

NEW CHARTFIELD REQUEST PROCEDURES

OVERVIEW: A New ChartField Request form must be completed by a fiscal officer when a new ChartField string is needed to track a new non-project accounting activity at the University.

NAVIGATION: In Microsoft Outlook, select: New Items (under the Home tab) > More Items > Choose Form > UM New Chartfield Request > click Open.

To	UMSL, NEW ACCT REQ
Cc	Sherry M. Hieken
Subject	New ChartField Request (default), add “Short Description” (see below)
Contact Person	Person making the request for a new ChartField
Address	Campus address of the Contact Person
Person(s) Responsible for Budget	Individual(s) responsible for creating and maintaining the budget for this ChartField
Division	DEPTNODE for Division
Department	DEPTNODE for Department
Sub Department (if applicable)	DEPTNODE for Sub Department. NOTE: Not all Departments have a Sub Department.
Source of Funds	The specific Fund Code that will be assigned to the new ChartField and the source of revenue that will be funding the activity. Examples: 0000-Operating Funds, 2000-Expendable Gifts. If you are unsure of the Fund Code, list the primary source of revenue.
Authorized Signers	Individual(s) who is authorized to make and/or approve expenses.
Authorized Signers for Travel	Individual(s) who is authorized to approve reimbursable expenses in T&E.
Short Description	Short Name of the activity (up to 30 characters), also include in the “Subject” field
Long Description	More descriptive name of the activity
Program Classification Structure (PCS)	Select the appropriate classification from the drop-down box. Base your selection on the category of the primary expenses that will be charged to this ChartField. This is used for financial reporting at the University of Missouri. Additional information about PCS definitions can be found at the following link: https://uminfopoint.umsystem.edu/media/fa/controller/apm/apm_3.45.15.pdf
Start Date	Date Activity will begin
End Date (if applicable)	If there is one, enter end date of activity. NOTE: No entries can be made after this date.
Will Payroll be charged to this Account?	Select Yes or No
If Hospital, will it be used for patient revenues?	N/A
Explanation of Chartfield(s) Needed	Provide a detailed explanation of the activity that will take place in the ChartField String. Typically, the activity must be ongoing and not temporary in duration. This information is needed to set up the ChartField correctly.
Proposed Budget	Provide budget if you want the Budget Office to enter the budget once the ChartField has been set up. The Budget Office cannot enter budget with transfer accounts unless both sides of the transfer are included.

Once the Form is completed, press the “**Send**” button.