

CHARTFIELD REQUEST FORM INSTRUCTIONS

Overview

In order to add, update or inactivate a chartfield, campus users must complete a Chartfield Request Form. The routing of the form through email will ensure that the Requestor, Chartfield Approver and FISCOA (fiscoa@csulb.edu) all have electronic copies of the Chartfield Request Form. This document further describes the process for accessing and completing the Chartfield Request Form.

Who approves the Chartfield Request Form?

The Requestor must route the form to their Chartfield Approver. The Chartfield Approver must be assigned a DOA Level higher than the Requestor. SpeedChart requestor and approver may be the same person provided that they are a Level 4 or higher.

Note: For the Research Foundation, LBFDN, the Senior Director of Sponsored Programs, has been authorized to be the Chartfield Approver for all Grant Funds.

After the approved Chartfield Request Form has been received, FISCOA will determine if General Accounting approval is necessary.

Can I add attachments to the Chartfield Request Form?

Yes, you can add attachments to the Chartfield Request Form.

What software is required to submit the form?

The workflow submission process on the Chartfield Request Form requires Adobe Acrobat Professional.

Do I need to complete a Delegation of Authority Form?

A Delegation of Authority is required when requesting a new fund or department. The Delegation of Authority Form can be found at, http://web.csulb.edu/divisions/af/cms/end_user/FIS/forms/DOA_Form.pdf

Where to send the Form?

Completed forms, or questions regarding form completion or submission, should be sent to fiscoa@csulb.edu.

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Completing & Submitting the Chartfield Request Form

Once the Chartfield Request Form has been accessed, the next step is to complete the Form.

Business Units

In this section, select the Business Unit in which the Chartfield should be set up in.

Business Units LBCMP LBFDN LB49R

Processing Step / Field Name	Screenshot / Description
LBCMP	CSU Long Beach
LBFDN	Research Foundation
LB49R	49er Foundation

Request Type

In this section, select the type of Chartfield Request.

Request Type Add Update Inactivate

Processing Step / Field Name	Screenshot / Description
Add	Select if requesting a new chartfield.
Update	Select this option to modify an existing Chartfield.
Inactivate	Select this option to inactivate a Chartfield.

Chartfield (CF)

In this section, select the type of Chartfield to add, update or inactivate.

Chartfield (CF) Fund Account Dept Project Program Class **SpeedChart** Yes No

Processing Step / Field Name	Screenshot / Description
Fund	Select to add, update, or inactivate a Fund.
Account	Select to add, update, or inactivate an Account.
Dept	Select to add, update, or inactivate a Department.
Project	Select to add, update, or inactivate a Project.
Program	Select to add, update, or inactivate a Program.
Class	Select to add, update, or inactivate a Class.
SpeedChart	Select Yes if SpeedChart is required.

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SpeedChart

In this section, provide the SpeedChart Chartfields.

SpeedChart Fund: Dept: Program: Class: Project:

Processing Step / Field Name	Screenshot / Description
Fund:	If SpeedChart = Yes, specify Fund. Required.
Dept:	If SpeedChart = Yes, specify Dept. Required.
Program:	If SpeedChart = Yes, specify Program. Optional.
Class:	If SpeedChart = Yes, specify Class. Optional.
Project:	If SpeedChart = Yes, specify Project. Optional.

In this section, provide the CF information relevant to your request.

CF Description: CF / SpeedChart Value:

Purpose:

Additional Information or Criteria:

Processing Step / Field Name	Screenshot / Description
CF Description:	Enter a title/description of proposed or existing Chartfield. Required when adding a CF. A CF description is not necessary for SpeedChart requests.
CF / SpeedChart Value:	Enter existing Chartfield Value. Required when updating or inactivating a CF.
Purpose:	Provide a specific reason for the new Chartfield or an update reason for an existing Chartfield. Required when adding a CF.
Additional Information or Criteria:	Provide any additional Chartfield information you feel is pertinent to your request. Optional.

Fund

This section will be enabled when Fund is selected in the Chartfield section.

Fund Reporting Dept: Fund Owner Name:

Revenue Source:

Type of Expenditures:

Disposition of Funds:

Type of Fund / Program: (LB49R USE ONLY)

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Processing Step / Field Name	Screenshot / Description
Reporting Department:	Select the Department ID the fund belongs to. Required when adding a fund.
Fund Owner:	Indicate the person who is the owner of the fund. Required when adding a fund.
Revenue Source:	Specify the revenue source(s) of this fund. Where the money is coming from and how often. If supporting documentation is available a copy should be attached to the request. Required when adding a fund.
Type of Expenditures:	Provide a detailed description of the type(s) of expenditures to be charged to the fund (e.g. equipment, supplies, payroll, travel etc.). Required when adding a fund.
Disposition of Funds:	If there are monies remaining in the fund at the time the fund is to be closed, indicate an existing fund/dept number the money should be transferred to. Required when adding a fund.
Type of Fund / Program:	Select the type of fund/program. Required when adding a LB49R fund. Endowment-Chair – Only used for officially approved faculty appointments. Funds may be used to supplement salary, pay for travel, supplies, equipment or other approved expenses of the chair-holder Endowment-Program – General type of fund used for supplies, travel, honorariums, etc. May not be used to provide payments to students, unless in the form of wages, or for approved programmatic reimbursements. Endowment-Scholarship – Any type of funding to a student NOT considered wages (must be processed through the Financial Aid Office). Endowment-Unrestricted. Requires Presidential Approval.

Department

This section will be enabled when Dept is chosen in the Chartfield section.

Department Payroll Costs: Yes No Subdivision/College Roll Up:

Processing Step / Field Name	Screenshot / Description
Payroll Costs:	Select from the options Yes or No to specify if payroll costs are applicable. Required when adding a department.
Subdivision/College Roll Up:	Indicate the main department number (Division, Subdivision or Sub-subdivision) the department reports to. Required when adding a department.

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Project

This section will be enabled when Project is chosen in the Chartfield section.

Project Start Date: End Date:

Sponsored Programs Only: FA - PI: FA - Dept: FA - College: FA - ORSP:

Processing Step / Field Name	Screenshot / Description
Start /date:	Enter project start date. Required when adding a project.
End Date:	Enter project end date. Required when adding a project.
FA-PI:	Only used for a Sponsored Programs Project. Enter project attribute, F&A PI.
FA-Dept:	Only used for a Sponsored Programs Project. Enter project attribute, F&A Dept.
FA-College:	Only used for a Sponsored Programs Project. Enter project attribute, F&A College.
FA-ORSP:	Only used for a Sponsored Programs Project. Enter project attribute, F&A ORSP.

Accounting Use Only

This section is for General Accounting use only, when applicable.

Accounting Use Only Capital: Yes No Budgeted: Yes No FNAT Key: % of Fees:

AAT Key: Rule 4 Program Code: Reporting Group: GAAP Override: Program Code:

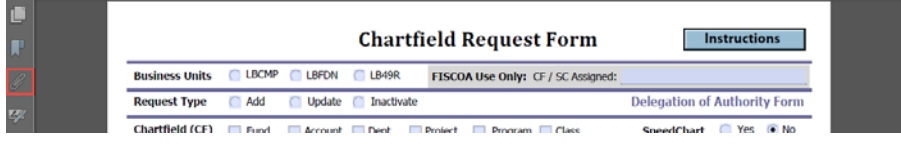
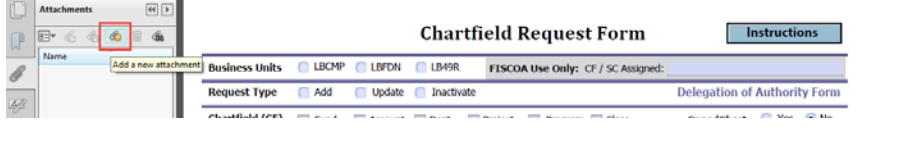
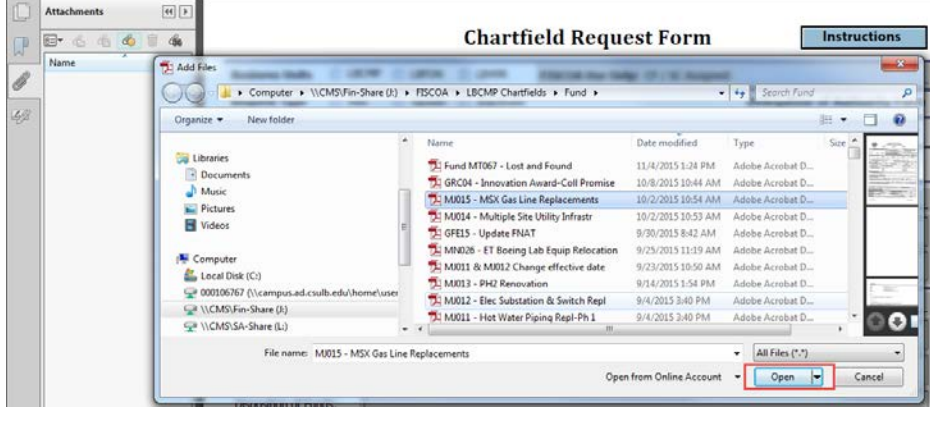
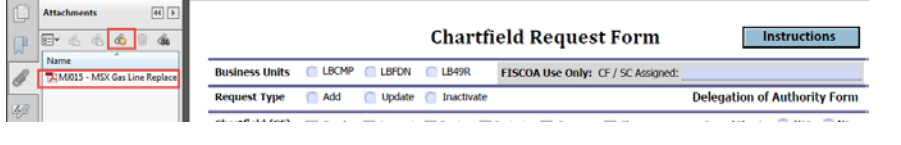
Additional Information:

