## Financials Change Request Form

<table>
<thead>
<tr>
<th>Approved Date</th>
<th>Request #</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Related Business Process

(Description of Business Process)  
(Compliance/Regulatory*  
Custom Report  
Enhancement  
Implement New Functionality  
Policy Change  
Process Change

*Compliance/Regulatory  
(Describe compliance/regulatory requirements, if applicable.)

### Component(s) Affected

- Accounts Payable
- Accounts Receivable/Billing
- Asset Management
- Budgets/Commitment Control
- Expenses
- General Ledger
- Grants Management/Contracts
- Inventory
- Purchasing
- Cross Applications (specify)

- CRR/ARR
- JE/PCE/ISE/CE/TRE
- Other (specify) ____________
- Web Apps Security
- PS Financial Reports/Web Applications
- Other Reports (specify)

### Submitted By

(Enter the Business Process Team)  
(Date Prepared)

### Functional Sponsor

(Business process champion for testing, sign off and addressing questions on change request)

### Timing/Duration

(Describe when change is needed and whether the change is temporary or permanent)

### Business Process Team Ranking

(Assign a team ranking of the change request on a scale of 1 to 5 with 1 being high and 5 being low)

### Summary Statement

(Provide a brief summary of the issue or concern that needs to be addressed)

### Context

Is PeopleSoft aware of the problem? _____

Will the problem be fixed in future patches/releases/upgrades? _____

Does a work around already exist? _____  
(If yes, explain in Solutions Considered section)
### Business Case for Change

The business case should substantiate the impact of the requested change. What is the business case of the requested change? Consider how the change contributes to the University’s missions of research, teaching and service. Why is it important relative to other changes that have been considered by your Business Process Team? Explain measures of impact such as number of employees affected across the System, net resources (hours/dollars) saved, user satisfaction, etc.

### Solutions Considered (as many as are applicable – e.g. work around, do nothing, modification, process change, policy change, etc.)

<table>
<thead>
<tr>
<th>Solution</th>
<th>Description</th>
<th>Pros</th>
<th>Cons</th>
</tr>
</thead>
<tbody>
<tr>
<td>Solution 1</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Description</td>
<td>Pros:</td>
<td>Cons:</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Solution 2</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Description</td>
<td>Pros:</td>
<td>Cons:</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Solution 3</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Description</td>
<td>Pros:</td>
<td>Cons:</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Recommended Solution**
Design Narrative for Recommended Solution

Provide a design overview including steps necessary to transition to new processes and procedures. Address all relevant facets of the solution e.g., policy changes, responsibilities, frequency, dependencies, security, interfaces, reports, configuration, maintenance, cross-module/application considerations, and technology/architecture concerns.
(a more thorough design may be requested upon approval)

Estimated Resources**

The estimated hours required for designing, testing, implementation and training for the modification:

<table>
<thead>
<tr>
<th>Estimated # of Hours</th>
<th>Technical Development</th>
<th>Functional Development</th>
<th>Testing</th>
<th>Training</th>
<th>Total Hours:</th>
</tr>
</thead>
</table>

**Functional and technical leads over the related business process should be utilized in preparing the business case, design narrative, and estimated resources sections as they will be primarily responsible for providing the eventual detail specifications of the modification and for its execution.