FIN-FRM-002

ChartField Request

Clear Form

Queen's UNIVERSITY

Form Instructions

☐ Print instructions

This form can be filled out online or by hand. Please note that if this form is filled out online, the content may change depending on the selected options. The form may also print differently than it appears on screen.
Please ensure that all fields are complete before submission. If requesting the creation of a new ChartField, the ChartField value will be determined by the Financial Services office.
This form must be approved by the Department Head, Dean, VP or Designate. Designates should indicate their position. New Department requests must also be approved the the Faculty/Unit Business Officer.
If requesting a new Endowment Fund or Trust Fund, an approved Terms of Reference, developed with assistance from the Office of Advancement must be attached. If requesting a new Trust Fund with grant revenue, a contract/agreement must be submitted with the ChartField request. Submit completed forms to financial.reporting@queensu.ca or deliver through internal mail to Financial Services, 355 King St. W. 3rd Floor. For more information, please visit the Managing Funds page on the Financial Services website.

ChartField Information

Action *(check ONE only)*: ☐ Create ☐ Modify ☐ Deactivate

ChartField Type *(check ONE only)*: ☐ Program ☐ Department ☐ Class ☐ Fund ☐ Account ☐ Capital Project

Effective Date __________

Chartfield Value __________ *(if Modifying / Deactivating)*

Description of New ChartField *(max 30 characters)* [ ]

☐ Terms of Reference *if required*

Requestor Information

Requestor (must be person responsible if requesting Department or Fund, as indicated above)

Full Name __________ Email __________

Position __________ Phone __________

Department ChartField *(if applicable for above noted changes)* [ ] Faculty/Department/Administrative Unit __________

Reason for ChartField Request

Note: The field below will automatically expand when filled.

[ ]

Approval

Approved by

Full Name __________ *(please print)* Position __________

Signature __________ Date __________ YYYY/MM/DD

Business Officer Approval - Required for New Departments

Full Name __________ *(please print)* Date __________ YYYY/MM/DD

Signature __________

Submit Form

Finance Office Use Only - Trees/ERS/Combo Rules/Notifications

DEPARTMENT

- ☐ Business Officer Approval s
- ☐ Coordinate w/ Procurement
- ☐ ALLDEPTS
- ☐ ALLDEPTS-BUDGETS
- ☐ ALLDEPTCFWD
- ☐ CLOSALLDEPTS
- ☐ CLOSANCILLDEPTS
- ☐ COFO_DEPTS
- ☐ CMBO_DEPT_FUND
- ☐ CMBO_DEPT_PROG
- ☐ CONCUR Combos
- ☐ Create Combo Rule
- ☐ iTrack Security Rule
- ☐ Notify HR
- ☐ Notify Requestor
- ☐ Notify Res Acct/SPS
- ☐ CMBO_DEPT_PROJ (Res Acct)

FUND

- ☐ Signed TOR
- ☐ ALLFUNDS
- ☐ RPT_ALLFUNDS
- ☐ CMBO_DEPT_FUND
- ☐ CONCUR Combos
- ☐ Notify Requestor
- ☐ Notify Advancement

PROGRAM

- ☐ ALLPROGRAMS
- ☐ CMBO_DEPT_PROG
- ☐ Notify ERS Team
- ☐ Notify Requestor

CLASS

- ☐ Notify ERS Team
- ☐ Notify Requestor

ACCOUNT

- ☐ ACCT_SEC
- ☐ ALLACCOUNTS
- ☐ ALLACCOUNTS_COFO
- ☐ ALLOC_ACCOUNTS
- ