Changing Organizational/Major Department: Administrative Task Guide for Employees Moving to New or Existing Departments

An employee's assigned Unit, Division, Department, and Sub-department (UDDS) in HRS may change when a unit moves from one division to another (for example, Research and Sponsored Programs moved from A02 to A34) or when a Principal Investigator changes departments within the same Division. Many processes can be affected by such a change of record.

This list provides Division HR a starting point to consider the downstream effects of an employee's UDDS change and provides guidance for the necessary updates and communications to assist with a smooth transition. This list is not exhaustive and not every item listed below will affect every individual. Additionally, campus units may have unique processes and workflows in place which will determine the order and timeline on which the listed tasks are carried out. Consider additions to this checklist according to unique needs of the School/College/Division.

This document is not intended to be used if only the funding UDDS is being changed.

Task	Responsible	Resources
General		
Complete all steps/obtain approval for new or changed Organizational Department	Division HR	Entering Organizational Department Additions and Changes in HRS KB: kb.uwss.wisconsin.edu/page.php?id=81988#toc1
If international faculty or staff, consult with International Faculty and Staff Services (IFSS)	Division HR	International Faculty and Staff Services: hr.wisc.edu/about/international-faculty-and-staff-services/
Request I-9 access for appropriate admin/payroll staff	Division HR to IFSS	Obtain System Access: ohr.wisc.edu/cop/docs/system-access.pdf
Transfer FTEs to new department	Division HR	Use the mass upload template if the change impacts 100+ employees. • Manual change to department in Position Data: kb.uwss.wisconsin.edu/16273#toc5 • Mass Upload Template: uwservice.wisc.edu/docs/forms/hr-org-dept-changes-requests.xlsx
Update HRS funding	Division HR	Funding Checklist and Timelines in HRS KB: kb.uwss.wisconsin.edu/28617
Update HRS Time and Labor Security	Division HR	Creating and Maintaining Time and Labor Security in HRS KB: kb.uwss.wisconsin.edu/17043
Update 'Reports To' field in HRS	Division HR	Running the REPORTS TO Report in HRS KB: kb.uwss.wisconsin.edu/90250
HR Information Systems (HRIS)		

Task	Responsible	Resources
Review and request security for HR systems (TREMS, HRS, JEMS, PMDP, Cypress, etc.)	Division HR to appropriate team depending on system (HRIS, TRE, etc.)	• HRS Security webpage: hr.wisc.edu/hr-professionals/systems/hrs-security/ • Obtain System Access: www.ohr.wisc.edu/cop/docs/system-access.pdf
Payroll		
Review default TL Security	Division HR	• TL Security Mass Upload Template www.ohr.wisc.edu/docs/TLSecurityMassUploadTemplate.xlsx
Level 2 Additional Pay approvers	Division HR	Email hris@ohr.wisc.edu with changes.
Review missed payroll, stop payment, and check correction access	Division HR	To gain access to request or approve a Missed Payroll or Check Correction, email serviceoperations@uwss.wisconsin.edu. • Processing Check Corrections in HRS KB: kb.uwss.wisconsin.edu/page.php?id=27632 • Submitting an Off-Cycle Missed Payroll Request (Biweekly) in HRS KB: kb.uwss.wisconsin.edu/page.php?id=41378 • Processing ACH Reversals and Stop Check Payments in HRS KB: kb.uwss.wisconsin.edu/21590
Change default payroll coordinator in HRS	Division HR	Creating and Maintaining Time and Labor Security in HRS KB: kb.uwss.wisconsin.edu/17043
Talent Acquisition (TA)		
For open recruitment in TREMS, use new department in offer letter	Division HR	This is updated directly in the offer letter in TREMS.
Change department in JEMS for any open recruitments, before pushing through JEMS Hire.	Division HR	Notify your Talent Acquisition Specialist to change department in JEMS.
Create transfer plan of any open searches	Division HR	Contact Talent Acquisition Specialist.
Update Supervisor in Performance Management and Development Program (PMDP)	PMDP Administrator for the new department	• PMDP HR Administrator Training: hr.wisc.edu/docs/pmdp/pmdp-hr-administrator-training.pdf
Benefits		
If employee is moving to a new division, review for • active ICI claims • layoff status • military leave	Division HR	Email benefits@ohr.wisc.edu alerting Benefits of the new Division HR contact for affected employee(s).

Task	Responsible	Resources
Give employee contact information for leave or benefits questions in their new department/division.	Division HR or P&B Specialist	hr.wisc.edu/contact
Workforce Relations (WR)		
Provide notice to employees about the upcoming change (cc: OHR WR), including: • New department • New operational area • Supervisor • New applicable divisional policies • New governance representative • Special training they may need (i.e., HIPAA) • New HR contact • DDR contact • Other requirements (i.e., flu shots)	Division HR	Use operational area change letter. This letter needs to be placed in employee's personnel file. Note: If layoffs occur within six months of the operational area change explanation for the change will need to be provided. Layoff will be considered if explanation provided is reasonable.
If moving between Schools/Colleges/Divisions, signed memo required from both parties	Division HR/Dean or Director from each department	Request memo from WR.
Create org chart which needs to be included when the division sends the letter to OHR WR	Division HR	
Transfer personnel files/complete Personnel Transfer Record (PTR)	Division HR	
Review open issues (employee relations, FMLA, etc.) and determine transfer plan	Division HR	
Meet with employees to educate on what is and is not changing.	Supervisor/ Division HR	If required, consult in advance with WR to identify any potential risks regarding discrimination, retaliation or layoff. Note: Consider employees on leave of absence and how to notify them.
Request HireRight (Criminal Background Check) access for	Division HR	Contact WR.

Task	Responsible	Resources
appropriate admin/payroll staff		
Review employees on Leave of Absence	Division HR	Note: This group may not be captured in the department change. This step must occur before updating HRS funding.
Miscellaneous		
Update email/contact lists		
Update parking coordinators list and update departments	Department parking coordinator	
Prepare transition plan for cash management, purchase orders, cost transfer tool, approval authorizations for eReimbursement, etc.; transition P-cards		
Refer employees to Employee Assistance Office (EAO) if needing help dealing with the changes		hr.wisc.edu/employee-assistance-office/
Update internal and external websites, and other public-facing content (org charts, letter templates, etc).		
Tenure-Track Faculty Considerations		
Obtain approval of the University Academic Planning Council if a tenure department is being established or being closed.	Academic Deans/ Division HR	secfac.wisc.edu/governance/faculty-legislation/fpp_ch_5/#5.01. Note: If the department is decommissioned, all tenured faculty must move to a new tenure home.
If moving to a new tenure department, Academic Deans will work with appropriate HR Office to make updates.	Academic Deans/ Division HR	
Provide formal communication of date of change to faculty member of new department upon approval.	Academic Deans/ Division HR	
Enter department change in Position Data in HRS.	Division HR	
Change tenure home within the Tenure module in HRS.	Secretary of the Faculty's Office	Entering Tenure Tracking in HRS KB: kb.uwss.wisconsin.edu/15815

Office of Human Resources
UNIVERSITY OF WISCONSIN-MADISON