



Driver Request Form to Edit/Move/Inactivate

This form is used to Edit, Move, or Inactivate a Driver (Program/Project/Gift/Grant) in Workday.

All areas of the form must be completed. This form must be submitted to the respective Central Offices. The Office of Financial Planning and Analysis will receive all Gables/RSMAS requests and Medical Finance will receive all UHealth and MSOM requests. In addition, all requests must be approved by the Controller's Office.

- Approvals should be obtained in the following order.

Required Approvals	
1	Department Senior Business Manager
2	Medical Finance* Email: medfinbudget@miami.edu
3	University Financial Planning and Analysis Email: financialplanning@miami.edu
4	Controller's Office Email: ControllersGeneralAccounting@miami.edu

*UHealth/MSOM Only

The Controller's Office should forward the approved request form to help@miami.edu and an incident will be created and routed to the EBS Operations Team to make the necessary system changes.

Checklist		
1.	Have the Drivers been in use in the current Fiscal Year? <ul style="list-style-type: none"> Moving a driver is <i>prospective</i> – past transactions will not move with the driver 	Yes <input type="checkbox"/> No <input type="checkbox"/>
2.	Are there any balances remaining in the P&L (surplus/deficit) or Balance Sheet (Net Assets aka Balance Forward)? <ul style="list-style-type: none"> Journal entries should be made to transfer balances prior to inactivating a driver When moving a driver to a new CC any balance forward will remain in the original cost center unless transferred through a journal entry 	Yes <input type="checkbox"/> No <input type="checkbox"/>
3.	Are there any costing allocations associated with the driver that is being moved? <ul style="list-style-type: none"> If YES, you must update the costing allocation to reflect the changes prior to this request 	Yes <input type="checkbox"/> No <input type="checkbox"/>
4.	Are there any costing allocations associated with the driver that is being inactivated? <ul style="list-style-type: none"> If YES, you must update the costing allocation to reflect the changes prior to this request 	Yes <input type="checkbox"/> No <input type="checkbox"/>
5.	Are there any Assets to be transferred? <ul style="list-style-type: none"> If YES, please contact Property Accounting and inform them of the new driver 	Yes <input type="checkbox"/> No <input type="checkbox"/>
6.	Are there open PO's or invoices to be paid against the impacted Drivers? <ul style="list-style-type: none"> If YES, Pay invoices, and then close the PO's prior to this request 	Yes <input type="checkbox"/> No <input type="checkbox"/>
7.	Is there an Internal Service Provider Associated (ISP) associated with this driver? <ul style="list-style-type: none"> If YES please contact Lionel Vera (Lvera@miami.edu) to update ISP information 	Yes <input type="checkbox"/> No <input type="checkbox"/>
8.	Are there any monthly allocations? **FOR EBS USE ONLY**	Yes <input type="checkbox"/> No <input type="checkbox"/>



Requestor	
Name:	UMID:
Phone:	E-Mail:
SECTION A: Edit Driver Name	
Current Driver Name:	
Proposed Driver Name:	
Reason for Edit:	Effective Date:
SECTION B: Move Driver	
Current Cost Center:	Proposed Cost Center:
Business Justification:	
SECTION C: Inactivate Driver	
Driver Name:	
Effective Date:	
Reason for Inactivation:	
Note:	

Required Approvals		
1	Department Senior Business Manager	
Print Name:	Sign:	Date:
2	Medical Finance (UHealth/MSOM Only)	
Print Name:	Sign:	Date:
3	University Financial Planning and Analysis	
Print Name:	Sign:	Date:
4	Controller's Office	
Print Name:	Sign:	Date: