



# Planning and Budgeting Brief

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Date Prepared: May 14, 2009

Subject: **Organization Code Additions/Changes**

This brief provides guidelines for setting up, changing or closing organization (“org”) codes.

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## Setting up new organization codes

To request a new org code, please fill out the [Organization Code Request Form](#) and send it to [orgcode@u.washington.edu](mailto:orgcode@u.washington.edu).

## Changes to organization codes

To request changes to an existing org code (e.g., name, purge flag or box number), please fill out the [Organization Code Change Form](#) and send it to [orgcode@u.washington.edu](mailto:orgcode@u.washington.edu).

Purge flags indicate whether budgets can be attached to an org code, or whether the org code is set to be purged at the end of the biennium.

Flag 1 = Org code is closed and will be purged at biennium end (see “Closing of organization codes,” below)

Flag 2 = Budgets can not be attached to org code, but org code is active and will not be purged at biennium end

## Closing of organization codes

To close an org code (i.e. set purge flag to “1”), please fill out the [Organization Code Change Form](#) and send it to [orgcode@u.washington.edu](mailto:orgcode@u.washington.edu). Please ensure the following requirements are met before making your request:

- Org code is level 5 (division) or level 6 (subdivision). Org codes at level 4 (department) and above are established and approved by the Regents
  - Org code does not have budgets attached to it
  - Org code is not a “parent” (i.e. a higher-level org code in relation to other active org codes)
  - Org code is not active in any other offices/systems (SIMS, payroll, procurement, equipment inventory and/or insurance)
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Questions or issues concerning these guidelines should be sent to [orgcode@u.washington.edu](mailto:orgcode@u.washington.edu).