

## Departmental Change Request

The purpose of this document is to provide instructions on what to do to request departmental changes to the **Chart Account Organizational Hierarchy** to:

- **Move** a Department
- **Add** a New Department
- **Rename** a Department
- **Reactivate** a Department
- **Inactivate** a Department
- **Update** Chart of Account Segments

To make changes to the Chart Account Organizational Hierarchy you must create a ServiceNow **Chart of Accounts Change Request** ticket with Financial & Accounting Services.

### Departmental Change Request Process

Departmental Changes to the Chart Account Organizational Hierarchy have an impact on various systems, therefore the process starts with the required approval from the Vice Chancellor. Once VC approval is obtained, a Service Now Chart of Accounts Change Request ticket must be submitted to the Financial & Accounting Services (F&AS) office. F&AS works with their OIT Oracle partners to update Oracle and Procurement as well as create all additional information that is needed to fulfill the request. After all information and documentation is gathered, it is sent for review to the Payroll Services – HCM team who submits to the UCPath Center requesting the changes to be implemented in the UCPath System.

On average, the entire process can take 30 calendar days. In some isolated cases, the wait time can be greater due to UCPath Center implementing a temporary freeze on requests. In these situations, the average wait times can extend to 45 calendar days.

A Service Now Chart of Accounts Change Request ticket status will be updated to be *Completed* only after all *Tasks* have been completed and closed.

### Accounting Contact Information

General inquiries regarding Financial Control matters can be directed to [financialcontrol@ucmerced.edu](mailto:financialcontrol@ucmerced.edu) all other matters to [accounting@ucmerced.edu](mailto:accounting@ucmerced.edu)

### Step-by Step

Below are the steps to follow on where to find and create a ServiceNow **Chart of Accounts Change Request** ticket with Financial & Accounting Services.

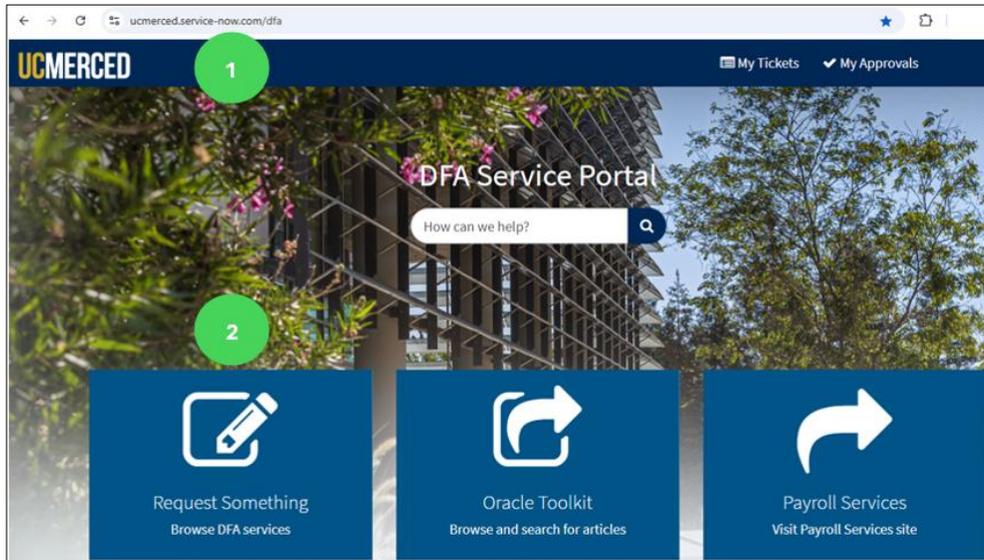
1. In your browser, navigate to the **DFA Service Portal**

