Quick Reference Guide: Change Organization Assignments (for Worker only & by Organization)

Keep in mind

- Organization assignments include the assignment of an HRMS Department Number, Affiliated Organization (if applicable) and a default FAS Account and Sub Account. These assignments reside on the position.
- This task will appear in the Create Position, Edit Position Restrictions, Hire, Change Job and Add Job business processes and can also be initiated as a stand-alone business process.
- The default FAS Account that resides on the position should be either confirmed or overridden by Assigning Costing Allocations at both the Worker and Position level (see Assign Costing Allocations Quick Reference Guide).
- In order to update the organization assignments for all workers in a supervisory organization, the Change Organization Assignments for Worker by Organization business process should be initiated.

Information Needed

- HRMS department number
- FAS Account Number and Sub Account number that will be used as the default level of funding for the position.
- For workers (both employees and contingent workers) that have an affiliation, the affiliated organization (i.e. 9AR Argonne, 9FL Fermi National Accelerator Lab, 9NS Northshore or other applicable organization must be entered in the Affiliated Organization field.

Change Organization Assignment for Worker Steps:

1. From the Worker Profile, click on the Related Actions Icon to display the menu of Available Actions. Hover over Organization and click on Change Organization Assignments.
2. Review help text and select an **Effective Date**. Click **OK**.

3. Review help text and confirm that the **Chicago HRMS Department** information is correct. If not, please update. Update the default **FAS Account** and **FAS Sub Account numbers** as necessary.

4. The **Affiliated Organization** should only be completed if the position is affiliated with an outside organizations such as Argonne, Fermi Lab or Northshore.

💡 The **Company** will pre-populate as the University of Chicago. This should not be changed. The **Executive** field should not be edited. This field is maintained at the central level.
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5. Click on the Submit Icon to submit this task.

6. You will see that this task has been successfully completed.

[Image: Process Successfully Completed]
Change Organization Assignment for Worker by Organization Steps:

1. From the **Search** box, search for the **Supervisory Organization** for which the **Organization Assignments** need to be changed. Use the related action icon next to the name of the organization, hover over **Organization** and select **Change Organization Assignments**.

2. Enter an **Effective Date** and confirm the desired **Supervisory Organization** is selected.

3. Click **OK**.
4. On the next screen, only click the Select All checkbox if you plan to update the organization assignments for all employees in this supervisory organization with the same information. To update individual positions with the same information, scroll further down the page and ensure the check box in the Assign Organizations column is checked for any position that needs to have assignments updated as shown in Step 6 of this document.

5. Update the Organization Assignment information, including: UChicago HRMS Department, Affiliated Organization, FAS Account and FAS Sub Account. The Executive field should not be edited. This field will be maintained at the central level. The Company field should always indicate the University of Chicago.

6. Select the employees for which you would like to update organization assignment information.
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7. Click on the Submit Icon to submit this task.

8. You will see that this task has been successfully completed.