Financials 9.1

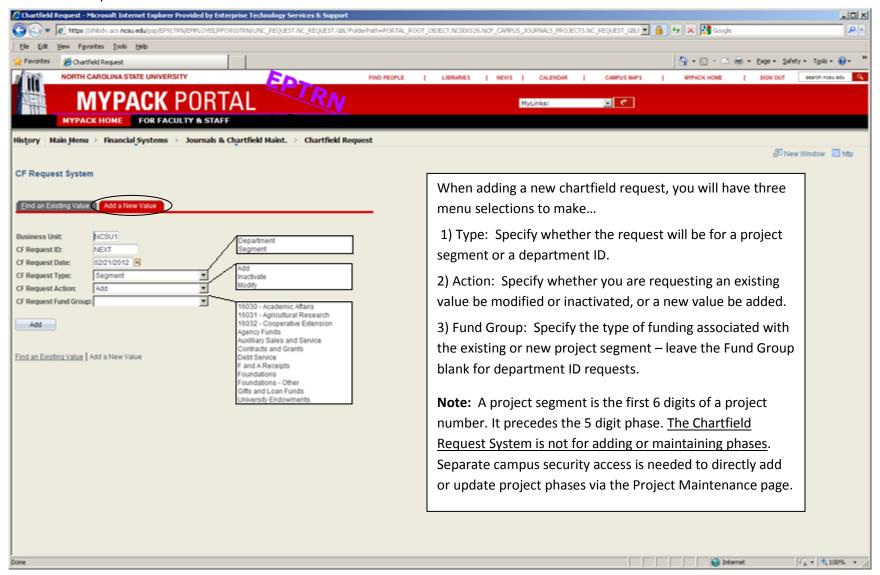
Chartfield Request System

The Chartfield Request System was created to make it easier for you to submit requests to create new chartfields and modify existing ones. Instead of having to remember which paper forms to mail to which central offices with which signatures, it will allow you to create and submit an electronic request from within the Financials system and have it route automatically for all the correct approvals and then to the correct central office for processing.

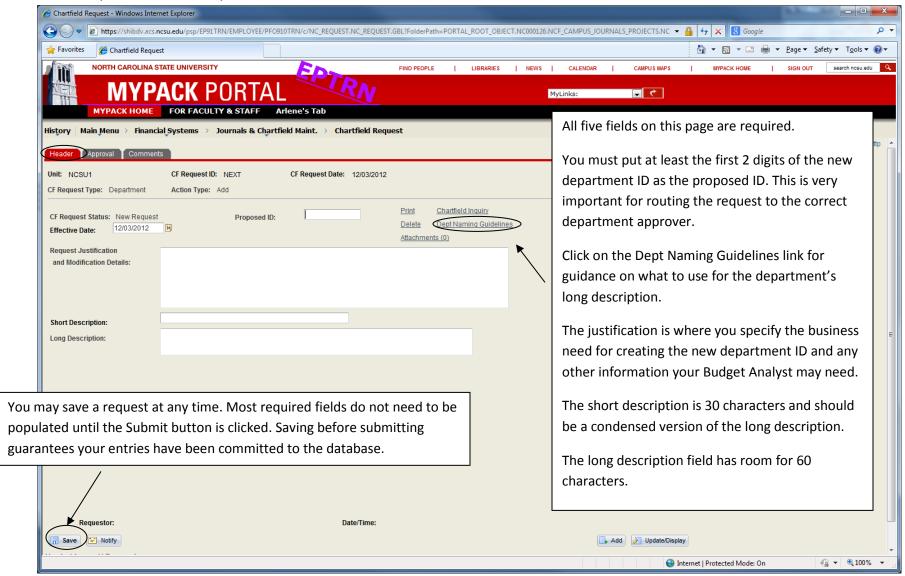
The Chartfield Request System will allow you to submit electronic requests for new Department IDs, modifications to existing Department IDs, and Department ID inactivations. You will be able to submit electronic requests for new Project Segments for any of the following fund sources: State Appropriated, F&A, Grants, Foundations, University Endowments, Auxiliary Sales & Service, Agency, Debt, and Gifts/Loans. You will also be able to submit requests to modify or inactivate existing Project Segments for those same fund sources.

