Checklist For Establishing New Centers and Moving Organizations

☐ **Create the Center**
  ☐ Designate the Key Staff
    ☐ Senior Business Administrator ☐ Security Administrator
    ☐ Center Reference Administrator(s) ☐ BEN Key Contact
  ☐ Establish the Purchasing Hierarchy
  ☐ Create Center Reference codes

☐ **Create and Map the Organizations**
  ☐ Create Parent Organization(s)
  ☐ Create Child Organization(s)
  ☐ Flag old organization(s) for deletion
  ☐ Create or revise Legacy account number mappings for Bursar
  ☐ Create or revise vendor location for home department in purchasing

☐ **Move people into the new organizations**
  ☐ Create or transfer position numbers into new orgs
  ☐ Hire or transfer people into positions
  ☐ Create or revise security profiles for all staff
    ☐ BEN ☐ Payroll ☐ Time Reporting ☐ Salary Management
    ☐ Pillar ☐ SRS ☐ SFS ☐ Data Warehouse ☐ Other?

☐ **Move space into the new organizations**

☐ **Move property into the new organizations**

☐ **Move money into the new organizations**
  ☐ Reallocate current year budget and revise future budget plans
  ☐ Review "ownership" and move balances
    ☐ Buildings ☐ Equipment ☐ Loans ☐ Pledges
    ☐ Cash ☐ Capital Projects ☐ Other?
  ☐ Revise "Responsible Organization" and move balances
    ☐ Endowment Funds ☐ Gift Funds ☐ Grants
    ☐ Agency Funds ☐ External Organizations

☐ **Other Financial Administration Tasks**
  ☐ Request or revise ☐ ProCards ☐ TAC Cards ☐ Petty Cash
  ☐ Notify travel office to revise travel profiles and locations
  ☐ Notify ISC other departments with feeder systems
  ☐ Change internal systems as needed

☐ **Create or revise Directory Listings**
  ☐ Green Pages ☐ White Pages ☐ Blue Pages ☐ Online

☐ **Order New Letterhead and Business Cards**