



# Department Administrative Policy and Procedure

**Subject: Process for Adding an Organization**

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## **I. PURPOSE**

To outline the process of requesting an additional Organization (Org) value for use in the University's chart of accounts (COA).

## **II. DEFINITIONS**

An Organization segment refers to the department or unit (UW Accounting Office, Mathematics Department) where the transaction originates. An Organization represents a unit where Human Resources can identify staff, performance reviews can take place, and business is transacted.

## **III. POLICY**

To be included in the budget development process and the WyoCloud Planning & Budgeting system, requests for new organizations, programs and/or activity values need to be submitted by January 15 of the prior fiscal year. For instance, for values to be considered for the FY21 budget period, requests need to be submitted by January 15, 2020.

The process of requesting an Organization begins with the Budget Office. The entity requesting an Organization must email the Budget Office with the request at [budgetoffice@uwyo.edu](mailto:budgetoffice@uwyo.edu).

- a. The email must include:
  - i. Brief overview of why a new Organization is being requested
  - ii. Requested Organization title
  - iii. Subdivision under which the requested Organization will be structured
  - iv. Number of Positions in requested Organization and what Organization/s they are coming from
  - v. Associated WyoCloud financial string

The request for an Organization will be reviewed by the Budget Office and a recommendation will be forwarded to the University Controller.

After the Controller reviews the COA, the Controller will make recommendations and provide all information to the Associate Vice President of Financial Affairs.

The Associate Vice President of Financial Affairs will determine if the COA is approved or not.

- A. If approved: The Associate Vice President of Financial Affairs will email the WyoCloud Business Analyst with approval.
- B. Not Approved: The Associate Vice President of Financial Affairs will email the requestor and provide the decision.

Once approved, the WyoCloud Business Analysts will upload all required information into the Planning and Budgeting system before the spring budgeting season begins. The organization will then be updated in the Financial Management system on July 1, so that the budget for the new organization (which starts on the fiscal year) will correspond to the new organization in Financial Management.

Financial Affairs will also work closely with Human Resources, as any new organization changes must also correspond with department changes within Human Resources and HCM. Individual requestors will be responsible for following all Human Resources policies for moving individuals within organizations and any associated line manager changes.

**Responsible Division/Unit: Financial Affairs**

**Approved: 8-7-19**