ChartField: _ _ _ - _ _ _ _ - _ _ _ _ - _ _ _ _ _ _

University of Rhode Island – New ChartField Request Form Instructions
for New Departments and Programs
(For new grants contact Grant & Contract Accounting. For new funds contact the Budget Office)

The University of Rhode Island
Chartfield Create Form
Instructions

In order to request a new chartfield (a chartfield is a combination of fund, department, program and project if applicable) in the Peoplesoft system, a chartfield create form must be completed and forwarded to the Budget Office after the form is signed by the appropriate individuals. One form must be processed for each underline unique chartfield string to be created.

This form is a PDF file and requires the Adobe Acrobat Reader in order to view. If you do not have Adobe Acrobat please contact the URI OIS Helpdesk for help in installing the software.

Fill in all applicable fields on the form. Only select one item from the "Source of Funding Request" section. A determination will to determine if your source of funding request is correct. Changes may be made to this section.

Note: the chartfield create form must be accompanied by a signature authorization form, a line item budget by Peoplesoft Account and a memo of justification.

Once the chartfield has been created, the responsible person will be notified of the new chartfield string.

Please see the attached example form for additional details and help filling it out.

If you have any questions regarding this form, please contact the Budget Office at x42509.

Adobe Acrobat reader can be downloaded through the e-campus home page under e-Campus Help => How do I? And clicking on "Download Acrobat Reader Now"

- or –

Go to http://www.uri.edu/ecampus/help_how.html and click "Download Acrobat Reader Now"

FOR BUDGET OFFICE USE ONLY

Name of the Department requesting the new Chartfield

University of Rhode Island – New ChartField Request Form
for New Departments and Programs
(Note - one form for each unique ChartField combination)
(For new grants contact Grant and Contract Accounting, all others the Budget Office)

Contact Telephone Number

When should the Chartfield be active

If for a limited time, please enter an end date

Requesting Department: _____Tel: _____

New ChartField Name: _____

Title of the new Chartfield being created

Request for new: Department ☐   Program ☐   Project ☐ (For Bond Funds and Capital Projects only)

Start Date: _____   End Date (if applicable): _____

(please attach memo justifying need for a new for the new chartfield string and any other pertinent backup information)

Description/Purpose of Chart Field: _____

Short description for the use/reason of the Chartfield

Who will be responsible for the new area/unit

Responsible Person's title

Peoplesoft 4 digit department number

Responsible Person*: _____ Title: _____ Dept:_____

*(Must match responsible person on signature authorization form)

This form must be accompanied by a Signature Authorization Form and a Budget by Account

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Source of Funding Request (Check one box within this area):
☐   Unrestricted (100)   ☐   Ledger 3 (non Dean's Overhead) (101)
☐   Dean's Overhead (110)   ☐   Foundation
☐   Auxiliary/Enterprise Fund   (name of aux/enterprise): _____fund #:_____
☐   Private Gift
☐   Other (If externally restricted, please indicate name of funding source): _____
If restricted please indicate: ☐ Yes   ☐ No

Annual Revenue Projection $ _____   Annual Expenditure Projection $ _____
Type of Expenditures: Personnel ☐   Operating ☐   Capital ☐   Scholarships ☐

Annual Expenditures (must match revenue if applicable)

Enter Annual Revenue projection here (if applicable)

Signatures:
(1) Responsible Person's Signature: _____Date: _____

(2) Vice President/Dean or Director's Signature: _____Date: _____

(3) Provost/Vice President's Signature (if an academic program): _____ Date: _____

(4) Budget Office Signature: _____Date: _____

NOTE: A deficit in the self supporting ChartField/Program will be charged to the College Dean's overhead account if an alternate source(s) of funding is not available.

Please see instructions for further information on how to fill out this