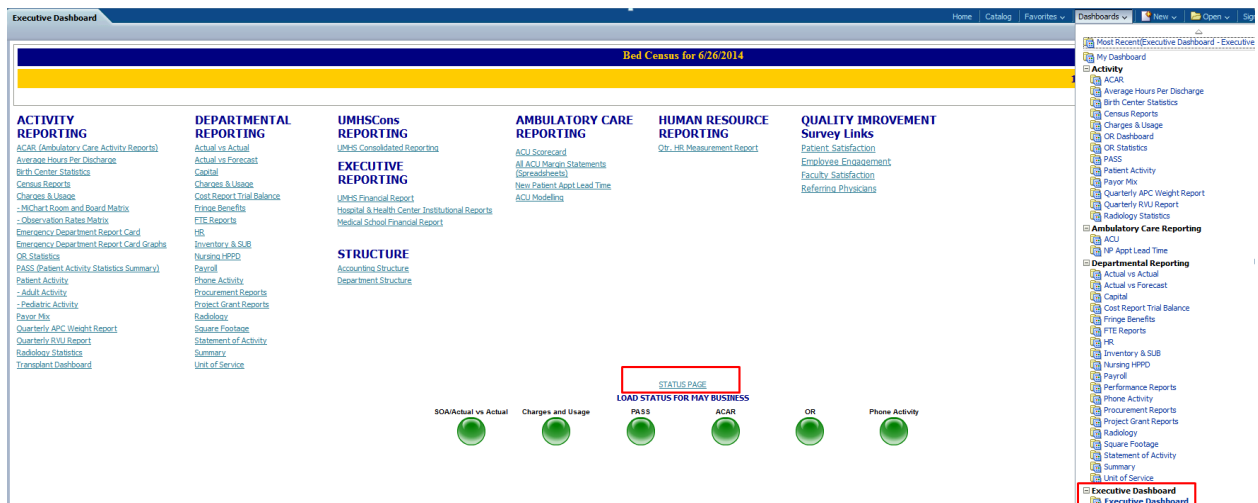


## UMHS Financial Systems – Change Management

### DeptID Mass Update Request Instructions

- The “DeptID Mass Update Template.xlsx” Excel spreadsheet may be used to propose hierarchy updates to UM Health System specific hierarchy fields for one or multiple Department IDs. Hierarchy fields in the UM Health System only hierarchy are as follows:
    - Consolidated Operational Group
    - Operational Group
    - Forecast Level Entry Group (FLEG)
    - Functional Group/ACCG
    - Admin/ACU
    - SubACU
  - Hierarchy changes will be reviewed to determine if the proposed change may be processed in the current month or if the change will need to occur during the annual change cycle. Dept ID realignments to a different FLEG occur only annually. Annual change to FLEG request are due to Financial Systems by October 31<sup>st</sup>. FLEG hierarchy changes will be reflected in the next Forecast Cycle’s hierarchy enabling the next Fiscal Year’s Budget to be set under the new FLEG DepartmentID configuratin. Budget and acutals under this new FLEG configuration will be reported in the next fiscal year’s hiearchy (July 1). This timing ensures budget and actual are aligned hierarchically.
1. To access the “DeptID Mass Update Template” log into UMHS Data Mart and navigate to the Executive Dashboard. Select STATUS PAGE and then FinOps DeptID Mass Update Template



## UMHS Financial Systems – Change Management

### DeptID Mass Update Request Instructions

- Navigate to “UMHS Financial Systems Change Management” tab and click into the tab. The current Department ID hierarchy will load. Existing hierarchy will be in the white columns & the blue columns will hold the updated hierarchy being requested. To select the hierarchy you are interested in updating go to the lower scroll bar and pull the scroll bar to the right to display the hierarchy fields. You can filter on any hierarchy field. Once the data has been filtered down to the dept ids you are interested in updating go to the bottom of the spreadsheet (above the scroll bar) and pull the scroll bar over until the export option appears on the screen. Export the spreadsheet, update the hierarchy fields (blue columns) with your updated data and send the completed spreadsheet in an email to [UMHSFinancialSystems@med.umich.edu](mailto:UMHSFinancialSystems@med.umich.edu)

UMHS Financial Systems

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Advance

Status

Status All Web Forms Links **UMHS Financial Systems Change Management** FinOps DeptID Mass Update Template

Fiscal Year: 2015 Entity: --Select Value-- Segment: (All Column Value) Consolidated Operational Group: (All Column Value) Operational Group: (All Column Value) Functional Group/ACCG: (All Column Value) Admin/ACU: (All Column Value) FCAST I: --Select

OPERATIONAL_GROUP	NEW_OPERATIONAL_GROUP	FUNC_GROUP_ACCG	NEW_FUNC_GROUP_ACCG	ADMIN_ACU	NEW_ADMIN_ACU	SUB_ACU	NEW_SUB_ACU	HHC
HS Shared Services		UMHS Shared Services		UMHS Shared Services				
YMA/Predhter Research		EVPMA/Predhter Research Fund		EVPMA/Predhter Research Fund				
YMA/Brehm Research Fund		EVPMA/Brehm Research Fund		EVPMA/Brehm Research Fund				
Other Related Hosp Activities		Other Related Hosp Activities		Other Related Hosp Activities				
Respiratory Care Develop/Timg		Respiratory Care Develop/Timg		Respiratory Care Develop/Timg				
Survival Riskt Memorial Fund		Survival Riskt Memorial		Survival Riskt Memorial				

Export

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