Processing Step / Field Name	Screenshot / Description
Capital:	Project Request – Choose Yes, No to specify if project is capital.
Budgeted:	Fund Request - Select from the options Yes, No to specify if fund is budgeted.
FNAT Key:	Fund Request - Enter Fund Attribute Key, FNAT Key.
% of Fees:	Fund Request - Enter Fund % of Fees to be charged. If no fees are to be charged, enter 0.
AAT Key:	Account Request - Enter Account Attribute Key, AAT Key.
Rule 4 Program Code:	Dept Request - Enter Rule 4 Program Code.
Reporting Group:	Fund Request - Enter the Reporting Group this Fund belongs to.
GAAP Override:	Fund Request - Enter a GAAP Override code if applicable.
Program Code:	Fund Request - Enter Program Code if applicable.
Additional Information:	Include any additional information.

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Adding Attachments

Attachments may be added if applicable.

Processing Step / Field Name	Screenshot / Description
<p>Click the paper clip icon</p>	 <p>The screenshot shows the top portion of the Chartfield Request Form. The 'Attachments' section on the left contains a paper clip icon, which is highlighted with a red box. The main form area includes fields for Business Units (LBCMP, LBFDN, LB49R), Request Type (Add, Update, Inactivate), and other options like FISCOA Use Only and Delegation of Authority Form.</p>
<p>Click the new attachment icon</p>	 <p>The screenshot shows the Attachments section with a 'Name' field and an 'Add a new attachment' icon (a paper clip with a plus sign) highlighted with a red box. The rest of the form is visible in the background.</p>
<p>Select the file to attach</p>	 <p>The screenshot shows the Chartfield Request Form with a Windows File Explorer window open over it. The File Explorer is displaying a list of files in a folder named 'Fund'. The file 'M015 - MSX Gas Line Replacements' is selected. The 'Open' button at the bottom right of the File Explorer window is highlighted with a red box.</p>
<p>Attach additional files</p>	 <p>The screenshot shows the Attachments section of the Chartfield Request Form. The file 'M015 - MSX Gas Line Replacements' is now listed in the 'Name' field and is highlighted with a red box.</p>

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Requestor

This section must be completed by the Requestor for the Chartfield request process to function correctly.

Requestor
 Requestor: Date: Comments:
 Requestor Email:

Processing Step / Field Name	Screenshot / Description
Requestor:	The Requestor must include their First and Last Name.
Date:	The Requestor must include the date they certified their request.
Requestor Email:	The Requestor must include their email address. This is used so the Applicant can be notified during the routing and approval process for the form.
Comments:	Include any remarks or comments the Requestor has regarding the request.

Chartfield (CF) Approval

After the Requestor section has been completed, the Chartfield Approver must electronically review the form and indicate whether they approve the request or changes are required by completing this Chartfield (CF) Approval section. The Chartfield Approver must be assigned a DOA Level higher than the Requestor.

Note: For the Research Foundation, LBFDN, the Senior Director of Sponsored Programs, has been authorized to be the Chartfield Approver for all Grant Funds.

