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**: http://www.sjsu.edu/it/security/forms/

- **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