The Deactivate Financial Orgs team met to define a new process and create guidelines for an annual review of Finance Orgs in order to deactivate inactive accounts prior to the annual ‘Financial Verification Responsibility’ notifications. Current procedures relating to Finance Orgs maintenance were reviewed. The team created a streamline process that eliminated several unnecessary steps, eliminated irrelevant notifications, communications, reminders and reduced unnecessary administrative maintenance of these organizations in Banner Finance and HR.

**Annual Inactivate Org Report:**
- Identify orgs that have been inactive for two years
- Indicate employees of record on the accounts who are not currently employed
- Automated email notifications
- Annual review will be held in the month of February
- Validation and updates will be made prior to ‘Financial Verification Responsibility’ notifications

**Organization Code Request Form:**
- Created a new web base submission form
- Simplified information requested
- Add option to ‘Reactivate’ an org

**Roles and Responsibilities:**
- Role of responsibility changed from Information Technology to the appropriate owner, Financial Accounting
- Add HR Records in order to change timekeeping orgs associated on the list
- Added review for any orgs with Fixed Asset records associated
- Information Technology staff will only update Banner forms and not complete the initial review and distribution

**Communication:**
- Information will be shared with the Focus on Finance and HR Partners meetings
- Automatically verifies state Eligibility Verification Entitlement Act (EVEA) for employee, spouse/dependents taking UofM courses
- Validates age eligibility for exemptions that have age requirements

**Metrics:**
- Information Technology:
  - 2016 estimated 175 orgs were reviewed and deactivated systematically, 189 hours of staff time
  - Reduced time from 1 hour per org to 10 minutes, time to inactivate in Banner: time savings of 146 hours
  - Automated report generation and email distribution: time savings 1 hour
  - Total staff time savings = 147 hours annually