Chartfield (CF) Approval By checking this box, I have reviewed and approve this chartfield request.
 Chartfield Approver: Date: Comments:
 Chartfield Approver Email:

Processing Step / Field Name	Screenshot / Description
Chartfield (CF) Approval. By checking this box, I have reviewed and approve this chartfield request.	The Chartfield Approver must select the checkbox certifying that they have reviewed and approve the Chartfield request.
Chartfield Approver:	The Chartfield Approver must include their First and Last Name.
Date:	The Chartfield Approver must include the date they certified their request.
Chartfield Approver Email:	The Chartfield Approver must include their email address. This is used so the Chartfield Approver can be notified during the routing and approval process for the form.
Comments:	Include any remarks or comments the Chartfield Approver has regarding the request.

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General Accounting (GA) Approval

Once the requested access has been approved, General Accounting will review and approve the request, if applicable.

General Accounting (GA) Approval Not Applicable By checking this box, I have approved this chartfield request.

GA Approver: Date: Comments:
 GA Approver Email:

Processing Step / Field Name	Screenshot / Description
General Accounting (GA) Approval. By checking this box, I have approved this chartfield request.	If Applicable, the GA Approver must select the checkbox certifying that they approve the Chartfield request.
GA Approver:	The GA Approver must include their First and Last Name.
Date:	The GA Approver must include the date they certified their request.
GA Approver Email:	The GA Approver must include their email address. This is used so the GA Approver can be notified during the routing and approval process for the form.
Comments:	Include any remarks or comments the GA Approver has regarding the request.

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WORK FLOW SUBMITTAL

There are several points in the process where email notifications will need to be sent. The table below explains the various workflows.

Workflow Submittal - The chartfield request form attached to the requestor and approver's "csulb.edu" e-mail is an acceptable method of authentication, so signatures are not required as long as both e-mail receipts are sent to the FISCOA.

Requestor sends form to the chartfield approver and FISCOA is copied for authentication. Send

TIMESTAMPS Req: _____ CA: _____ GA: _____ FISCOA: _____ Version: 1.0

Processing Step / Field Name	Screenshot / Description
Requestor	<div style="border: 1px solid black; padding: 5px; margin-bottom: 10px;"> <p>Requestor sends form to the chartfield approver and FISCOA is copied for authentication. Send</p> </div> <p>After the form has been completed, certified, and dated by the Requestor, the Requestor will select "Requestor sends form to the chartfield approver and FISCOA is copied for authentication" from the pull-down menu (default option), and then click on the "Send" button. This will create an editable email with the Chartfield Request Form attached (pdf file format). The Requestor will add the campus email address of their Chartfield Approver in the "To" field. The Requestor and fiscoa@csulb.edu will be automatically included in the cc field.</p> <p>If prompted with the Send Email dialog box, select to use the "default mail application" and then select "Continue".</p> <div style="border: 1px solid gray; padding: 10px; margin-top: 10px;"> <p style="text-align: center; border-bottom: 1px solid gray;">Send Email ✕</p> <p>How would you like to send this email?</p> <p><input checked="" type="radio"/> Default email application (Microsoft Outlook)</p> <p><input type="radio"/> Use Webmail</p> <p style="text-align: center;">Select ▾</p> <p><input type="checkbox"/> Remember my choice</p> <p style="text-align: center;"> Continue Cancel </p> </div>

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Processing Step / Field Name	Screenshot / Description
	<p>A draft email will open in your mail application with text similar to the content below, only requiring the "To" recipient to be added to the email. FISCOA will already be added in the cc field.</p> <p>The attached Chart field Request Form has been completed by [Requestor] requesting to update the Chart field values in CFS PeopleSoft Finance and is ready for your review and approval. Detailed instructions on how to complete the process are available by clicking the 'Instructions' button at the top of the attached form page.</p> <p>If you approve the Chart field, then complete the following steps:</p> <ol style="list-style-type: none"> 1. Complete the Chart field Approval section at the bottom of the attached form. <ol style="list-style-type: none"> a. Select the approval checkbox. b. Add/Verify your name, date, and email. c. In the comments field, note any updates/changes made to the form for reference purposes. 2. Complete the Workflow Submittal section at the bottom of the attached form. <ol style="list-style-type: none"> a. Select Mail the form to FISCOA. b. Click the 'Send' button on the Chart field Request form. This will automatically attach the form to a new e-mail and create a standard message for FISCOA. c. Click the 'Send' button from your mail client to deliver the mail message to FISCOA. <p>I also copied FISCOA as a substitute for my signature on the form. This email will serve as an acceptable method of authentication for the request.</p> <p>Please let me know if you have any questions.</p> <p>Thank you, [Requestor]</p> <p>If the recipient of the email is not the Chartfield Approver but needs to authorize the request for internal departmental purposes, the email can be forwarded on to the appropriate level 4 administrator to complete the steps.</p>

