PeopleSoft Chartfield Request Form: Instructions

Field Name	Definition/Instructions
ACTION	To create a new chartfield value, or reactivate a previously used chartfield value, choose **Activate**. To change an existing chartfield value, choose **Change**. To close a chartfield value, choose **Inactivate**.
EFFECTIVE DATE	Choose the first date for your change to take place.
CHARTFIELD TYPE	Select the appropriate type of chartfield from the drop-down list: Fund, Department, Account, Class, Program, Project.
CHARTFIELD VALUE	Enter the current chartfield value here for actions: **Inactivate** or **Change.** You may enter a suggested value if you are asking to **Activate.** Please note that your suggested value may not be selected as the chartfield value assigned. You will be notified when the request has been processed. Look in the **Chartfield Value Assigned** box at the bottom of the form to see the value that was selected.
BUSINESS UNIT	Choose the appropriate Business Unit(s) from the drop-down list. If you are unsure, leave this field blank.
PURPOSE	Please explain the purpose of your request here, including any details Business Services may need to complete your request.
LONG DESCR	Enter the long description (max 30 characters) that will appear in the Chart of Accounts.
SHORT DESCR	Enter the short description (max 10 characters) that will appear in PeopleSoft.
PAYROLL	Check **Yes** if the chartfield will be used for payroll. Otherwise, check **No.**
FUND REQUESTS	When making a Fund request, if you know the FNAT Key and/or Receiving Fund for an Interest Allocation, enter them here. Otherwise, leave these fields blank.
DEPT REQUESTS	When making a Dept request, if you know the NACUBO Program Code for FIRMS, and/or the location of the department on the MBU tree, please enter them here. Otherwise, please leave these fields blank.
ACCOUNT REQUESTS	When requesting a new Account, if you know the FIRMS Object Code and/or Account Tree and location, please enter them here. Otherwise, leave these fields blank.

PROJECT REQUESTS These fields must be completed for all new Project requests. The Start and End dates of the Project, the funding source of the project entered as a chartfield string, the total $ amount of the Project budget, and the name of the Project Manager.

SIGNATURES The following areas must approve all chartfield requests: University Budget Office, Accounting, and the AVP of Business Services. A requestor may print and mail the form to the Budget Office, or email an electronic copy of the form to budget@humboldt.edu. Always include the requestor's name, date and phone number.

FOR BUSINESS SERVICES USE ONLY – The requester should leave the rest of the form blank!

If you have any questions that have not been answered in these instructions,

please contact the University Budget Office at 826-3316.

Thank you!