

University of Pennsylvania

Request to Create/Change ORGANIZATION (ORG)

_____ **Add New ORG**
fill in all sections

_____ **Change Existing ORG**
ORG#, Name, & Description

_____ **Disable Existing ORG**
ORG # & Description

ORG #: _____ Parent ORG#: _____ ORG SHORT NAME: _____
(15 characters, ALL CAPS)

Organization Name: _____
(60 characters, mixed case, but Payroll truncates at 26 characters)

ORG Type: (choose only one)

- _____ UN Unit: Academic Department or Administrative Entity
- _____ SU Subunit: Division of a Unit
- _____ SS Sub-subunit: Subdivision of a Subunit for management purposes
(usually used in the case of Service Centers reporting to subunits)

Description of new ORG or the nature of change to existing ORG:

ORG Primary Purpose: (choose only one)

This Purpose will be used to classify the ORG's expenditures from the 000000 fund for external reporting.

- | | |
|---|---|
| <ul style="list-style-type: none"> _____ 01 Instruction _____ 10 Sponsored Research _____ 11 Other, Separately Budgeted Research _____ 20 Libraries _____ 30 Student Aid _____ 40 Student Services _____ 50 Extension & Public Service (includes service centers, Museum, Arboretum, ICA, WXP, etc.) _____ 60 Auxiliary Enterprises: Dormitories _____ 61 Auxiliary Enterprises: Bookstore _____ 62 Auxiliary Enterprises: Dining | <ul style="list-style-type: none"> _____ 63 Auxiliary Enterprises: DRIA _____ 64 Auxiliary Enterprises: Other _____ 70 Hospitals & Clinics: Medical _____ 71 Hospitals & Clinics: Dental _____ 72 Hospitals & Clinics: Veterinary _____ 73 Hospitals & Clinics: Nursing _____ 80 Independent Operations (includes External Agencies) _____ 90 Management & General _____ 92 Fundraising _____ 93 Maintenance & Operation of Facilities _____ NA Not Applicable, parent ORGS only |
|---|---|

ORG Category: (choose only one)

This Category will be used to group organizations for internal reporting purposes.

- _____ ACADDEPT Academic Department. Can appoint standing faculty, offer courses, conduct research, and provide services.
- _____ ACADDDIV Division at Academic Department authorized to make standing faculty appointments
- _____ ACADPROG Other Academic Units. Cannot appoint standing faculty but can offer courses, conduct research, and provide services.
- _____ CENTINST Research Center or Institute. Primarily conducts research but may occasionally offer courses or provide services.
- _____ PUBSERV Public Service Organization. Primarily performs public, extension or community service, including clinics.
- _____ STUDSERV Student Service Organization. Provides direct support to students but does no instruction, research or service directly.
- _____ ADMIN Provides indirect support for instruction, research, and service.
- _____ AUXIL Auxiliary Enterprise. To be used ONLY by Dormitories, Bookstore, Dining, Athletics, etc.
- _____ SERVCENT Service Center. Performs services to support sponsored research. Designation must be approved by Federal Compliance.
- _____ EXTERNAL External Agencies. NOT Penn. Cannot be used as Home or Job Dept in payroll.

Should this ORG be listed in the University Directories? If YES, complete the following:

ORG Address and Mail Code: _____

Phone/Fax Numbers: _____

Email Address: _____

If NO, explain why not:

Does this ORG have people? If YES, complete the following:

What ORG currently holds this ORG's people in the Payroll System? _____

Should we allow this new ORG to be used as a Payroll Home/Job department? _____

If NO, explain why not:

Does this ORG offer courses? If YES, complete the following:

Existing Student Records (SRS) Dept Code: _____

If NO and ORG category is either ACADDEPT or ACADPROG, explain why not:

Does this ORG occupy space in buildings on campus? If YES, complete the following:

What ORG currently holds this ORG's space in the SPAN-FM system? _____

Should we allow this new ORG to be used as the occupant of Space? _____

If NO, explain why not:

Approvals:

Person Initiating

Senior Business Administrator of School/Center

Address: _____

Phone: _____

Fax: _____

Email: _____

Date: _____

For help in completing form, consult with **Fran Seidita** at (215) 898-6651 or seidita@upenn.edu

Return completed form to:
Financial Systems
319 Franklin Building/6284
benadmin@lists.upenn.edu