

**ORGANIZATION CHANGE MANAGEMENT
BANNER ADMINISTRATIVE APPLICATIONS
(ORGANIZATION CODE)**

I. Policy Statement

With the implementation of the integrated Banner administrative systems, department codes (hence forth referred to as Organization codes to reflect Banner Finance terminology) are used extensively in Banner Finance, Advancement, Human Resources, and Payroll. Within the academic areas of Banner, the college and department codes for Banner Student (Admissions, Financial Aid, Registrar's Office, and Student Accounts) are separate, yet tightly interwoven codes, which also reflect the structural design of the organization. Banner data (from all modules) drives University Identity Management. Changes to or the addition of new academic or administrative departments; combining or collapsing departments; and renaming departments or moving departments within the university structure must be carefully evaluated to determine the impact on the many business processes and transactions within these systems. The purpose of this policy is to provide uniform guidance and coordination for the establishment of the Banner Finance Organization codes, an integral element of the University's Chart of Accounts, which define the organization codes used within these administrative applications. For academic units, this policy insures that Banner Student Department codes stay synchronized with Banner Finance Organization codes.

II. Scope

The scope of this policy applies to all Academic and Administrative Units within the University.

III. Policy

All division/department changes should be finalized by January 31 of each year in order to be effective for the new fiscal year which begins on July 1. Academic changes that require notification and respective paperwork submittal to General Administration must be also be finalized by January 31. Changes made at any other time of the year that affect the Banner Organization code will have ramifications across numerous administrative applications that make processing, fiscal management and data analysis for the remainder of the fiscal year extremely difficult. Changes flowing to the academic side of Banner, as a result of organization code changes, must be implemented at the beginning of an academic cycle, which is the building of courses for a particular term. Changes effective for a July 1 fiscal year (Finance) would become effective the Fall term (Student), depending upon the scope and complexity of the change.

An Organization Restructuring Committee (ORC) is charged with responsibility to analyze the approved re-organization plan and prepare an action plan and corresponding timeframe to accomplish the system changes necessary to implement the business reorganization. The ORC will be comprised of the following:

Associate Vice Chancellor for Financial Services

Director of Human Resources
University Registrar
University Controller
Director of IT Applications and Data Management
Head of Restructuring Unit

Should a college or division find it necessary to reorganize mid-year it must consult with the ORC and seek approval of the Executive Council (and GA as appropriate) prior to announcing any restructuring. If a mid-year reorganization is approved, the ORC will develop an appropriate implementation plan based on the size, scope and timing of the approved reorganization. Given the complex nature of organization data, units should not expect the reorganization to be reflected in Banner Finance until the start of the next fiscal year or in Banner Student until the start of the next academic year.

IV. Procedures

A. All Academic and Administrative Units must adhere to the following procedures when requesting these types of changes to divisions, colleges or departments:

1. Adding a new department, college, or division
2. Combining or Collapsing
3. Moving a department, college, or division within the University
4. Renaming a Department

Simple changes such as reassigning an employee from one department to another that does not include a restructuring change listed above are outside the scope of this policy. Formal changes to department, division, or college names must have final approval by the Executive Council.

B. Structural Definitions

1. Finance: An Organization Chart must be prepared and submitted showing the placement of the new or changed department in the division, the department/unit head, and all the positions/employees/faculty reporting to the new department.
2. Student: A structural crosswalk must be provided indicating organization changes for ownership of courses, faculty, and student programs within the colleges and departments. The crosswalk should indicate the existing/current information mapped to the new/changed information.

C. ORC Requirements

1. A thirty or less character version of the name should be provided to the office of the Associate Vice Chancellor for Financial Services (AVC). The change will be forwarded to the Controller for entry to FTVORGN. The department name entered in FTVORGN is the name used in all

- reporting from the Banner Finance system. The Registrar's Office will determine if additional values are needed on the STVROLL and STVDEPT tables. Changes to the academic tables will occur where feasible/possible (due to restrictions in academic history).
2. Name changes must be requested when there is substantive rationale for change, not solely for aesthetic purposes.
- D. After the new changes have been approved by the Executive Council, a copy of the approved information should be forwarded to the Associate Vice Chancellor for Financial Services, the Registrar, and Director of IT Applications and Data Management.
- E. The AVC will convene the Organization Restructuring Committee. This should be done by April 1 in order to have Banner set up to handle the new/moved/changed Finance structure by July 1. The Banner Organization Restructuring Committee will be available throughout the month of April each year, and other times as requested. Changes to the academic data would be effective the following spring term.
- F. The ORC will be joint-chaired by the AVC's and Registrar's Offices and will have representatives from the following departments: Controller's Office, Budget and Human Resources, Student and IT (Identity Management).
1. The Controller's Office will review the current Chart of Accounts and will determine the timing and placement of the new or moved ORGN code.
 2. The Registrar's Office will review the changes and determine the timing and placement of changes required by the new organization structure.
 3. The Budget Office will assist departments in generating PAF's to move positions to support the new/changed organization.
 4. Human Resources will work with departments to determine if changes need to be made to current tables. HR will request completed supervisor change forms to change supervisor position numbers on the Banner position table.
 5. IT maintains security for Banner users. The committee will work with the departments to reset access as needed for functional areas affected by organization changes.
 6. IT will evaluate Identity Management groups and roles, in conjunction with the committee, to determine if other changes are necessary for these processes.