

EXAMPLE FORM

File Code: _____



REQUEST FOR ADDITIONS AND CHANGES TO CHART OF ACCOUNTS ORGANIZATION CODE

Submit completed and signed form to the UCSC Planning & Budget Office.
Proposed new organization codes will be reviewed by P&B and may be subject to change.
FIS Security Administration will inform requestor when new organization code may be utilized.

<input checked="" type="checkbox"/> Change to Existing Organization	<input type="checkbox"/> Addition of New Organization
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Organization Code	<u>444444</u>	Organization Title	<u>BAP/RSCH/SLUGS</u>
Predecessor Organization Code [1]	<u>1234</u>	Predecessor Title	<u>Planning & Budget Office</u>
Service Center Code [2]	<u>ABC</u>	Service Center Name	<u>Apple Business Cats</u>
Effective Date of Addition*	<u>ASAP</u>	Payroll Encumbrance (On/Off)	<u>ON</u>

[1] Where in the Organization Code Hierarchy this org should reside?
InfoView has a complete Chart of Accounts Corporate Reports for viewing or downloading.

[2] A list of Service Center Codes and their associated Org codes can be found on the BAP website (<https://planning.ucsc.edu/budget/coa-fund-tranfers/coa.html>).

Reason for Change

Org 444444 is to be moved from predecessor org 1079 to predecessor org 1234.
The Service Center Code needs to be updated to ABC
Please contact Hannah Vanderlinden with any questions.

* UCPath will not allow the use of a FOAPAL element (such as an org or activity code) if it has an Effective Date in FIS Banner that is later than dates appearing in the UCPath record being entered. Requestor must indicate an Effective Date for new organization codes that will meet their needs with respect to UCPath transactions. If no Effective Date is specified on this form, the 1st of the previous closed month will be used. Effective dates cannot be backdated after the initial creation of an organization.

Requested by:	<u>HANNAH VANDERLINDEN</u>	Ext.	_____	Date:	_____
	Name				
Approved By:	<u>FINANCIAL DIRECTOR</u>	Ext.	_____	Date:	_____
	Signature				
Approved by P&B:	_____	Ext.	_____	Date:	_____
	Signature				

To be completed by Planning & Budget Office

INDEX	_____	ARC	_____	UAS	_____
DISC	_____	NSF	_____	AGC	_____