SJSU | FINANCE AND BUSINESS SERVICES

Finance – One Washington Square – San José, CA 95195-0008   Main: 408-924-1558

This checklist is designed to assist campus department end users in identifying tasks to complete when a change to their organizational structure occurs. These tasks should be completed after you have received confirmation that the Organization Change Request form submitted to the Budget and Financial Management Office *has been completed. For an overview, please see the* Department Organization Changes Guideline.

*This checklist is a reference tool only; it is not to be submitted to Finance. We have highlighted all tasks that have some type of impact on department finances and included other non-finance related tasks that **may** need to be completed. Please use this checklist as a reference, consulting with the appropriate entities as indicated below*.

Checklist

Task to Complete	Contact Information
☐ Submit System Access Request forms to CMS Security for changes to security in FTS, CFS, SJSU@Work, and MySJSU.	IT Service Desk 408-924-1530
☐ Submit Position Management Action form to University Personnel to: • Move positions between departments • Update absence reporting structure for existing positions • Change funding information for existing positions • Create new positions	University Personnel 408-924-2250
☐ Check employee information in the online directory If there are discrepancies, submit an iSupport ticket and include the employee's legal name, employee ID, department ID, location [building, floor, room] and phone number.	IT Service Desk 408-924-1530
☐ Submit request to Bursar's Office to change chartfield mapping for e-Market stores.	Bursar's Office 408-924-1601
☐ Submit request to the following service departments, as appropriate, to update default chartfield information. • Distribution Services [postage] • Contracts & Procurement Services [Campus Copier Program]	Distribution Services 408-924-1590 Campus Copier Program 408-924-1767
☐ Complete a DocuSign ProCard/GoCard Update Request as appropriate to: • Update Approving Official information • Update default chartfield information	FinanceConnect 408-924-1558

☐	Change chartfields for **open** transactions in Financial Transaction Services [FTS].	[FinanceConnect](#) 408-924-1558
☐	If there will be travel in this DeptID(s), contact your Division/College to update or setup the approval structure, as appropriate.	
☐	Review open Purchase Orders in CFS Data Warehouse and submit a Change Order in FTS, as appropriate to correct chartfields.	[FinanceConnect](#) 408-924-1558
☐	After all of the steps above have been completed, create Budget Journals, Expense Journals, and HR Expense Adjustment in FTS to correctly classify expenses, if needed.	[FinanceConnect](#) 408-924-1558
☐	Contact Asset Services to change the Custodian DeptID and/or location for tagged assets.	[Asset Services](#) 408-924-1590

Contacts

- **Asset Services**
  Phone: 408-924-1590
  Website: https://www.sjsu.edu/fabs/services/assets/index.php

- **Budget and Financial Management**
  Phone: 408-924-1558 Email: university.budget.office@sjsu.edu
  Website: https://www.sjsu.edu/fabs/services/budget/index.php

- **Bursar's Office**
  Phone: 408-924-1601 Email: bursar@sjsu.edu
  Website: http://www.sjsu.edu/bursar/

- **Campus Copier Program**
  Phone: 408-924-1767 Email: ccp@sjsu.edu
  Website: https://www.sjsu.edu/fabs/how-we-can-help/policies-guides/campus-copier-program.php

- **Distribution Services**
  Phone: 408-924-1590
  Website: https://www.sjsu.edu/fabs/services/distribution/index.php

- **FinanceConnect**
  Phone: 408-924-1558 Email: financeconnect@sjsu.edu
  Website: https://www.sjsu.edu/fabs/connect/contact-us.php

- **University Personnel**
  Phone: 408-924-2258 Website: http://www.sjsu.edu/up/

- **IT Service Desk**
  Phone: 408-924-1530 Email: itservicedesk@sjsu.edu

Forms/Guidelines

- **Change Order Request**: https://www.sjsu.edu/fabs/services/p2p/pay/change-order.php

- **Department Organization Changes Guidelines:** https://www.sjsu.edu/fabs/how-we-can-help/policies-guides/dept-org-changes.php

- **System Access Request**: https://www.sjsu.edu/it/security/forms.php

- **Position Management Request**: https://app.docusign.com/templates/details/756b3814-b9e2-4802-9e0b-0f5922c8cbf5

- **ProCard/GoCard Forms**: https://app.docusign.com/templates/details/83174a39-446d-495f-b172-6e1331fd3e7c