

**Finance Policies and Procedures**

		<b>AUTHORITY</b>		
<b>Federal</b>	<b>State Statutes</b>	<b>La. Admin Code</b>	<b>LSU-HSC</b>	<b>HCS D</b>

<b>CITATION:</b>		
<b>POLICY NAME:</b>		HCS D PeopleSoft Department Request Procedure
<b>PURPOSE:</b>		This procedure is established to organize the requests to add or revise PeopleSoft departments at either the Share SetID level (all campuses) or those relating to any particular HCS D business unit

<b>RESPONSIBLE PERSON</b>	<b>ACTION STEPS</b>
Business Unit Employee	1. Submit the <i>Department Request Form</i> (DRF) to the business unit Chief Financial Officer (CFO) or designee <sup>1</sup> for approval. The form is available on the HCS D Finance Division Website at: <a href="http://www.lsuhs.org/finance/GL/DepartmentRequestForm.xls">http://www.lsuhs.org/finance/GL/DepartmentRequestForm.xls</a> .
BU CFO or Designee	2. Submit the approved DRF to the Health Care Services Division (HCS D) Comptroller or designee <sup>2</sup> .
HCS D Comptroller	3. The HCS D Comptroller will advise the requester whether the request is approval or unapproved.  4. For approved requests, the HCS D Comptroller will determine subsequent action needed.

<sup>1</sup> CFO or designee hereafter will be referred to as CFO.

<sup>2</sup> HCS D Comptroller or designee hereafter will be referred to as HCS D Comptroller.

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### **New Department:**

- a) The HCSD Comptroller will request approval from LSUHSC Shreveport (LSUSH) and LSUHSC New Orleans (LSUNO) PS FIN campus designees and chart field revision and PS Tree revision from the PS Financials Functional Support (PSFFS) team. Requests for new departments will include:
  - i. Suggested department number (7 characters – See Appendix 1.)
  - ii. Short description (10 characters)
  - iii. Long description (30 characters)
- b) For requests that involve **patient charges**, the Patient Financial Services (PFS) liaison will be advised of the request and, if necessary, consulted with on the assigned department number.
- d) For requests for departments where **purchase orders** (PO's) will be cut, the addition of a location in PS will be requested from the PeopleSoft Financials Workflow (PS FIN Workflow) team. A separate location is needed for each department for each business unit.
- e) For requests for departments to which **staff** will be assigned, the HCSD Comptroller will advise the requester of the need to have the applicable HR Liaison process a separate HR request on the HR Change Form. The HR Change form, instructions and sample are located at: <http://www.lsuhs hospitals.org/finance/GL/HRChangeForm.htm>
- e) Once approved by PS FIN designees, the HCSD Comptroller will submit the requested changes to PSFFS and will copy the following:
  - i. HCSD Assistant Comptroller
  - ii. HCSD Accounting Services
  - iii. HCSD Decision Support
  - iv. HCSD Financial Reporting
  - v. HCSD Cost Reporting
  - vi. HCSD Budget Office
  - vii. Business Unit CFO
  - viii. Requester
  - ix. If applicable, PFS Liaison
  - x. If applicable, PS FIN Workflow team
  - xi. If applicable, PS HR Support team

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### Revised Department:

- a) The HCSD Comptroller will request approval from LSUHSC Shreveport (LSUSH) and LSUHSC New Orleans (LSUNO) PS FIN campus designees and chart field revision from the PSFFS team. The revised name and/or tree revision will be specified in the request.
- b) For requests that involve **patient charges**, the Patient Financial Services (PFS) liaison will be advised of the request and, if necessary, consulted with on the assigned department number.
- c) For requests for departments where **purchase orders** (PO's) will be cut, the addition of a location in PS will be requested from the PeopleSoft Financials Workflow (PS FIN Workflow) team. A separate location is needed for each department for each business unit.
- d) For requests for departments to which **staff** will be assigned, the HCSD Comptroller will advise the requester of the need to have the applicable HR Liaison process a separate HR request on the HR Change Form. The HR Change form, instructions and sample are located at: <http://www.lsuhs hospitals.org/finance/GL/HRChangeForm.htm>
- e) Once approved, the HCSD Comptroller will submit the requested changes to PSFFS and will copy the following:
  - i. HCSD Assistant Comptroller
  - ii. HCSD Accounting Services
  - iii. HCSD Decision Support
  - iv. HCSD Financial Reporting
  - v. HCSD Cost Reporting
  - vi. HCSD Budget Office
  - vii. Business Unit CFO
  - viii. Requester
  - ix. If applicable, PFS Liaison
  - x. If applicable, PS FIN Workflow team
  - xi. If applicable, PS HR Support team