Navigation: Main Menu > Financial Systems > Journals & Chartfield Maint. > Chartfield Request

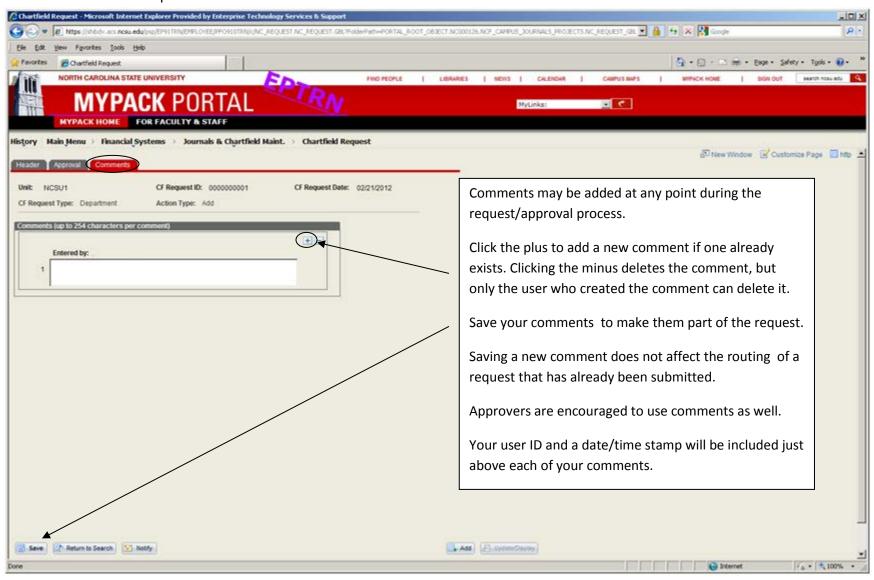
Add a New Request



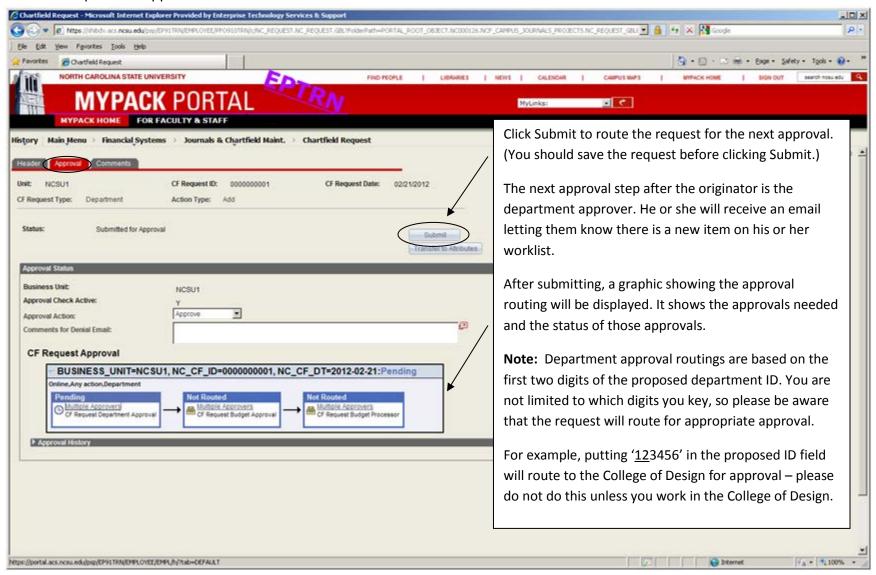
Add a Request for a New Department ID



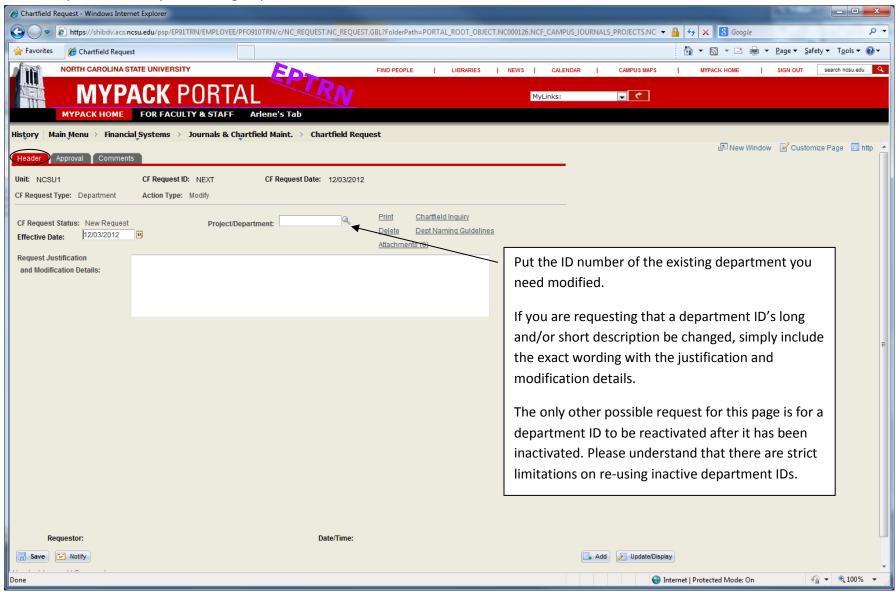
Add a Comment to a Request



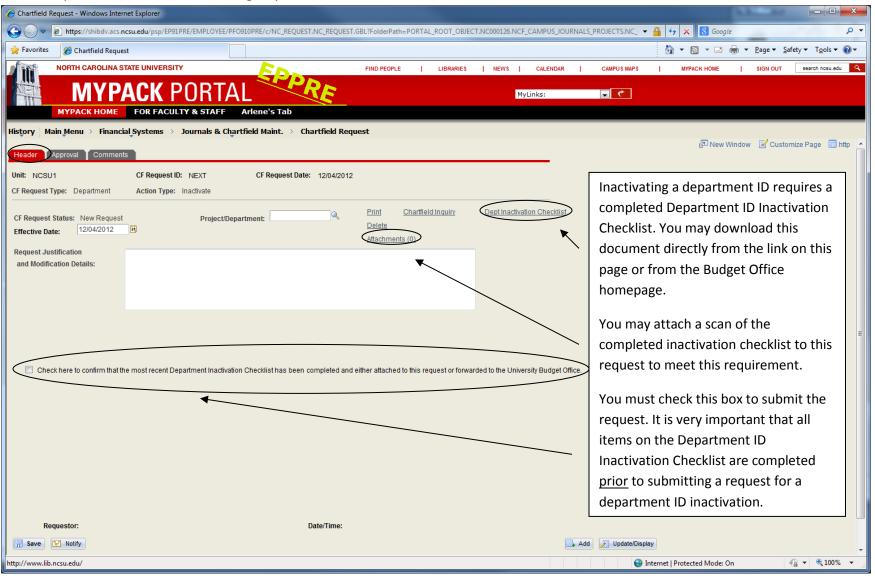
Submit a Request for Approval



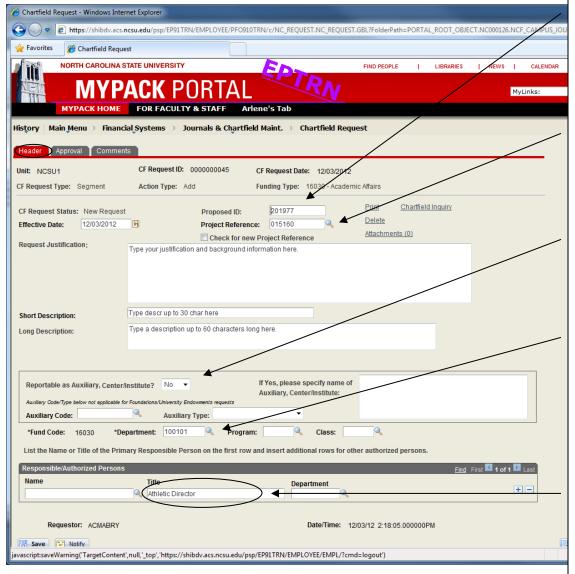
Add a Request to Modify an Existing Department ID



Add a Request to Inactivate an Existing Department ID



Add a Request for a New Project Segment



The proposed project segment ID is not required. You may provide an example of what you want it to be or even just a portion of it -201xxx.

Project Reference is one of the required fields on this page. For all 16030 requests it needs to be **015160**, and for all F&A requests it needs to be **015260**. (16031 and 16032 requests vary.) Note: There will never be a reason to check the new Project Reference box for State or F&A funds.

