

## Cost Center Request - Detail Guide

### Introduction

The Cost Center Request form is used for cost center creation, change and inactivation. The form is accessible via the Gemini for Departments or directly from the navigation menu.

**Tile:** Gemini for Departments (homepage) > Forms (tile) > Cost Centers > Cost Center Request

**Menu:** Gemini FMS > Employee Self-Service > Forms > Cost Center Request

To submit a request, click the “Add a New Value” tab and select Request Type.

**Cost Center Request**  
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value | Add a New Value

▼ Search Criteria

Request ID: begins with [ ]

Date Submitted: = [ ]

Date Created: = [ ]

Status: = [ ]

Request Type: = [ ]

Requester: begins with [ ]

Assigned Userid: begins with [ ]

Assigned Name: begins with [ ]

My Assignments:

Assigned User List: begins with [ ]

Include History  Correct History  Case Sensitive

**Cost Center Request**

Request Type: [ ]

\*Reason for Request: Add Cost Center, Change Cost Center, Inactivate Cost Center

\*Subject: [ ]

If you need assistance with Chartfield Values, please visit the [Chartfield Values Reference Tool](#).

### Add Cost Center

To request Endowment, Grant and Plant fund cost centers, please contact the respective teams. They will review your request and submit the appropriate form on your behalf.

- Endowment/EEF/EOF – Endowment team in the Office of Development
- Grant/Cost-share – OPM (Office of Post Award Management)
- Plant – Accounting and Financial Reporting

For all other cost centers, please select Cost Center Type “Standard – All Other CC Types.”

Provide reason for request and subject. The Subject line is a short summary of the request. The Effective Date field is optional: in most cases it is the beginning of the current fiscal year.

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### Cost Center Request

Request Type

Cost Center Type  Change this for special CC types only

\*Reason for Request

\*Subject

Effective Date

For supporting document requirements and additional instructions, please click [here](#).

Some cost center requests need specific supporting documents. To check the requirements, visit <https://finance.utdallas.edu/managing-departmental-finances/cost-center-maintenance>.

Explain how the new cost center will be funded. If you know the cost center number from which the funds will be transferred, please specify in the Funding Cost Center field.

\*Funding Source: Please provide information regarding how this cost center will be funded below.

Funding Cost Center

Provide the Long and Short Descriptions of the cost center. Please note, some cost centers have specific naming conventions depending on fund type.

#### Description

\*Long Description

\*Short Description

Select Department, Fund Code and Function. If you have questions about the appropriate fund code or function to use, please consult your Fiscal Officer. Additional clarification may be requested from the Budget Office and Accounting & Financial Reporting Office.

#### Chartfield Values

\*Department

\*Fund Code

\*Function

Project

Activity ID

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Use the magnifying glass icons to look up owner, manager, alternate attributes. If the person is not available on the list, please contact [systemadministration@utdallas.edu](mailto:systemadministration@utdallas.edu) to have them added.

If users other than the owner, manager, alternate need access to this cost center, provide their names and netIDs in the Additional Information box.

If a Function Code of 2XX is selected, the additional attribute Field of Study will appear.

### Attribute

*Owner	<input type="text"/>	Q
*Manager	<input type="text"/>	Q
*Alternate	<input type="text"/>	Q
*Field of Study	<input type="text"/>	Q

Submitter information is automatically populated, but you have the option to add a secondary contact.

▼ Submitter/Contact Information	
Entered By	
Name	<input type="text"/>
Phone	<input type="text"/>
Email	<input type="text"/>
Secondary Contact	
Name	<input type="text"/>
Phone	<input type="text"/>
Email	<input type="text"/>

Attachments may be added only after the request form has been saved. You can browse files and upload by clicking the Attach icon. To add more files, click the plus button.

▼ Attachments				
Description	Attached File	Attached By	Date/Time	Attach
<input type="text"/>				 

Save and submit the form.

To make changes to the form after submittal, you have to click the “Call Back” button, edit form and resubmit.

### **Change Cost Center**


To request changes to existing Endowment, Grant and Plant fund cost centers, please contact the respective teams. They will review your request and submit the form on your behalf.

