University of Pennsylvania
Request to Create/Change ORGANIZATION (ORG)

[Check box: Add New ORG] [Check box: Change Existing ORG] [Check box: Disable Existing ORG]

fill in all sections

PROG #, Name, & Description

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.

______ 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, WXPN, etc.)

______ 60 Auxiliary Enterprises: Dormitories

______ 61 Auxiliary Enterprises: Bookstore

______ 62 Auxiliary Enterprises: Dining

______ 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.

______ ACADDIV  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