

UR Financials – Cost Center Request (Add or Change) Form



Date Submitted (MM/DD/YYYY): _____ Action Required: (Add or Change) _____
 Effective Date of Change (MM/DD/YYYY): _____ Company 3-digit Code: CM _____
 Cost Center Name: _____ Cost Center 10-digit Code: CC _____
 Cost Center Manager: _____ Cost Center Procurement Manager: _____
 P2P Initiator: _____ UR Budget Responsible Person _____
 Purpose: _____

Will the Cost Center have sponsored projects? (Yes or No) _____.
 (If yes, the Grant Hierarchy will need to be created by ORACS Business Analyst).
 Grant Financial Analyst Name if applicable: _____
 Require Grant Manager approval on Requisition? (Yes/No/Not applicable) _____
 Equipment Administrator: _____

Approvals:

Requestor (print)	Title	Phone	Signature	Date
Department Head (print)	Title	Phone	Signature	Date
Company Finance Office (print)	Title	Phone	Signature	Date
Central Budget Office (print)	Title	Phone	Signature	Date
ORACs (print)	Title	Phone	Signature	Date
Central Finance Office (print)	Title	Phone	Signature	Date

Central Finance Use Only:

Date Reviewed: _____ Date Available for Use: _____
 COST CENTER Value: _____
 COST CENTER Hierarchies: _____ e-builder: _____
 Additional Notes: _____

Instructions and General Guidelines – Cost Center Request (Add or Change)

This form is to be used when requesting to add a new Cost Center or change an existing Cost Center in UR Financials system. Please follow these general guidelines to expedite your request:

1. Please complete electronically all fields on the form above the “Central Finance Use Only” line
2. Action Requested – indicate whether the request is to:
 - a. Add – add a new Cost Center.
 - b. Change – change an existing Cost Center. Include only the items that you want changed.
3. Effective Date of Change – when transactions should start posting against the Cost Center.
4. Company – the company or division that the COST CENTER is requested for.
5. Cost Center Name – Name of the Cost Center where the charges will be captured
6. 10-digit Cost Center Code – the 2 letter and 5 digit department + 3 digit (Sub dept.). Example (CC17024-XXX).
7. Cost Center Manager – Name of the person who is in charge of this cost center and for approving any journals created by the department’s Accounting Specialist role.
8. Cost Center Procurement Manager – Name of the person who is in charge of the Procurements (P2P).
9. P2P Initiator - this is the person that will initiate “Procure to Pay” transactions. This is generally for the entire cost center or cost center hierarchy.
10. Purpose – Please provide detailed description of activity to be recorded on COST CENTER.
11. UR Budget Responsible Person – This person is the individual that will input the annual budget into the UR Budget system.
12. Will the Cost Center have Sponsored Projects: Please answer “Yes” or “No”. If your answer is “Yes”, the form will need to be routed to the ORACS BA to create a Grant Hierarchy in UR Financial.
13. Grant Financial Analyst Name if applicable: Grant Financial Analyst is a role in UR Financial. This role will be able to perform analytical review related to sponsored projects. Providing the name will assist in contacting the individual regarding access request.
14. Require Grant Manager approval on Requisitions: Cost Centers that have Grants can opt in (**Yes**) or opt out (**No**) for having a Grant Manager approve Requisitions/Change Orders prior to the Principle Investigator approval step. The Grant Manager role is only used on P2P transaction routing and Grant Manager approval is always required on Supplier Invoice Requests (not optional). Grant Manager approval is required on Requisitions/Change Orders for Grants in Cost Centers aligned with Company 11, 24, 30, 60, 70 (**Not applicable**). Contact [Procurement Service Center@rochester.edu](mailto:Procurement.Service.Center@rochester.edu) if clarification or additional information is needed.
15. Equipment administrator: This is the primary person responsible for managing property tags for UR fixed assets and performing the equipment survey within URSpace. Please contact the equipment administrator at equipadmin@Finance.Rochester.edu if clarification or additional information is needed.
16. Approvals - After the form is completed and signed by Requestor and Department Head, the form needs to be approved by Company Finance Office, Central Budget Office, and Central Finance Office.

For questions regarding how to complete this form, please contact generalaccounting@ur.rochester.edu.