

Standard Operating Procedure

Procedure Type

- DFA Procedure
- Unit-Specific Standard Operating Procedure

Topic:	Department Add/Change Process: Establish campus procedures and department add/change processes, including documentation requirements and the role of the Budget Office in managing organizational changes.
Functional Area(s):	Budget Office, UCI UCPATH
Responsible Officer(s):	Kyong Salmons, Peter Stacholy
Project Sponsor:	Georgana Thompson Simonowitz
Last Revised Date:	4/20/2026

I. Purpose

The purpose of this procedure/process is to maintain correspondence between KFS organizations and UCPATH departments for campus and COHS department adds/changes.

II. Definitions/Acronyms

Add definitions/acronyms that are procedure specific or assist in clarifying the procedure.

Acronym	Term	Definition
BRD	Business Requirements Document	A document that provides a detailed description of an upcoming project.
COHS	College of Health Sciences	Susan & Henry Samueli College of Health Sciences
FAU	Full Accounting Unit	All chart fields needed to fully describe a financial transaction.
Jira	Software Name	Project management and issue-tracking software.
KFS	Kuali Financial System	UC Irvine’s comprehensive enterprise financial system.
UCPC	UCPATH Center	The systemwide service center for UCPATH in Riverside, CA.

III. Roles

List authorities and responsibilities for all personnel who use the procedure.

Role	Responsibilities
Budget Office	All department change requests must go through here for KFS organizations and UCPATH departments.
UCI UCPATH	UCI UCPATH (Peter Stacholy) prepares a JIRA requesting the change after the Budget Office approves.
UCPATH	UCPATH completes the changes in the system in accordance with a Jira.

IV. Procedure

List/describe the activities necessary to complete a process (e.g., process map, flow chart, swim lane, etc.), including who, what, when, and how.

To Note:

- COHS follows the campus procedure; it falls under the campus umbrella.
- The UCI Medical Center has a different process that works well for them.
- Only KFS organizations holding people or salary expense need HR department equivalents in UCPATH.

Department Add/Change Process Overview (Campus and COHS)

- The requestor is responsible for socializing this request with their department and CPO prior to contacting the Budget Office to begin this process.
- Department add/change requests, including name changes, must go through the Budget Office. Requestors contact the Budget Office first. This includes initiating the approval process for changing the department Default Account. *Note:* The department Default Account is not meant for regular use; it is a backup only when other accounts are invalid.
- The Budget Office continues the process with an email. They email the department change request template to UCI UCPATH (Peter Stacholy).
- UCI UCPATH (Peter S.) receives the email with the department change request template.
- UCI UCPATH (Peter S.) creates a Jira ticket with the necessary documents when he receives a change request, including a BRD, department table request, and FAU template.
- If the request is just to rename a department, there is no FAU template required.
- If the default department account only needs to be changed, UCI UCPATH (Peter S.) manually changes default departments as requested by the Budget Office.
- UCI UCPATH (Peter S.) saves these files with the ticket number for easy reference and tracks them in a spreadsheet, which he refers to if a department requests an update.
- The Jira goes to the UCPC as soon as UCI UCPATH (Peter S.) submits it.
- The UCPATH Center then takes over the processing of the request.

Department Add/Change Process Overview (Medical Center)

- The Medical Center's Controller's Office initiates a request to the Medical Center HR Department.
- The Medical Center HR Department then submits the template to UCI UCPATH (Peter Stacholy).
- UCI UCPATH (Peter S.) receives the email with the department change request template.
- UCI UCPATH (Peter S.) creates a Jira ticket with the necessary documents
- when he receives a change request, including a BRD, department table request, and FAU template.
- If the request is just to rename a department, there is no FAU template required.
- If the default department account only needs to be changed, UCI UCPATH (Peter S.) manually changes default departments as requested by the Budget Office.
- UCI UCPATH (Peter S.) saves these files with the ticket number for easy reference and tracks them in a spreadsheet, which he refers to if a department requests an update.
- The Jira goes to the UCPC as soon as UCI UCPATH (Peter S.) submits it.
The UCPATH Center then takes over the processing of the request.