University of Pennsylvania
Request to Create/Change ORGANIZATION (ORG)

_____ Add New ORG  _____ Change Existing ORG  _____ Disable Existing ORG

fill in all sections                  PROG #, Name, & Description                  PROG # & Description

ORG #: ________  Parent ORG#: ________  ORG SHORT NAME: ______________________

(15 characters, ALL CAPS)

Organization Name: _____________________________________________________________________________

(60 characters, mixed case, but Payroll truncates at 26 characters)

ORG Type:  (choose only one)

_______  UN  Unit: Academic Department or Administrative Entity
_______  SU  Subunit: Division of a Unit
_______  SS  Sub-subunit: Subdivision of a Subunit for management purposes
(usually used in the case of Service Centers reporting to subunits)

Description of new ORG or the nature of change to existing ORG:

_____________________________________________________________________________________________

_____________________________________________________________________________________________

ORG Primary Purpose:  (choose only one)

This Purpose will be used to classify the ORG’s expenditures from the 000000 fund for external reporting.

_______  01  Instruction
_______  10  Sponsored Research
_______  11  Other, Separately Budgeted Research
_______  20  Libraries
_______  30  Student Aid
_______  40  Student Services
_______  50  Extension & Public Service (includes service centers, Museum, Arboretum, ICA, WXPN, etc.)
_______  60  Auxiliary Enterprises: Dormitories
_______  61  Auxiliary Enterprises: Bookstore
_______  62  Auxiliary Enterprises: Dining
_______  63  Auxiliary Enterprises: DRIA
_______  64  Auxiliary Enterprises: Other
_______  70  Hospitals & Clinics: Medical
_______  71  Hospitals & Clinics: Dental
_______  72  Hospitals & Clinics: Veterinary
_______  73  Hospitals & Clinics: Nursing
_______  80  Independent Operations (includes External Agencies)
_______  90  Management & General
_______  92  Fundraising
_______  93  Maintenance & Operation of Facilities
_______  NA  Not Applicable, parent ORGS only

ORG Category:  (choose only one)

This Category will be used to group organizations for internal reporting purposes.

_______  ACADDEPT  Academic Department. Can appoint standing faculty, offer courses, conduct research, and provide services.
_______  ACADDIV  Division at Academic Department authorized to make standing faculty appointments
_______  ACADPROG  Other Academic Units. Cannot appoint standing faculty but can offer courses, conduct research, and provide services.
_______  CENTINST  Research Center or Institute. Primarily conducts research but may occasionally offer courses or provide services.
_______  PUBSERV  Public Service Organization. Primarily performs public, extension or community service, including clinics.
_______  STUDSERV  Student Service Organization. Provides direct support to students but does no instruction, research or service directly.
_______  ADMIN  Provides indirect support for instruction, research, and service.
_______  AUXIL  Auxiliary Enterprise. To be used ONLY by Dormitories, Bookstore, Dining, Athletics, etc.
_______  SERVCENT  Service Center. Performs services to support sponsored research. Designation must be approved by Federal Compliance.
_______  EXTERNAL  External Agencies. NOT Penn. Cannot be used as Home or Job Dept in payroll.
**Does this ORG offer courses?** If YES, complete the following:
Existing Student Records (SRS) Dept Code: _____________________
If NO and ORG category is either ACADDEPT or ACADPROG, explain why not:
____________________________________________________________________________________________________________
____________________________________________________________________________________________________________
____________________________________________________________________________________________________________

**Does this ORG occupy space in buildings on campus?** If YES, complete the following:
What ORG currently holds this ORG’s space in the SPAN-FM system? _____________________
Should we allow this new ORG to be used as the occupant of Space? _____________________
If NO, explain why not:
____________________________________________________________________________________________________________
____________________________________________________________________________________________________________
____________________________________________________________________________________________________________

**Approvals:**

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<th>Person Initiating</th>
<th>School/Center Access Administrator</th>
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For help in completing form, contact your analyst in the Office of Budget Planning & Analysis

Return completed form to:
**Financial Systems**
319 Franklin Building/6284
benadmin@lists.upenn.edu

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