

## Financial Services Support Center

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**From:** Financial Services Support Center  
**Sent:** Tuesday, October 26, 2021 1:32 PM  
**To:** FISCAL\_AGENT-L@LIST.UNM.EDU  
**Subject:** A NEW ORG CODE REQUEST APPLICATION IS HERE!

Hello Fiscal Agents,

In our continued efforts to provide Departments with user friendly tools and streamline processes, Financial Services has created a new application to request New Organization Codes or Edits to existing Organization Codes in Banner Finance. **The application is now open for business** on the FSSC website @ <http://fssc.unm.edu/resources.html>.

**Please share this information with your departments and users who request new org codes.** Please take some time to get familiar with the intentional information provided on each screen. The new application provides more validations and prompts from field to field so a job aid is not needed.

### What does this mean for Banner Authorization Request security?

- Department General Inquiry is required to access the new application.
- The Department COA role is not required to access the new application.

### Access to the application:

- All users must be active employees with Banner Finance access to get into the app.
- The new application does NOT work with Internet Explorer
- The current Formstack process will be demised on 10/29/2021.

### Application Navigation:

- Take note of the guidance prompts by clicking/hovering on the ? (question mark) in each section.
- Org Code Request
  - Used to submit requests for New or Edits to existing org codes
    - Financial Manager Info - First Name / Last Name fields must be an exact match to populate the "Select Banner ID" field.
    - If Financial Manager "Select Banner ID" field does not populate, then the person is not an active employee and the request cannot be submitted.
    - Once you select the Financial Manager, you will see all org codes that are set up with that person as the Financial Manager. This is intended to assure departments do not set up duplicate org codes.
- Principle Investigator Info (PI)
  - Person responsible for all activity on the restricted award.
  - PI's name must be included in the org code title.
- Request Status
  - Use this to view status of your request(s) .
- Org Hierarchy (Active Org Only)
  - Use this to view all active UNM Org Codes under your level 3.
  - Users should be familiar with their Department/Division Org Hierarchy before submitting requests for new Org Codes.
  - This was built for you and your departments to show the parent levels and understand the org structure under your level 3. The filters and text query ability are awesome!

If you have any questions, please send an email to [fssc@unm.edu](mailto:fssc@unm.edu).

Thank you,  
Financial Services  
[fssc@unm.edu](mailto:fssc@unm.edu)  
<http://fssc.unm.edu>