

# University of Pennsylvania

## Request to Create/Change ORGANIZATION (ORG)

\_\_\_\_\_ **Add New ORG**  
*fill in all sections*

\_\_\_\_\_ **Change Existing ORG**  
*PROG #, Name, & Description*

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

**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](mailto:seidita@upenn.edu)

Return completed form to:  
**Financial Systems**  
**319 Franklin Building/6284**  
[benadmin@lists.upenn.edu](mailto:benadmin@lists.upenn.edu)