

KFS Org Checklist for Document Initiators: Move Org/ Change Reports To Org

✓	Item	Notes
	Review Current Org Structure	Why does the Org need to move? Is this a programmatic change or just to adjust reporting?
	Where is the Org Going?	If it is moving to a different division, does it make sense to create a new Org?
	Review UC Accounts within Orgs	Is the activity different than existing activity in other existing orgs? Will you need new UC accounts when the Org moves?
	Review the Impact to Org Level	Is the Org staying at the same level or moving up or down a level? If it is moving levels, does it need a new number sequences (e.g., 7xxx moving up to 8xxx series)?
	Review Current UCPATH Department Structure	Will you need to update appointments in UCPATH? Or will you need to modify access because of security reasons?
	What Should the Effective Date of the Move be?	Keep in mind timing of change and how it will impact financial reports. Should the wait until a new fiscal year starts?
	KFS Fiscal Officer Initiates Request using Org Document in KFS	Explain the reason for the move in the description. If moving to a different division, mention the authorization for this move (e.g., provost approval).
	Review the Org Name	Should the Org name change because of the move? To keep KFS and UCPATH synchronized, names have to be only 30 characters, because UCPATH only allows 30. Even if the Org will not be in UCPATH, it must be 30.
	If needed, request to add the Org to UCPATH department in document description.	If the Org is not in UCPATH yet, but it needs to be after the move, make the request. If the Org is already in UCPATH, it will be moved to new structure. The Budget Office will forward request for new UCPATH Department to Campus' UCPATH team, and they will submit request to Path Center to update UCPATH.
	Provide Budget Office with Default UCPATH Account	If the default account in UCPATH department is changing, mention the what the account should be in the description. All UCPATH departments need a default account in the event of a payroll error. Units tend to have one account for all their departments. It is not necessarily the same as the default account used in the KFS Org document.
	Submit Org Document for Review	Once submitted, the document will route within the unit, and then it will go to Budget Office for approval. After the Budget Office, Accounting will also approve.
	Create or Move UC Accounts, once the Org is moved	Work with Accounting to create new UC accounts or move existing UC accounts. Note transactional accounts must be at the lowest level in the given Org structure.
	Create or Move KFS Accounts, once the UC Accounts are in the Org	Create new KFS accounts or move existing KFS accounts, after Accounting assigns the UC Accounts. Note transactional accounts must be at the lowest level in the given Org structure.
	Deactivate Accounts and Orgs as Needed	Once the Org has all the accounts needed, consider deactivating other Orgs in the structure that are no longer needed because of move. Also review accounts.