FI eFORMS: Approve Cost Center/Fund Center Request

The change cost center/fund center feature in UCFlex allows users to initiate a request to make a change to specific components of an existing cost center/fund center. The eForm allows a user to initiate a change for a single cost center/fund center or multiple cost centers/fund centers within one form. Once submitted, the form routes to an approver for review and approval. This reference guide reviews how to approve a request to create or change a cost center/fund center.

Roles

To initiate a request, a user must have the following role in UCFlex.

FI Workflow Initiator E-Forms

To approve a request, a user must have the following role in UCFlex along with a position to cost center relationship:

FI Workflow Approver E-Forms

There are two (2) types of decentral approvers, however, the workflow only allows for one decentral approval per form.

- **College/Division (Col/Div):** allows approval based on the first three (3) digits of the cost center
  - Please note there are a few exceptions to the first three rule (Col/Div: 002, 004, 005, 006, 007). For questions regarding the col/div exceptions, contact the Controller’s Office.

- **Department** allows approval based on the first five (5) digits of the cost center.

Workflow

![Workflow Diagram]

Approving a Request to Create or Change a Cost Center/Fund Center

Items for approval will appear in the approver’s **Universal Worklist (UWL).**

1. Log into UCFlex and click on the **MSS** tab (see Figure 1)

2. Select **Overview** to review items in the Universal Worklist (see Figure 1)

3. Refresh list by clicking the refresh icon

![Figure 1]
4. In the **subject** column of the **UWL**, find the document to approve
   - Request for a new cost center/fund center will have the subject line – “Request to create Cost Center, Document No.: XXXXXX”
   - Request to change a cost center/fund center will have the subject line – “Request to change Cost Center, Document No.: XXXXXX”

5. Click the link in the **subject** column to open the form
   - Review information
   - To Approve the form, click **Approve Document**
     - Document is routed to the Controller’s office for review and approval
   - To Return the form to the Initiator, enter a comment indicating why the form is being returned
     - Click **Return Document**
     - Document is returned to the initiator’s UWL to review and resubmit; Initiator receives notification
   - To Reject the form, enter a comment indicating why the form is being rejected
     - Click **Reject Document**
     - Document is deleted; Initiator receives email notification