Department Inactivation
Job Aid

Departments that are no longer used/needed may be inactivated. Inactivating a department prevents any transactions erroneously posting to the department while maintaining all historical data for reporting purposes. To request or approve the inactivation of a department, please follow the steps in the relevant section of this job aid.

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Overview

Inactivation prevents new transactions from being posted but does not delete any historical transactions or other data associated with a department. The department and all associated data are still available for reporting.

Department inactivation can be requested within Financials by the Budget Managers of the respective departments. The process will verify the eligibility of a department for inactivation (see the Eligibility Criteria section for details). If a department is eligible, the Budget Manager may submit the inactivation request through an approval workflow.

Security and Workflow. Only Budget Managers of a given department may verify eligibility and submit that department for inactivation.

The Dean, Director, Department Head, or Chair (DDDHC) associated with the department must approve the inactivation before the final reviews/approvals by central office approvers in Research, Human Resources, Controller's Office, and Budget Office. Once all approvals have been made, the department will become inactivated.

Effective Date. Departments will be inactivated with an effective date of when the inactivation request was fully approved.

Eligibility Criteria. A department must meet all the requirements to be eligible for inactivation. Those criteria are listed below.

1. No open/active project.
2. No ledger balances for the previous four (4) fiscal years.
3. No capital assets.
4. No non-capital assets.
5. No capital projects.
6. No pending requisitions.
7. No open purchase orders.
8. No unposted vouchers.
9. No purchasing card (PCard) holders.
10. No pending PCard transactions.
11. No posted or unposted budget journals in the current fiscal year.
12. No pending/approved Travel Requests or pending Expense Reports in Concur. (NOTE: This criterion is verified separately from the eligibility verification process within Financials.)

Reactivation. If reactivation is required, please get in touch with the Budget Office (budget@fsu.edu).

Repurposing. Repurposing, or "recycling," departments is not allowed. If a new department is needed, please submit the "Establish a New Department ID" form accordingly.
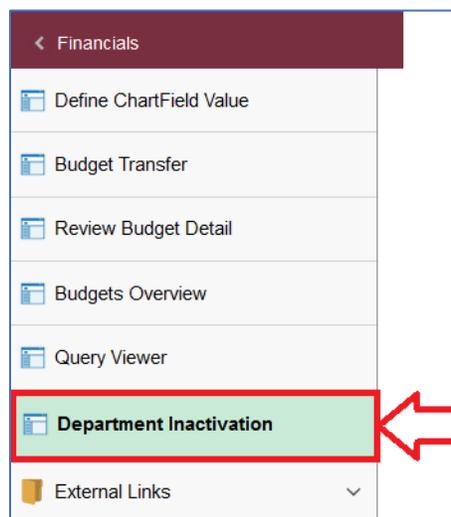
Navigation

Login to Financials via the myFSU portal, and select the "Financials" page from the dropdown:
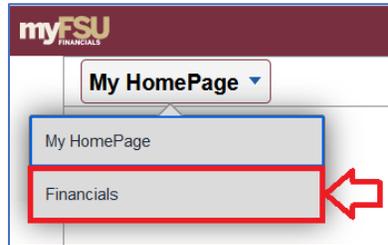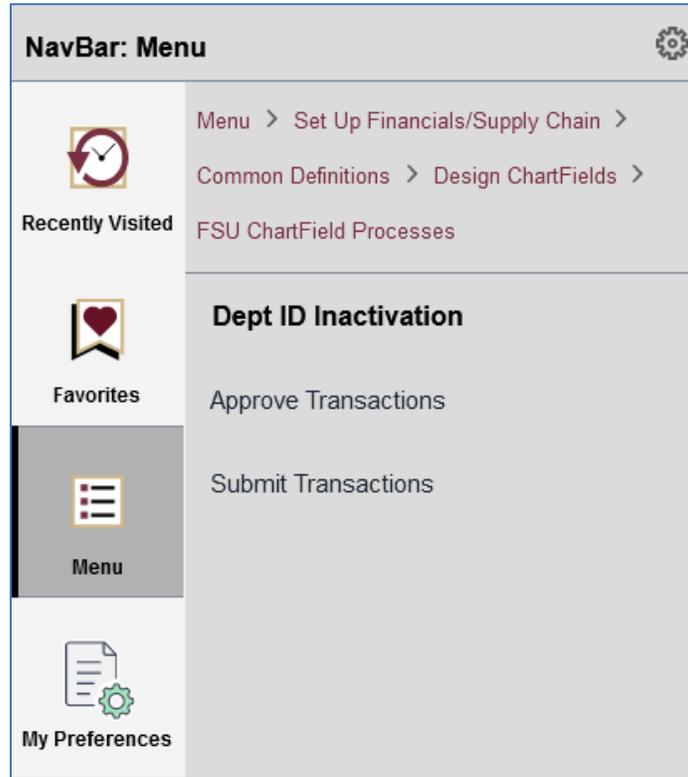
Select the "Budget Management" tile:

And then select the "Department Inactivation" link on the navigation pane on the left-hand side of the screen:

The NavBar navigation within Financials is as follows: Menu > Set Up Financials/Supply Chain >
Common Definitions > Design ChartFields > FSU ChartField Processes > Dept ID Inactivation.

