

# **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 <u>financialcontrol@ucmerced.edu</u> all other matters to <u>accounting@ucmerced.edu</u>

## **Step-by Step**

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

UC Merced Payroll Services



1. In your browser, navigate to the DFA Service Portal Website Link: <u>https://ucmerced.service-now.com/dfa</u>

#### 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

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DFA Internal General Inquiries	ACH Enrollment Request (In Requests to enroll in ACH for customer payments to be received by UC Merced	AP General Inquiry Need to request AP Cost Transfers, correct invoices or processing of supplier checks	Banner Detail Code Request Request to setup/update Banner detail code in Banner and Oracle
	View Details	View Details	View Details
	Change Fund Requests Request for amount of change, in currency and coins, to use for cash sales activity.	Chart of Account Change Re Request to add/modify/deactivate the following Chart of Account Segments: Financial HR Unit.	Chart of Accounts FUND Onl Request to Add, Modify, or Deactivate Fund segment value,
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### 5. Click Request Service

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

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	Home > Knowledge Base > Financial & Accounting Services > Chart of Accounts Change Request		
	Chart of Accounts Change Request Financial & Accounting Services	Request Servic	e
	Description		
	<ul> <li>This ticket is to Add, Modify, or Deactivate Chart of Accounts values for Financial HR Unit, Account, Program, Physical Location, or SubActivity Segment Value. For HR Unit requests, please attach the VC approval for the change being requested.</li> <li>Request for Project Segment, use the Chart of Accounts PROJECT Only Request</li> <li>Request for Fund Segment Value, use Chart of Accounts FUND ONLY Request</li> </ul>		

# 6. Complete the form and click Submit Request

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