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### Existing Department:

- a) The HCSD Comptroller will request chart field revision from the PSFFS team. The request will specify the PS Trees(s) to be revised.
- b) For requests that involve **patient charges**, the Patient Financial Services (PFS) liaison will be advised of the request and, if necessary, consulted with on the assigned department number.
- c) For requests for departments where **purchase orders** (PO's) will be cut, the addition of a location in PS will be requested from the PeopleSoft Financials Workflow (PS FIN Workflow) team. A separate location is needed for each department for each business unit.
- d) For requests for departments to which **staff** will be assigned, the HCSD Comptroller will ask the PeopleSoft Human Resources (PS HR) Support team if the department exists on the PS HR tree.
  - i. If it does, no further action is needed.
  - ii. If it does not, the HCSD Comptroller will advise the requester of the need to have the applicable HR Liaison process a separate HR request on the HR Change Form. The HR Change form, instructions and sample are located at:  
<http://www.lsuhs hospitals.org/finance/GL/HRChangeForm.htm>
- e) Once approved, the HCSD Comptroller will submit the requested changes to PSFFS and will copy the following:
  - i. HCSD Assistant Comptroller
  - ii. HCSD Accounting Services
  - iii. HCSD Decision Support
  - iv. HCSD Financial Reporting
  - v. HCSD Cost Reporting
  - vi. HCSD Budget Office
  - vii. Business Unit CFO
  - viii. Requester
  - ix. If applicable, PFS Liaison
  - x. If applicable, PS FIN Workflow team
  - xi. If applicable, PS HR Support team

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<p>PS FIN FUNCTIONAL SUPPORT</p>	<p>5. Once approved, PSFFS will modify the PS Chartfield and the appropriate PS trees as needed. Location of a new department on the DEPTROLLUP tree will be according to the Department numbering scheme (See attached.) unless advised otherwise. 6. PSFFS will notify the Comptroller and all persons included by the HCSD Comptroller in the request (see #4 above) of the action taken on the request. For new departments to the PS Chart Field, the notice will include the assigned department number, the short description and the long description.</p>
<p>Cost Report Liaison</p>	<p>7. The Cost Reporting Liaison will advise PSFFS whether the new department needs to be added to the Cost Report Tree and if so, the location on the tree.</p>
<p>PFS Liaison  BU CDM Coordinator</p>	<p>8. The PFS liaison will work with the Requester and the hospital's CDM Coordinator to determine and implement the action necessary in the Patient Accounting Chart Fields. 9. The PFS liaison will notify the HCSD Comptroller, the Requester and the hospital CDM Coordinator of the action taken.</p>
<p>PS Workflow Team</p>	<p>10. The PS Workflow team will add locations to PS as needed. 11. The PS Workflow team will notify the Comptroller and all persons included by the HCSD Comptroller in the request (see #4 above) of the action taken on the request.</p>
<p>PS HR Support</p>	<p>12. The PS HR Support team will advise the HCSD Comptroller whether the department is on the HR tree for the requesting business unit. 13. In cases where the department is not included on the HR tree, the PS HR Support team will process any subsequent request to add or modify the department on the HR Tree. <i>This action should not be finalized until the Finance request has been completed by PSFFS to ensure consistent naming between HR and Finance systems.</i> 14. Once completed, the PS HR Support team will notify the Comptroller and all persons included by the HCSD Comptroller in the request (see #4 above) of the action taken on the request.</p>
<p>Business Unit Employee  CFO</p>	<p>15. Where necessary, the affected business unit must create organization-level budgets for all account category/department combinations to be used in Fund 111 and zero budgets in Funds 113, 115 and 116. Organization-level budgets are not needed for accrual funds.</p>
<p>HCSD Fin Rptg</p>	<p>16. When a new department is added to the PS Chart Fields, the HCSD Financial Reporting liaison will add the department to the Combo Edit Rule.</p>

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### Appendix 1: HCSD PeopleSoft Department Request Procedure