Submitting a Department for Inactivation

To begin, navigate to the "Department Inactivation" module within Financials (see the Navigation section for navigation assistance).

Department Inactivation. As a Budget Manager, you may submit only your departments for inactivation. Select the "Department Inactivation" module to do so.

Search Departments. Use the "Search Departments" box to search for a particular department, a range of departments, a department based on who the DDDHC is, or based on the Approval Status. Click the "Search" button to see all departments that meet the search criteria.
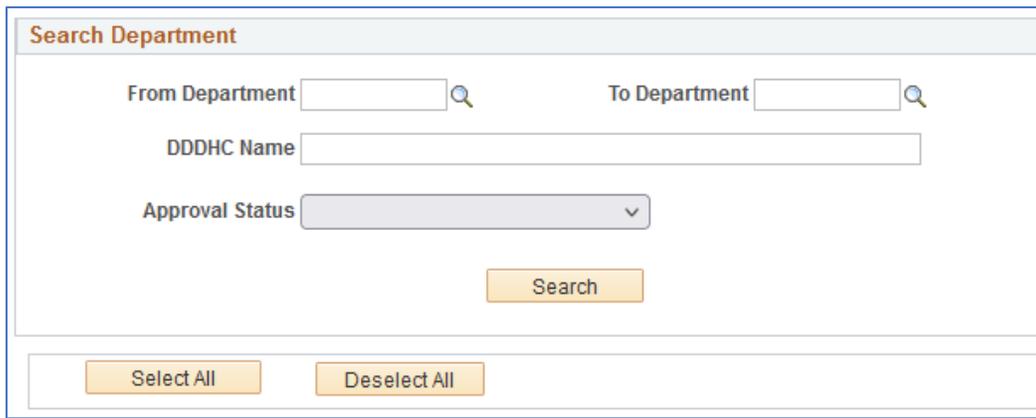
Approval Status. There are seven (7) approval statuses: (1) Approved, (2) Denied, (3) Pending Action, (4) Submission Process Requested, (5) Submitted for Approval, (6) Verification Completed, and (7) Verification Requested.

All departments have a default status of "Pending Action." Below is a screenshot of a department not yet verified or submitted for inactivation.
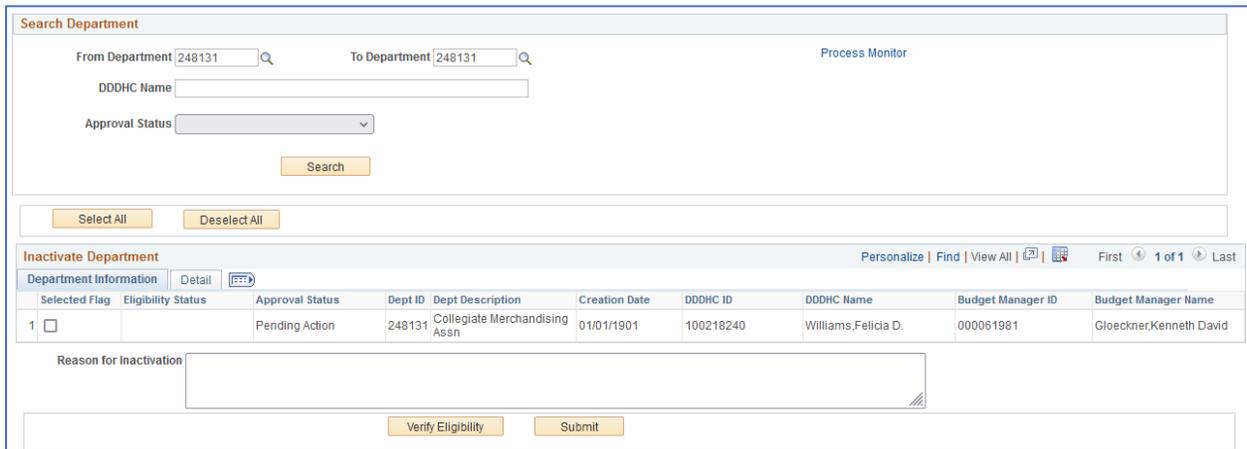
Verify Eligibility. Select the department(s) you wish to verify eligibility for in the "Inactivate Department" section and click the "Verify Eligibility" button. You do not need to enter a reason for inactivation to verify eligibility.