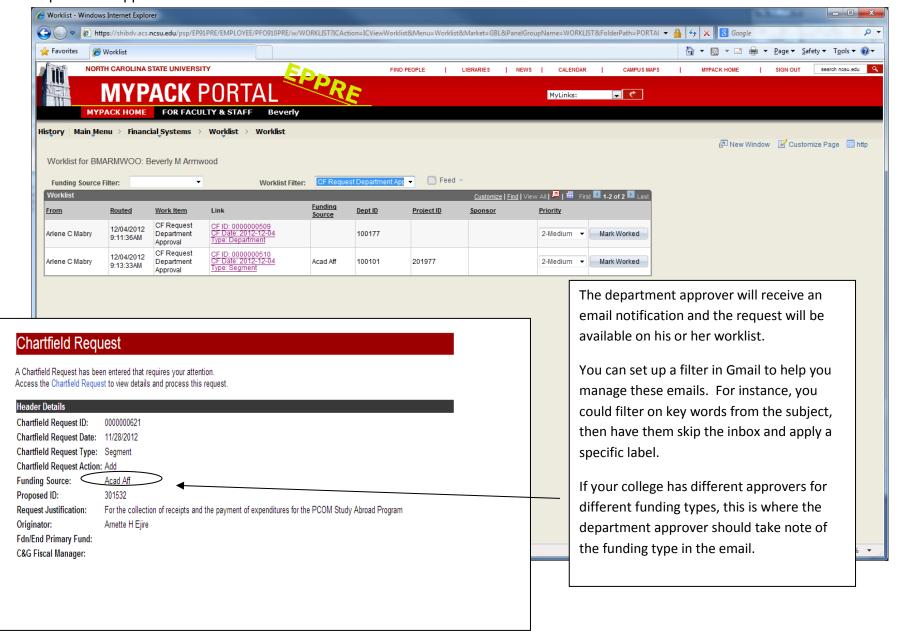
Please specify if you know that the new project segment will be used as part of a Budget Office reviewed auxiliary unit or a Center/Institute (as defined by the Office of Research & Innovation). It's not required, but you may include the Auxiliary Code if you know it.

Department selections are limited to only those you have security for. You are required to assign an existing six digit department ID to the new project segment.

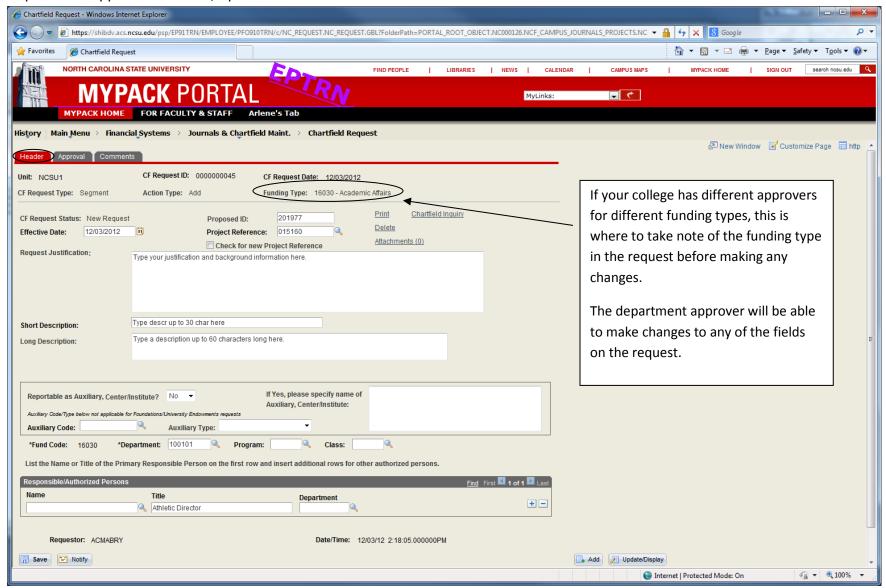
Program and Class are not required. (See the table on the Helpful Hints page for information on matching the proposed project segment with program and class in 16030 and F&A.)

For 16030, 16031, 16032, and F&A, please use <u>only</u> the Title field for the Responsible Person. This should not be a person's name. It should be a job title that does not need to be updated with employee turnover, such as, "Director" or "Dept Head".

