Source. The Budget Office will assign this value.
5. Enter the new Department ID that is being modified. If the Department is being created, the Budget Office will assign the new Dept. ID.
6. Enter the name of the new Department being created or the new name if being modified. This field is 30 characters.
7. Enter an abbreviated version of the department name for the Short Dept Name field. This field is 10 characters long.
8. Enter the Employee ID of the Department Manager.
9. Enter the name of the Department Manager. The format is LASTNAME,FIRSTNAME.
10. Enter an explanation of why the action is being requested.



PeopleSoft General Ledger Documentation

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11. Obtain the signature of the **College / Division Business Administrator** and **Department Manager**.
Type the names and include a date of signature.

DEPARTMENT APPROVALS:

	Signature	Last Name, First	Date
College / Division Business Administrator:	<input type="text"/>	<input type="text"/>	<input type="text"/>
Department Manager:	<input type="text"/>	<input type="text"/>	<input type="text"/>

APPROVALS REQUIRED FOR DEPARTMENT ACTION:

	Signature	Last Name, First	Date
Planning & Budget Approval:	<input type="text"/>	<input type="text"/>	<input type="text"/>
Department Action Completed By:	<input type="text" value="Request sent to HR by:"/>	<input type="text"/>	<input type="text"/>

12. Obtain all signatures indicated and forward to the Budget Office.
13. **BUDGET OFFICE ONLY** - Update the trees within the GL and Budget systems. The Budget Office will update the DEPTID_ROLLUP tree and the DEPTID_BDM trees. Update the necessary trees for the current fiscal year and the future fiscal year if available. Changes made to the department name and department manager are done via the chartfield values. To create a new department is completed by creating the department in chartfield values and then organize new department under proper placeholder department via the tree manager. A department is moved via the tree manager. To inactivate a department, it is moved off of the DEPTID_ROLLUP tree. Date and sign the form to indicate the action was completed. Attach the DEPTID_ROLLUP tree to this form indicating the changes to the tree, and then email Human Resources (HR Peoplesoft) the form along with the attached DEPTID_ROLLUP for the update to the HR tree. The Budget Office will not submit the department request form for changes to the department manager to UH Human Resources. They do monitor these changes, and the changes do not impact their tree.

TREE UPDATE: General Accounting and Budget Department Only

	Updated	Signature	Last Name, First Name	Date
DEPTID_ROLLUP	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
DEPTID_BDM	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Emailed				
DEPT_SECURITY (HR Tree)	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>