

KFS Org Checklist for Document Initiators: Requesting New Org

✓	Item	Notes
	Review Current Org Structure	Is this a new unique program that would be best tracked by a new org?
	Review UC Accounts within Orgs	Is the activity different than existing activity in other existing orgs?
	Review Current UCPATH Department Structure	For appointment or security reasons, does it need to be in UCPATH as a department?
	KFS Fiscal Officer Initiates Request using Org Document in KFS	Use placeholder for Org number (7XXX , or other generic sequence). In the description, explain the reason for the new Org.
	Ensure Org name must be 30 characters or less.	To keep KFS and UCPATH synchronized, names have to be only 30 characters, because UCPATH only allows 30. Even if the Org will not be in UCPATH, it must be 30.
	If needed, request to add the new Org to UCPATH department in document description.	The Budget Office will forward request for new UCPATH Department to Campus' UCPATH team, and they will submit request to Path Center to update UCPATH.
	Provide Budget Office with Default UCPATH Account	All UCPATH departments need a default account in the event of a payroll error. Units tend to have one account for all their departments. It is not necessarily the same as the default account used in the KFS Org document.
	Submit Org Document for Review	Once submitted, the document will route within the unit, and then it will go to Budget Office for approval. After the Budget Office, Accounting will also approve.
	Create or Move UC Accounts, once the Org is Established	Work with Accounting to create new UC accounts or move existing UC accounts. Note transactional accounts must be at the lowest level in the given Org structure.
	Create or Move KFS Accounts, once the UC Accounts are in the Org	Create new KFS accounts or move existing KFS accounts, after Accounting assigns the UC Accounts. Note transactional accounts must be at the lowest level in the given Org structure.

Updated 12/24