The verification process may take a few moments to complete. It will take longer to complete when multiple departments are being verified for eligibility. To check the verification progress, you may do so with the Process Monitor link in the "Search Departments" box at the top.

Once the verification process has been completed, click the "Search" button again to refresh the results. The department's eligibility status will be listed accordingly. In the example below, the department is eligible for inactivation and may be submitted for inactivation.

Submit. To submit the department(s) for inactivation, please enter a reason for the inactivation and click the "Submit" button. Once submitted, the department will proceed through an approval workflow. Please see the Security and Workflow section for more details.

Inactivate Department

	Selected Flag	Eligibility Status	Approval Status	Dept ID	Dept Description	Creation Date
1	☑	Eligible	Verification Completed	248131	Collegiate Merchandising Assn	01/01/1901

Reason for Inactivation Student group no longer exists. Department needs to be inactivated accordingly.

Verify Eligibility   Submit

Approving a Department for Inactivation

As a DDDHC, you may approve or deny any departments submitted for inactivation. Please remember prior to approval workflow, the department has been determined to be eligible for inactivation (see the Eligibility Criteria section for more details).

> **NOTE:** Verifying that no pending/approved Travel Requests or pending Expense Reports in Concur is done manually outside of Financials. The Budget Office will verify this criterion before the final approval.

Email Notification. You should receive an automated email with a link to the inactivation request. The link will take you directly to the approval workflow page for the department inactivation request.
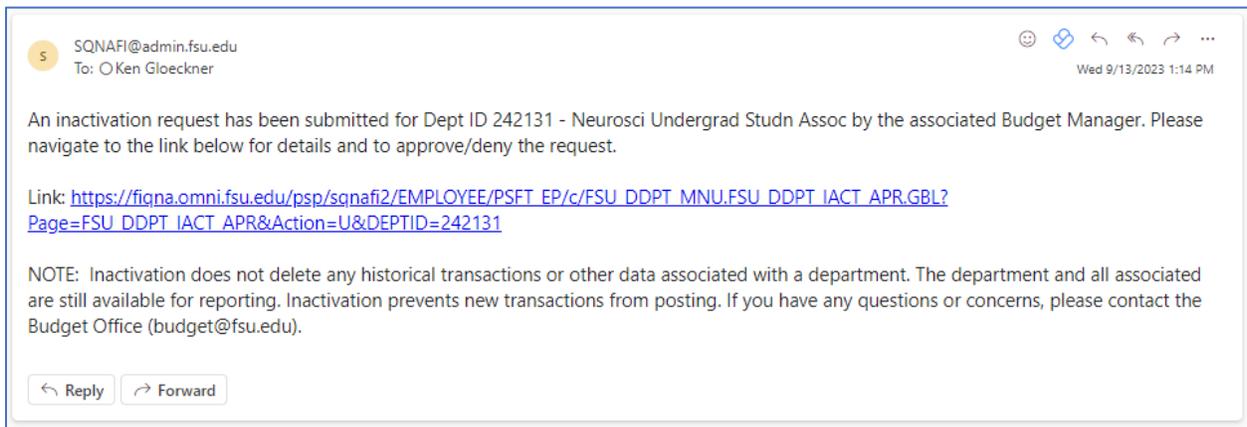
If you wish to navigate through Financials to find all outstanding inactivation requests, please see the following section.

Find an Inactivation Request. To begin, navigate to the "Approve Transactions" module within Financials (see the Navigation section for navigation assistance).

Click the "Search" button to see the departments available for approval. If more than one department is available for approval, they will be listed below. Otherwise, you will be taken directly to the department awaiting approval.

Review Information. The top section of the Approve Department Inactivation page provides information about the department (Department ID, Name, DDDHC, Budget Manager, Purpose, etc.) and the reason for the inactivation request.

Approve or Deny Inactivation Request. The bottom of the screen has Approve and Deny buttons as well as the approval workflow steps and each approver. Enter an approver comment (optional) and click either the Approve or Deny button.

Important Information

Please note that inactivation does not delete any historical transactions or other data associated with a department. The department and all associated are still available for reporting. Inactivation prevents new transactions from posting.

Approver Comments

[Approve]   [Deny]

Department Inactivation Stage

▼ **FSU_DEPT_INACTIVATE:Pending**

Department Inactivation Path

Pending	Not Routed	Not Routed	Not Routed	Not Routed
SSEMINOLE	ACROSBY	Gail Friedrich	Katherine Perkins	Kenneth Gloeckner
FSU Dean/Dir/Dept Head/Chair	FSU Office of Research	FSU Office of Human Resources	FSU Controller's Office	FSU Budget Office

Once the inactivation request has been fully approved, the department will become inactivated effective the date as the final approval.