



Department ID Inactivation Request Form

Questions about this form should be directed to [Accounting Services](#).

Department ID:
(to inactivate)

Alternate Department ID:
(in-flight transactions)

CU lead Signature: _____

Contact Person: _____

Please refer to the [Departmental Inactivation Flow Chart](#) for department ID inactivation process. No new transactions will be allowed after a department is inactivated.

The following checklist **MUST** be completed before submitting this request to DepartmentChanges@unc.edu:

Complete the [Source Deactivation Checklist](#) for sources no longer used – contact [Accounting Services](#).

[Disbursing Authority](#) must be changed when a source is transferred to another department. Complete the [Source Modification Checklist](#) – contact [Accounting Services](#).

Close all Requisitions. Close fulfilled Purchase Orders (PO). Change outstanding PO to another department ID.

Initiate Add/Update Position and/or Hire ePars to move Positions and all Employees (permanent, temporary, affiliate) out of the department. Tip: Run Infoporte reports on “Employees”, “Positions”, “Payroll”, “Affiliates” tabs, and contact HR representative.

Complete payroll retros (PAAT) and Fund swaps to transfer funding to the new department including MCD's.

Remove department ID and update default funding for Commitment Accounting/Payroll

Update any default strings using the department ID in HR, [Works \(P-CARD\)](#), [DAVIE](#) (gift), [CBM](#), etc.

Update enrollment for student activities of the department. Ensure Student Records/ Registrar/Admissions has an alternate department ID for future activities.

All [OSR projects](#) should be closed prior to department inactivation.

Transfer all fixed assets out of the department – contact [Asset Management Services](#).

Change department ID in data collect batch (DCB). See [DCB Contact Information](#) or contact [Accounting Services](#).

Change department ID for Endowment Income Allocations. Contact [Foundation and Investment Accounting](#).

Change department ID for Capital Improvement funding through [VC F&O SCE](#).

Record campus journals to clean up errors and outstanding receivables and payables in Connect Carolina.

Run Adhoc queries in Connect Carolina to ensure department ID is clear of any financial activities. *Tip: NC_CPS_TB_DETAILS to verify balance sheet and current fund balance is zero.*

Run Infoporte reports to verify department ID is clear of any HR activities.

Record budget transfers / journals to ensure budget matches expenses and budget balance is zero.

Clear departmental approval workflow. Update security access via [ITS](#).

Attach a memo requesting inactivation signed by Department Head, Dean of School, Director or Officer of Organization. The memo should be addressed to University Controller.