New cost center and cost center change request forms are located in PeopleSoft under Employee Self Service.

Cost Center Request Forms

1. **Cost Center Request Form (Non-Grant)** – this request can be used to request all non-sponsored project cost centers:
   - State Funded
   - Designated
   - Auxiliary Enterprises
   - Restricted
   - Restricted Gifts for Research
   - Plant Fund
   - Loan
   - Agency

2. **Grant Cost Center Request Form** – this request can be used to request Sponsored Project and Cost Share cost centers only. This form can only be submitted by OPM (Office of Post Award Management).

3. **Endowment Cost Center Request Form** – this request can be used to request Principal Endowment and Endowment Gift cost centers. This form can only be submitted by Development and Accounting Operations.

4. **Plant Funding Request** – Used to request funding for Maintenance and Operations of Plant, Construction in Progress and other Capital Assets. *This form can only be used by Facilities Management and Accounting Operations.*

Cost Center Change Forms

1. **Attribute & Description Change Request** - used to request changes to descriptions and attributes (Owner, Manager, Alternate) changes for a cost center.

2. **Cost Center Change Request** - used to request chartfield value changes for non-sponsored or plant fund cost centers. Includes (fund code, department or function).

3. **Grant Cost Center Change Request** - used to request chartfield value changes for Sponsored projects and Cost share cost centers only. This request can only be submitted by OPM (Office of Post Award Management) Includes (fund code, department, function, Project or Activity).
4. **Plant Cost Center Change Request** - used to request chartfield value changes for plant funded cost centers only. This request can only be submitted by Plant Accounting. Includes (fund code, department, function, Project or Activity).

**Searching and Filling out Forms**

**Navigation:** Main Menu > Employee Self-Service > Forms > Search/Fill a Form

PeopleSoft provides the capability to Search for a form you have submitted. This can be done on the Find an Existing Values tab. Criteria below can be entered to assist with your search.

![Search Criteria](image)

**Search Criteria**

- **Sequence Number:**
- **Subject:** begins with
- **Form:** begins with
- **Document Key String:** begins with
- **Priority:** =
- **Due Date:** =
- **Approval Status:** =

[Case Sensitive]

Limit the number of results to (up to 300): 300

[Search] [Clear] [Basic Search] [Save Search Criteria]

*Please note: You can ONLY view the forms you have created or approved.*
Searching and Filling out Forms

1. In order to create a form you will need to click on the Add a New Value’s tab.

2. Click on the magnifying glass to view all active forms that can be submitted.
3. Once you select the form you need, click add.

Search/Fill a Form

Form: [NEWCC_REQ]

Add

4. The form will appear for you to fill out

New Cost Center Request Form

*Subject:

Priority: 3-Standard

Status: Initial

*Requester:

*Fiscal Year:

*Date of Request:

*Contact Number:

*Email Address:

*Owner Name:

*Manager Name:

* Alternate Name:

Due Date:

*Long Description:

*Short Description:

*Department:

*Function:

*Fund Group:

*Owner NetID:

*Manager NetID:

*Alternate NetID:

Retain Funding

**Plant Accounting and Office of Post Award Only**

Project ID:

Activity ID:

**Plant Accounting and Systems Administration Only**

Fund Code:

Assigned Cost Center:

More Information:
5. Once the form has been completely filled out, click save. You will have the option to review the form before submitting. Once reviewed click submit.

6. Once submitted, you will be taken directly to the workflow page that displays who the form will route to next. Click ok, and you will be taken back to the form.
7. Once your form is submitted into workflow, a Sequence number is assigned. This Sequence number is only specific to your form and can be used to check the status of your form at any time. This can be done on the “Find an Existing Value” tab of the Search/Fill a Form screen as indicated on page 2.

8. Once your form has been approved, you will receive a confirmation by email.
Approving New Cost center and Change request

Approval notification will be sent via email and added to your worklist.

Email Notification

If you do not want to go to your worklist or click on the email notification link, you can navigate directly to the Approval/Review a Form page. See the navigation below:

Main Menu > Manager Self-Service > Approve/Review a Form

Approval/Review a Form

Enter any information you have and click Search. Leave fields blank for a list of all values.
1. On the “Find an Existing Value” tab, you may search for a specific form indicated by the “Search Criteria”, or click the search button to view the Forms pending your approval. For example, you may search by the Sequence number or the Subject you assigned to your form.

2. Once you click search, click on the form pending approval. The link will immediately take you to the Form approval page.
3. Before you approve, click the “Go to Form” button in order to view the form. Once the form has been reviewed, click approve or deny button in the Approval Action box and make any comments needed.

4. The form will then move to the next approver or route back to the requester if denied.

5. Once the form is approved, the requester receives an email confirmation that their form has been approved.

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Form Approval] Form 80 (ATTRIB_CHG) has been Approved

peoplesoft-fitst@shrd.utsystem.edu

Fri, 3/14/2014 8:55 AM

Subject: Test Workflow 3
Priority: 3
Due Date:
Requester: swe679000-utd

Form 80 (ATTRIB_CHG) has been approved. Details are shown below:

Click on the URL to access the form: https://fi-test.utdallas.edu/psp/UTDST/EMPLOYEE/DRP/c/MANAGE_FORM.FORM_ADD.4GB?
Page=FORM&Action=U&SEQ_NBR=80

[This message was automatically generated by Form and Approval Builder on 2014-03-14 at 08:55:10.000000. Please do not reply to this email.]