

Organizational Tree Guide

Purpose

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

The Organizational Tree Request is used for proposed changes to Nodes impacting the budget, finance, HR, and student Organizational Trees. The request is a fillable form with “helpful hints” over various fields. The approved form is submitted to the Org Tree Committee for review by emailing the request to [MU ACCTG](#).

If requesting new DeptIDs use the [Chartfield Request Form](#). If requesting changes to existing DeptIDs email [MU ACCTG](#).

View Current Tree

The Org Tree Committee works to ensure the Finance, HR, and Student trees are in line 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

The request should be effective dated for the first day of the month in which the department wants the change effective. Approved requests can be submitted throughout the month. The Org Tree Committee meets on the first Monday of the month to discuss proposed changes. The UM Controller’s Office then makes the Campus approved tree changes mid-month as identified by “Tree Maintenance” on the [General Ledger Closing Calendar](#).

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	CSTDAUXS
Level 6	Sub-Department	10	CUNIVSTR

- *Node description:* A concise identifier for the node, which must be limited to 30 characters.
- *Node level 7 (DeptIDs):* A financial tree level chartfield used to classify accounting information in PeopleSoft by either Department or Sub-Department, which must start with a C (E for CVPEX) and contain 7 numeric characters to identify the Division, Department, and Sub-Department. (ex C0755001)
- *Common rules:*

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- 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 a node has been inactivated for reporting, 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 DeptIDs are placed under an active node.
- DeptID ranges are created for new nodes allow for multiple DeptIDs to be created within the node as needed. (ex C0755001-C0755999)
- 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*.

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 assist with requests for new or changes to courses in accordance with [CRR 20.036](#). Guidance

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available at <https://www.umssystem.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 (annnnna). 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.