Chart of Accounts (COA) Maintenance

DeptID Request - CHANGE

Use this form to request a change to an existing deptID or to reactivate an inactive deptID, or to update authorized approvers.

Refer to Guide: Chart of Accounts (COA)\Chartfields for further information on deptID.

Refer to the COA Department ID Management Document located in the Forms Cabinet for further details pertaining to this form.

CHANGE OR REACTIVATE DEPTID		
DeptID Number		**Change** **Reactivate**
Effective Date (mm/dd/yyyy)		
Change deptID short description (max. 10 characters)	New description	
Change deptID name (max. 30 characters. Refer to the Naming Conventions section in the 'DeptID Management' document)	New name	
Change Long Description (max. 100 characters)	New long description	
Change budget owner	Employee ID	
	Employee name	
	Position name	
Change one-over-one deptID approver	New one-over-one deptID number	
	New one-over-one name and position	
	Confirmation of one-over-one routing	**REQUIRED:** Senior Finance Partner (SFP) has reviewed DEPTID_BUD_OWNER tree to ensure one-over-one approval routing is appropriate (i.e. the budget owner for the one-over-one is not the same as the budget owner for the deptID being changed, and the budget owner for the deptID being changed reports organizationally to the one-over-one)
Department Level Security	New Parent DeptID	

INACTIVATE DEPTID (note: inactivating a deptID will also inactivate speedcodes associated with the deptID)		
DeptID Number		**REQUIRED:** SFP has confirmed that there is no outstanding activity related to the deptID being inactivated.
Effective Date (mm/dd/yyyy)		

CHANGE BUDGET VARIANCE CARRY FORWARD		
DeptID Number		DeptID budget variance carries forward to itself OR DeptID budget variance carries forward to the College, Faculty or VP portfolio

Senior Finance Partner (SFP) Approval

SFP signature is only required if an individual other than the SFP is submitting the form on their behalf. If SFP is emailing the form, signature is not required.

SFP Name	SFP Signature	Date (mm/dd/yyyy)

ROUTING INSTRUCTIONS

SFP emails completed form to fscoarpt@ualberta.ca

Financial Reporting reviews and approves and sends to IST.

The request will be assessed and set up within 10 business days; SFP will be notified if this timing cannot be met.

Signature Form for Information Services and Technology

Authorized approvers are individuals within a faculty/department who are given the authority to:
- Request or remove access to the University's administrative applications for staff in their department.
  This applies to: PeopleSoft Campus Solutions, Finance (including eTRAC and Supply/Net), and HCM
- Manage the CCIDs for staff in their department

Authorized approvers should be University employees; however, Guests and Non-University employees may be authorized approvers where required.

This list of authorized approvers must be signed by the Senior Finance Partner for the specified department IDs.

This signature form is used when authorized approvers are being **changed**.

Signed copies will be retained in IST - Enterprise Applications for signature validation purposes.

Faculty/Dept of:

Insert name of Faculty/Dept and
Department ID

Additional Sub-units/Depts/Institutes for this Faculty/ Dept Please provide both Name and Department ID:

Changes to Authorized Approvers

	Name/Position		**CCID**	**Signature**	CS	Finance	HCM	CCID
1.		Add Remove			☐	☐	☐	☐
2.		Add Remove			☐	☐	☐	☐
3.		Add Remove			☐	☐	☐	☐
4.		Add Remove			☐	☐		☐
5.		Add Remove			☐	☐	☐	
6.		Add Remove			☐	☐	☐	
7.		Add Remove						
8.		Add Remove						