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

_____ Add New ORG
_____ Change Existing ORG
_____ Disable Existing ORG

fill in all sections

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.
______ 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