Purpose

This document is used to provide guidance and understanding about the Organizational Tree process and various components.

The Organizational Tree Request is used to propose changes to Nodes (organizational entities) on the budget, finance, HR, and student Organizational Trees. The form must be approved before it is submitted to the Org Tree Committee for review. Once approved, email the request to MU ACCTG.

If requesting new Finance DeptIDs use the Chartfield Request Form. If requesting changes to existing Finance DeptIDs email MU ACCTG.

View Current Tree

The Org Tree Committee works to ensure that the Finance, HR, and Student organizational structures (via security trees) are in sync. That is important for various reporting requirements. The finance tree can be viewed by departments; however, the HR and student trees can only be viewed by the core office.

- *Finance:* FSPRD > Tree Manager > Tree Viewer > search Department_Rollup

Timing

Approved requests can be submitted throughout the month; however, the request should be effective dated for the first day of the month in which the department wants the change effective. The Org Tree Committee meets on the first Monday of the month to discuss proposed changes and either request additional information and pauses the request or will approve the request. An approved request is sent by the Committee to the appropriate office for updating the organizational structure. For the Finance tree, UM Controller's Office processes tree changes mid-month as identified by "Tree Maintenance" on the General Ledger Closing Calendar. For the HR tree, UM HR Information Systems processes tree changes the same week as the Finance tree, usually on Friday.

Node Components

- *Node name:* An abbreviation of the node description, which must start with a C (E for CVPEX) and contain the following number of characters.

Tree Level	Level Description	Node Characters	Node Example
Level 3	Executive	4	CSTU
Level 4	College/School/Division	5	CSTAF
Level 5	Department	8	CDEANSTD
Level 6	Sub-Department	10	CDEANSTDNT

- *Node description:* A concise identifier for the node, which must be limited to 30 characters.
- *Node level 7 (DeptIDs):* A finance tree level value using the DeptID chartfield to classify accounting information in PeopleSoft. The DeptID must start with a C (E for CVPEX) and contain 7 numeric characters to identify the Division, Department, and Sub-Department. (ex C0745002)

Division of Finance
University of Missouri

- *Common rules:*
  - Node names cannot be changed in order to preserve history for reporting.
  - Nodes can change levels, in which the name remains but description could be updated.
  - Node descriptions can be updated using the request form.
  - Nodes can only be inactivated; not deleted. To indicate that a node has been inactivated, ZZZ will be added as the first three characters in the node description. Once inactivated, the node level will no longer be available to view in WebApps; therefore, it is recommended that Finance DeptIDs are placed under an active node.
  - Finance DeptID ranges are created for new nodes allow for multiple DeptIDs to be created under the node as needed. (ex C0755001-C0755999)
  - Finance DeptIDs can be moved between nodes; however, the preference is to leave the existing DeptID and establish a new DeptID using the range identified for the node. This will preserve history in the old node and there will be an audit trail showing movement between the old and new DeptIDs.
  - The Chancellor must approve all "Center(s)" in accordance with CRR 50.010.
  - The Provost will assist with use of terms such as *college, school,* and *department* in the node name.

Employee Components
- *Home Department:* Employees must have an identified home department that has fiscal, programmatic, and administrative responsibility for the employee.
- *Tenure/Tenure Home:* For academic appointments, the department responsible for recommending tenure.
- *Common rules:*
  - Identify if the node will contain any employees (create) or has existing employees (move or inactivate).
  - Before processing Personnel Action Forms (ePAF), work with the Assoc Director HR & Payroll for timing of changes and most efficient manner for changes.
  - If nodes are inactivated, all active employees/positions must be moved from the existing node prior to effective date of inactivation. Please work with the Assoc Director HR & Payroll for timing of changes and most efficient manner for changes.
  - If academic appointments will move, please contact the Provost's Office for possible updates needed in MyVita.

Academic Components
- *Degree Program (new/change):* The Provost's Office can assists with requests for new or changes to courses in accordance with CRR 20.036. Guidance

available at https://www.umsystem.edu/ums/aa/degrees-new-degree-programs and http://provost.missouri.edu/deans/index.php.

- *Course Program (new/change):* The Registrar's Office and Student Information Systems can assist with requests for new or changes to courses. Guidance available at http://registrar.missouri.edu/faculty-staff/#cim-courses.
- *Academic Discipline Codes:* Classification and standard terminology for post-secondary instructional programs. Represented by 8 alpha and numeric characters (annnnnna). Alternative is *Classification of Instructional Programs Code (CIP Code)* represented by 6 numeric characters (nn.nnnn)
- *Common rules:*
  - Before processing changes, please work with the Provost's Office or Registrar's Office for vetting structure and proper terminology for the request.

Approvals

The Organization Tree Request must be approved by the Vice Chancellor or designee for the divisions impacted. The request is to be approved by the FIN Finance Structure-Responsible-Division for the divisions impacted.

Next Steps

Once tree changes have been completed, departments continue to take action.

- *Budget:* Add budget for new DeptIDs to ensure transactions will post to the general ledger.
- *Finance:* Update FIN Authorization for transaction workflow approvals and access to financial information. Update FIN Finance Structure for Accountable and Responsible if new nodes were added to the tree.
- *HR:* Update authorizations for workflow of ePAFs and Time & Labor. Continue to process necessary ePAFs to adjust employee's home departments or earnings distribution lines. Changes generally also affect performance management and supervisory approval structures.
- *Student:* Verify academic changes approved from the Provost's Office have been made in myZou table structure and ACAD STRUCTURE Tree.