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Processing Step / Field Name	Screenshot / Description
<p>Chartfield (CF) Approval</p>	<div style="border: 1px solid black; padding: 2px; margin-bottom: 10px;"> Chartfield Approver sends form to FISCOA to update the system. Send </div> <p>After the Chartfield Approver has completed, certified, and dated the form, then the Chartfield Approver will select "Chartfield Approver sends form to FISCOA to update the system." from the pull-down menu, and then click on the "Send" button. This will create an editable email with the form attached. It will be addressed to fiscoa@csulb.edu and copy the Requestor and Chartfield Approver.</p> <p>If prompted, select to use the default mail application and "Continue".</p> <p>A draft email will open in your mail application with text similar to the content below:</p> <p style="margin-left: 40px;">FISCOA,</p> <p style="margin-left: 40px;">The attached Chart field Request form has been completed by [Requestor]</p> <p style="margin-left: 40px;">and approved by [Chartfield Approver]. Please process this Chart field request and let us know when it has been completed. This email will serve as an acceptable method of authentication for the approval.</p> <p style="margin-left: 40px;">Please let us know if you have any questions.</p> <p style="margin-left: 40px;">Thank you,</p> <p style="margin-left: 40px;">[Chartfield Approver]</p>
<p>FISCOA</p>	<div style="border: 1px solid black; padding: 2px; margin-bottom: 10px;"> FISCOA sends final form to the requestor and chartfield approver. Send </div> <p>After the FISCOA administrator has processed the form, then the FISCOA administrator will select "FISCOA sends final form to the requestor and chartfield approver." from the pull-down menu, and then click on the "Send" button. This will create an editable email with the form attached. It will be addressed to the Requestor and Chartfield Approver and copy FISCOA.</p> <p>If prompted, select to use the default mail application and "Continue".</p> <p>A draft email will open in your mail application with text similar to the content below:</p> <p style="margin-left: 40px;">The attached Chart field form has been completed by FISCOA.</p> <p style="margin-left: 40px;">Let us know if you have any questions.</p> <p style="margin-left: 40px;">Thank you,</p> <p style="margin-left: 40px;">FISCOA</p>

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Processing Step / Field Name	Screenshot / Description
<p>Optional</p>	<div style="border: 1px solid black; padding: 5px; margin-bottom: 10px;"> Optional: Route form to co-workers for validation and questions. Send </div> <p>If a user has a question or would like to email the form to a co-worker, then select "Optional: Route form to co-workers for validation and questions." from the pull-down menu, and then click on the "Send" button.</p> <p>This will create an editable email with the form attached. The email will not be automatically addressed as in the other steps, allowing the user to select the appropriate recipients.</p> <p style="padding-left: 40px;">I am in the process of completing the attached form and have the following questions:</p> <p style="padding-left: 40px;"><i>Type custom text here</i></p> <p>Please respond to the sender of this message for additional comments and questions.</p> <p>Thank you</p>
<p>Reset Approvals</p>	<div style="border: 1px solid black; padding: 5px; margin-bottom: 10px;"> Reset workflow approvals Send </div> <p>If you experience an error message or problem in sending the form, the "Reset Workflow Approvals" will clear out the timestamps on the bottom of the form (not clear the entire form) and enable you to start the workflow from the beginning.</p> <p>If you select "Reset Workflow Approvals" you will be prompted to confirm your request with "Do you want to reset the workflow approvals?" Select "Yes" to confirm or "No" to return without changes.</p> <p><i>Note: "Reset Workflow Approvals" option will not be available until the applicant has selected "Send" to submit the form to their administrator for approval.</i></p>