**Website Link:** <https://ucmerced.service-now.com/dfa>

**Website Navigation:**

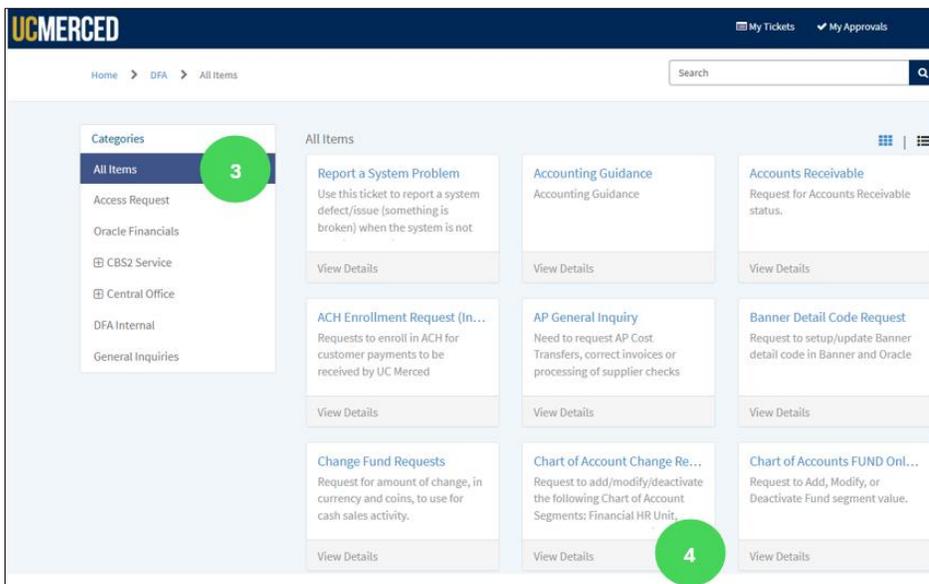
DFA Service Portal > Request Something > All Items > Chart of Account Change Request

2. Click **Request Something**



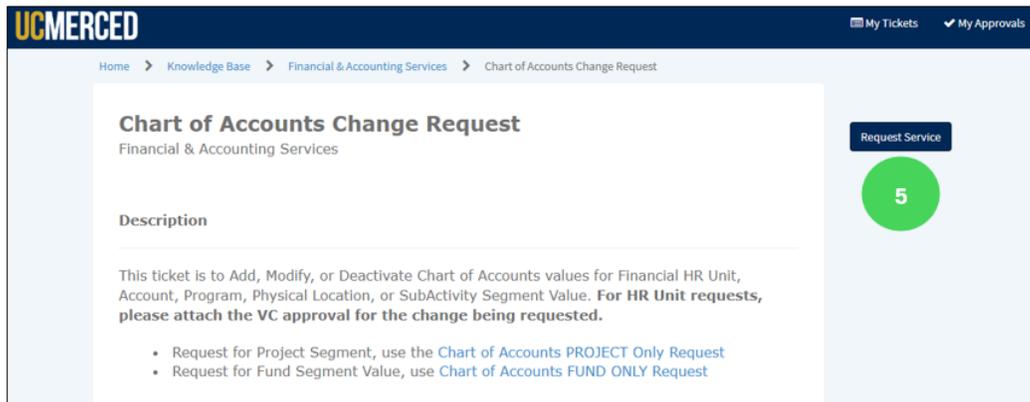
3. Click **All Items**

4. Click **Chart of Accounts Change Request**



5. Click **Request Service**

- a. **For HR Unit requests, VC approval for the change being requested must be attached to the request.**



6. Complete the form and click **Submit Request**

The screenshot shows the 'Chart of Account Change Request' form. A green circle with the number '6' is overlaid on the 'Submit Request' button. The form includes sections for 'Requestor Information' (Requested by, Phone Number, On Behalf of, Department, Email, Supervisor) and 'Request Details' (Short Description, Description, Change Type, Segment Type). There are also fields for 'Are there any related request?' and 'Justification'. A 'Submit Request' button is at the top right. A 'Required Information' section on the right lists 'Request Information', 'Change Type', and 'Segment Type'.