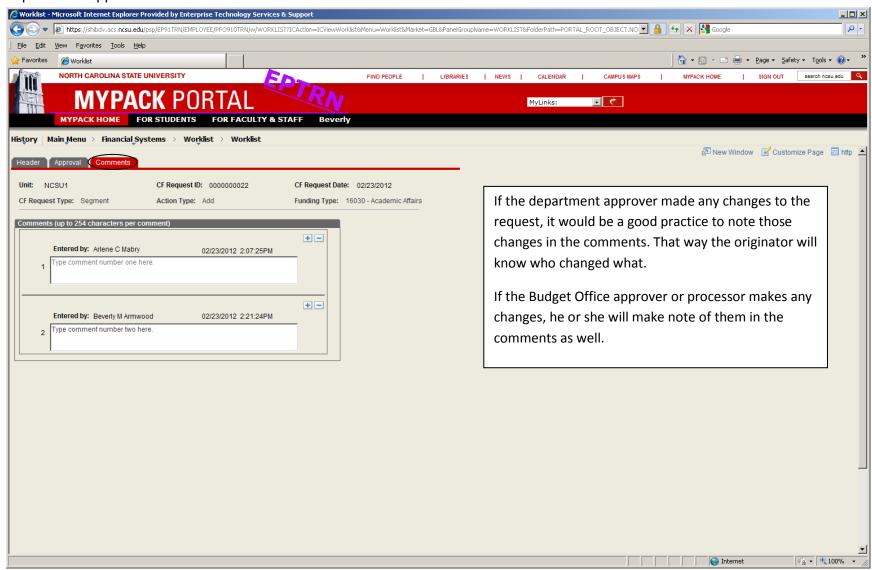
Department Approver's Work List



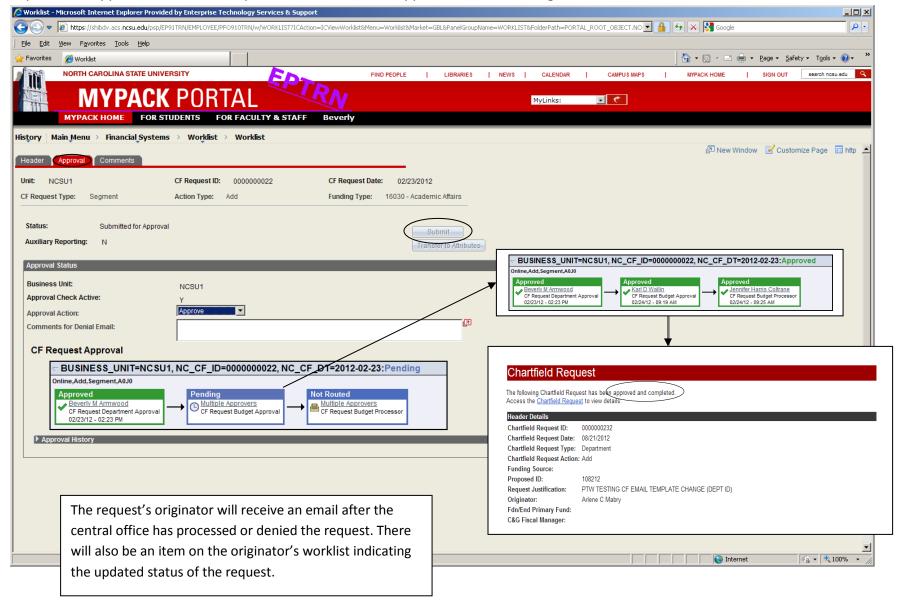
Department Approver's Review/Update



Department Approver's Comments



Department Approver Submits a Request for Central Office Approval and Processing



Helpful Hints:

- You may save a request at any time. Most required fields do not need to be populated until the Submit button is clicked. Saving before submitting guarantees your entries have been committed to the database.
- There is a clickable "Chartfield Inquiry" link on all header tabs in the Chartfield Request System. Use it to determine if your proposed project or department ID already exists and, if so, what attributes or projects are associated with it. Be sure to search for "All Projects". There are strict limitations on re-using inactive projects and inactive department IDs.
- There is no proxy approver functionality for chartfield requests like there is for other transactions. The first level of approval is based on the two digit department ID specified in each request. The central office level of approval is based on the fund group specified at the start of each request.

Table: Matching Project Segments with Program and Class in 16030 and F&A.

	Class:	212	39*	23376	23379	262
Program	Description of Funds	State	ETF	Approp	Prem	F&A
Code		Approp		Rcpt	Tuit	
101	Regular Term Instruction	201xxx	361xxx	301xxx	301xxx	251xxx
102	Summer Term Instruction	202xxx	-	302xxx	-	252xxx
103	Extension Instruction and Non-Credit Instruction	203xxx	-	303xxx	-	253xxx
106	Veterinary Medicine	204xxx	-	304xxx	304xxx	254xxx
110	Organized Research	207xxx	-	307xxx	-	257xxx
142	Community Services	211xxx	-	311xxx	=	261xxx
151	Libraries	214xxx	-	314xxx	-	264xxx
152	General Academic Support	215xxx	-	315xxx	-	265xxx
160	Student Services	218xxx	-	318xxx	-	268xxx
170	Institutional Support	221xxx	-	321xxx	-	271xxx
180	Physical Plant Operations	224xxx	-	324xxx	-	274xxx
230	Student Financial Aid	227xxx	-	=	327xxx	277xxx

Distance Education is the exception to the table above. All Distance Education projects begin with 205xxx and are in Class 215, regardless of Program Code.

^{*}Education and Technology Fee (ETF) projects now begin with 361xxx and are in class 39. As such, they are Trust funds administered by the Controller's Office. They are requested using Fund Group "Auxiliary Sales and Service".