

Department ID Inactivation Checklist for Requestors

Prior to requesting to inactivate a Dept ID, please review the items listed below and ensure that those appropriate to the Dept ID inactivation you are requesting are completed. This signed checklist must accompany any Dept ID inactivation request, including those made through the Chartfield Request System. Please notify your budget analyst (http://budget.ncsu.edu/budgetoffice/documents/topic_contact_list.pdf), copying mlobrien@ncsu.edu, rjbernar@ncsu.edu, shpeasle@ncsu.edu, and hmkozlow@ncsu.edu.

Department ID to Inactivate: _____

- Peoplesoft Financials** *For questions, please contact your assigned budget analyst.*
Check Chartfield Inquiry to verify no active projects are linked to the Dept ID to be inactivated. In the MyPack Portal, navigate to Financial Systems > Monitoring Tools & Reports > Chartfield Inquiry.
- Purchasing/Open POs** *For questions, please contact Monica O'Brien in Purchasing at (919) 513-3416.*
1. Verify there are no open POs or MarketPlace orders linked to the Dept ID to be inactivated.
2. Run MM_POBAL_BY_DEPT_ID query in the Financials Reporting System for the current fiscal year and Dept ID. The results are open purchase orders with the encumbrance balances listed.
3. Run MM_MP_POBAL_BY_DEPT_ID query in the Financials Reporting System for the current fiscal year and Dept ID. The results are open MarketPlace orders with the encumbrance balances listed.
- Payroll / Human Resources** *For questions, please contact Ryan Bernarduci in HRIM at (919) 515-7630.*
The HR System will not pay employees in an inactive Dept ID. To ensure that there are no interruptions to employees' pay, please complete the following steps:
1. Run HR_ACTIVE_EMPLOYEE_BY_OUC query in the HR Reporting System to identify any active employees appointed to the Dept ID to be inactivated.
2. If any active employees are appointed to the Dept ID to be inactivated, move the employees to another active Dept ID.
- Redistributions & TEARS** *For questions, please contact Susan Peaslee in Contracts & Grants at (919) 515-8013.*
It is not possible to perform a payroll redistribution on an employee paid from an inactive Dept ID. If there are employees with salary being charged to a contract and grant project (5xxxxx), the TEARS Effort Report may be impacted. Any necessary redistributions need to be processed prior to inactivating the Dept ID.
- Security** *For questions, please contact Debbie Nosse in OIT at oit_access_mgmt@help.ncsu.edu.*
If necessary, initiate and complete SAR Requests to remove existing access to the Dept ID being inactivated (i.e. when someone has access to the specific 6-digit Dept ID such as with IDT access). If someone has broader access (i.e. to the 2-digit Dept ID so that they have access to all Dept IDs within a unit/college), then access does not need to be altered.
- Asset Management** *For questions, please contact Heidi Kozlowski in University Accounting at (919) 515-1554.*
1. Run PSAM_EQUIP_BY_OUC_SHORT to verify that no active assets remain under the Dept ID(s) to be deactivated.
2. Complete and submit Transfer Request(s) to move any active assets identified under step 1 to the appropriate new Dept ID(s).
3. Re-Run PSAM_EQUIP_BY_OUC_SHORT to verify that no active assets remain under the Dept ID(s) to be deactivated.

Signature: _____ Phone: _____ Date: _____

College Level Approver signature required

Updated 12/02/21