Future Re-Organization Process Guidelines

The purpose of this document is to outline the process for reorganizations occurring on a University, College, Campus, Administrative Unit, Department level. Reorganizations such as these involve a collaborative effort between the Financial Officers and HR teams within the various units to be successful. While there may be exceptions, for any reorganization that involves changes to people (Sup-Org) and financial changes these processes outline the correct procedure.

Option 1. Future Re-Organization Process (including Sup-Org change and financial changes)

Step 1: Approval of re-organization with HR and unit Management/Leadership

Step 2: Begin re-organization process (includes HR and financial adjustments)

1. Financial Officer (FO) receives information about re-org from unit HR (HRSP/HRC)
2. FO submits a ServiceNow ticket to SIMBA master data team requesting a new business area
3. ServiceNow ticket is updated with new business area number and other supporting information
4. FO creates cost center structure using a template on the SIMBA website
5. FO attaches completed cost center structure to ServiceNow ticket and submits back to SIMBA master data team
6. Cost centers are updated, and SIMBA master data team responds back in ServiceNow ticket with cost center creation complete;
7. FO creates internal order structure using a template on the SIMBA website
8. FO attaches completed internal order structure to ServiceNow ticket and submits back to SIMBA master data team
9. FO notifies Donor Member Services (if applicable) of the new internal orders to update the allocation codes
10. FO completes Endowment Master Data Template (if applicable) and follow instructions on spreadsheet for submission.
11. FO submits forms for new security roles in Workday/I1Q/SAP Concur. For SailPoint I1Q, the FO adds the new roles and removes the old roles.
12. If the reorganization occurs mid-fiscal year and there are posted salary/fringe from previous months that needs to be moved in SIMBA, then the FO does the Labor Distribution (LD) salary distribution first for the previous months before submitting the pay account change via the compensation change form in Workday.
13. HRC completes/reviews the Supervisory Org. Request form (NOTE: If you are completing this step during the Merit process time period, you should wait until after the merit process is completed).
   a. FO works with unit HR to ensure sup org adjustment/compensation change forms are completed. The FO provides the HRC with cost center and pay account information via comp change form.
   b. HRC submits Compensation Change Forms in Neocase for updates in Workday
c. **NOTE:** Ensure Workday roles have been processed before submitting the comp change form.

15. Unit HR receives update(s) from Neocase (Shared Services) that updates have been submitted. (ticket closed out)
16. Data and Onboarding moves employees into appropriate Supervisory Org.
17. Unit HR communicates with FO that Workday updates have been submitted/completed.
18. Process change (in Workday) goes through the approval process which includes Unit HRC, Unit Admin, Budget Admin, FO, and Budget Exec. (over 100,000).
19. Workday notification in WD inbox that the business process has been completed to the roles listed above.
20. Once the compensation change form is complete, Workday will push out position budget amendments for the FOs to complete and submit to correct the position budget account information.
21. FO submits ticket in ServiceNow to remove and add spending authorizations for Shop Onlion (SRM), OPP, and Fleet (ABS1).
22. FO transfers any direct billings if applicable such as Fleet Leases, Copier Management, Phone & Networking, etc...
23. FO updates outstanding commitments such as processing change forms for open POs.
24. FO processes purchasing card transfers through a Request-Update Existing Card in SAP Concur to update the new account information.
25. FO’s in impacted units work together to ensure that assets are transferred (SIMBA - Asset Transfer form)
26. FO or Facilities Coordinator sends email to oppabacus@psu.edu to notify OPP of old and new cost objects if there are projects directly billed to their area.
27. FO updates salary distribution in labor distribution in SIMBA for those on a clearing account for future months.
28. FO transfers any applicable budgeted revenue, budgeted expense, actual revenue, and actual expense.
29. FO submits ServiceNow ticket to deactivate cost centers and internal orders
   a. Only deactivate CC & IOs after the SIMBA team processes the Residual Budget Balance transfers from the prior fiscal year.

**Step 3: FO sends notification that re-org process is completed to other key stakeholders who may need to know any changes in their respective areas.**

- Real Estate/Leasing
- Cost Analysis
- Treasury
- IT
Option 2. Future Re-organization Process (movement of finances only)

Step 1: Approval of re-organization with HR and unit Management/Leadership

Step 2: Begin re-organization process

1. Financial Officer (FO) receives information about re-org from unit HR (HRSP/HRC)
2. FO submits a ServiceNow ticket to SIMBA master data team requesting a new business area
3. ServiceNow ticket is updated with new business area number and other supporting information
4. FO creates cost center structure using a template on the SIMBA website
5. FO attaches completed cost center structure to ServiceNow ticket and submits back to SIMBA master data team
6. Cost centers are updated, and SIMBA master data team responds back in ServiceNow ticket with cost center creation complete;
7. FO creates internal order structure using a template on the SIMBA website
8. FO attaches completed internal order structure to ServiceNow ticket and submits back to SIMBA master data team
9. FO notifies Donor Member Services (if applicable) of the new internal orders to update the allocation codes
10. FO completes Endowment Master Data Template (if applicable) and follow instructions on spreadsheet for submission.
11. FO submits forms for new security roles in Workday/IIQ/SAP Concur. For SailPoint IIQ, the FO adds the new roles and removes the old roles.
12. If the reorganization occurs mid-fiscal year and there are posted salary/fringe from previous months that needs to be moved in SIMBA, then the FO does the Labor Distribution (LD) salary distribution first for the previous months before submitting the pay account change via the compensation change form in Workday.
13. FO works with unit HR to ensure compensation change forms are completed
   a. HRC starts the compensation change form (Neocase)
   b. FO provides HRC cost center and pay account (HRC sends FO comp change form to finish)
14. HRC submits Compensation Change Forms in Neocase for updates in Workday
   NOTE: Ensure Workday roles have been processed before submitting the comp change form.
15. Unit HR receives update(s) from Neocase (Shared Services) that updates have been submitted. (ticket closed out)
16. Unit HR communicates with FO that Workday updates have been submitted/completed.
17. Process change (in Workday) goes through the approval process which includes Unit HRC, Unit Admin, Budget Admin, FO, and Budget Exec. (over 100,000).
18. Workday notification in WD inbox that the business process has been completed to the roles listed above.
18. Once the compensation change form is complete, Workday will push out position budget amendments for the FOs to complete and submit to correct the position budget account information.
19. FO submits ticket in ServiceNow to remove and add spending authorizations for Shop Onlion (SRM), OPP, and Fleet (ABS1).
20. FO transfers any direct billings if applicable such as Fleet Leases, Copier Management, Phone & Networking, etc...
21. FO updates outstanding commitments such as processing change forms for open POs.
22. FO processes purchasing card transfers through a Request-Update Existing Card in SAP Concur to update the new account information.
23. FO’s in impacted units work together to ensure that assets are transferred (SIMBA - Asset Transfer form)
24. FO or Facilities Coordinator sends email to oppabacus@psu.edu to notify OPP of old and new cost objects if there are projects directly billed to their area.
25. FO updates salary distribution in labor distribution in SIMBA for those on a clearing account for future months.
26. FO transfers any applicable budgeted revenue, budgeted expense, actual revenue, and actual expense.
27. FO submits ServiceNow ticket to deactivate cost centers and internal orders.
   a. Only deactivate CC & IOs after the SIMBA team processes the Residual Budget Balance transfers from the prior fiscal year.

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