- Endowment/EEF/EOF – Endowment team in the Office of Development
- Grant/Cost-share – OPM (Office of Post Award Management)
- Plant – Accounting and Financial Reporting

Provide reason for the cost center change in the Reason for Request field. The Subject line is a short summary of the request.

If effective date is not specified, beginning of current fiscal year will be assumed, for ease of budget and balance cleanup. Forms submitted after July 1st will be processed for the following fiscal year.

**Cost Center Request**  
Request Type   
\*Reason for Request   
\*Subject   
Effective Date   
For supporting document requirements and additional instructions, please click [here](#).

Select the cost center to change by using the lookup icon . When a valid cost center is selected, its current descriptions, attributes, and ChartFields are populated.

Change the proposed values where applicable.

- If you are requesting cost center description or attribute (owner/manager/alternate) changes only, you may submit one form per department with a spreadsheet attached for multiple changes.
- For ChartField (department/fund code/function) changes, please submit one form per cost center.

Please note, some cost centers have specific naming conventions depending on fund type. If the attribute (owner/manager/alternate) is not available on the list, please contact [systemadministration@utdallas.edu](mailto:systemadministration@utdallas.edu) to have them added.

Please note that an additional attribute Field of Study will be required for Cost Centers with a 2XX Function Code.

If users other than the owner, manager, alternate need access to this cost center, provide their names and netIDs in the Additional Information box.

Submitter information is automatically populated, but you have the option to add a secondary contact.

Attachments may be added only after the request form has been saved. You can browse files and upload by clicking the Attach icon. To add more files, click the plus button.

Save and submit the form.

To make changes to the form after submittal, you have to click the “Call Back” button, edit form and resubmit.

### ***Inactivate Cost Center***

If you are requesting inactivation of multiple cost centers, all of the listed cost centers must belong to the same department and fund code. Sponsored project (grant) cost centers are inactivated according to the terms and conditions of the award.

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Before requesting a cost center to be inactivated, please consult your Fiscal Officer. Additional clarification may be requested from the Budget Office and Accounting & Financial Reporting Office.

If you are intending to use the cost center in the future for the same purpose, it should not be inactivated.



Request Type: Inactivate Cost Center (dropdown)

\*Reason for Request: [Text input field]

\*Subject: [Text input field]

Provide reason for the inactivation request on the Reason for Request field. The Subject line is a short summary of the request.

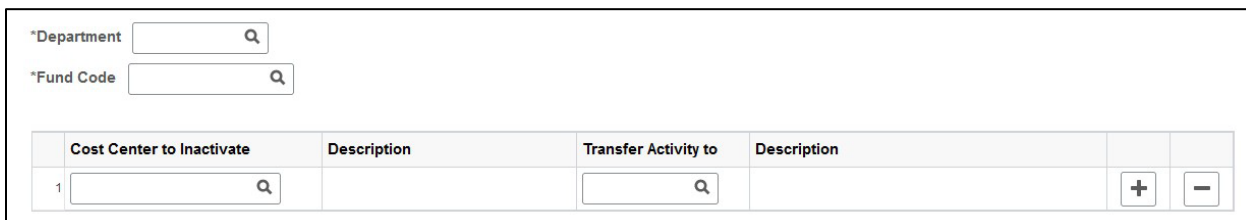
Select Department and Fund Code.

Select the cost center(s) to inactivate. Only cost centers that match the above department and fund code will be available for selection.

- To look up the department/fund code for the cost center(s) to inactivate, go to Gemini for Departments (homepage) > Reporting Tools (tile) > UTD Reporting Console > Cost Center Related > Cost Center Information report.

If there is budget/balance to clear from the cost center, please provide the cost center number to which the activities should be moved.

Click the plus button to add more cost centers to the inactivation list.



\*Department: [Search field]

\*Fund Code: [Search field]

	Cost Center to Inactivate	Description	Transfer Activity to	Description		
1	[Search field]		[Search field]		+	-

Submitter information is automatically populated, but you have the option to add a secondary contact.

Attachments may be added only after the request form has been saved. You can browse files and upload by clicking the Attach icon. To add more files, click the plus button.

Save and submit the form.

To make changes to the form after submittal, you have to click the "Call Back" button, edit form and resubmit.