#### PEOPLESOFT DEPARTMENT NUMBERING SCHEME

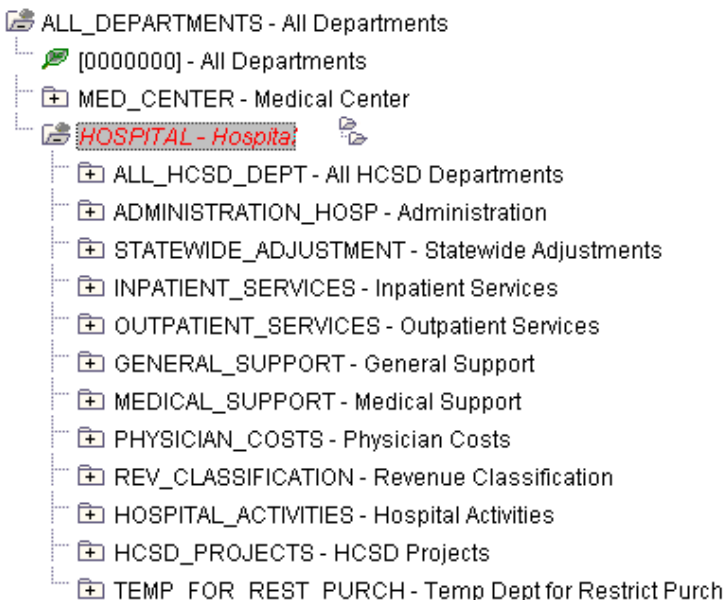
PeopleSoft Departments for HCSD were originally set up according to the scheme listed below. Assignment of new numbers should conform to this scheme to the greatest extent possible and like activities should be grouped together. Intervals of spacing should be used to allow for internal expansion.

7 characters beginning as follows:

- 201 – Administration
- 202 – Statewide Adjustments
- 203 – Inpatient Services
- 204 – Outpatient Services
- 205 – General Support
- 206 – Medical Support
- 207 – Physician Costs
- 208 – Revenue Classification
- 209 – Hospital Activities (i.e., contractual allowances, patient payments, bad debt)
- 210 – Projects

#### Corresponding Department Rollup Tree Structure

Before a department can be used in PeopleSoft, it must be added to the Department Rollup Tree. Placement of a new Department Rollup Tree aligns with the numbering schema described above.



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### Appendix 2: HCSD PeopleSoft Department Request Procedure

#### INDEX OF REFERENCED ABBREVIATIONS AND CONTACTS

CDM – Charge Description Master  
CFO - Chief Financial Officer  
DRF - Department Request Form  
HCSD – Health Care Services Division  
HR – Human Resources  
LSUNO – LSU Health Services Center in New Orleans  
LSUSH – LSU Health Services Center in Shreveport  
PFS – Patient Financial Services  
PS - PeopleSoft  
PS FIN Workflow – PeopleSoft Financials Workflow  
PSFFS – PeopleSoft Financials Functional Support

#### HCSD PeopleSoft Department Request Procedure Contacts at 1/5/09

##### CDM Coordinators::

EKLMC – Denise Dunn  
HCSDA – Simone Clark  
Lynn Mitchell  
LAKMC – Sean Vining  
LJCMC – Jane Dumond  
MCLNO – Sandy Drexel  
UMCLA – Carolyn Gustafson  
WOMMC – Elizabeth Russell  
WSTMC – Judy Jenkins

##### CFO's:

EKLMC – Sue Tolbert  
HCSDA – Clay Dunaway  
LAKMC – Chad Thompson  
LJCMC – Liz Callais  
MCLNO – Roseanne Townsend  
UMCLA – Karen Gardiner  
WOMMC – Ranelda Benoit  
WSTMC – Brooke Cummings

HCSD Asst. Comptroller – Tara Leblanc

HCSD Accounting Services – Donniss Loper

HCSD Decision Support – HQ DSS Support

HCSD Budget Office – Nona Westmoreland

HCSD Comptroller - Judy Albin

HCSD Cost Reporting – Lillian Laws

HCSD Financial Reporting – Mark Robichaux

HR Liaisons and HR 2-letter code:

EL – EKLMC	Amelia Georgetown
HQ – HCSDA	Kathy Townsend
LK – LAKMC	Diane Rose
LC – LJCMC	Gina Marcel
MC – MCLNO	Geri Jones
UM – UMCLA	Malinda Winn
WM – WOMMC	Sharon Powell
WS – WSTMC	Christi Brown

## **Finance Policies and Procedures**

PSFFS – [Steve White](#), [Michele Gonzales](#), [Victoria Stasinskaya](#)  
PFS – [Diane Dean](#)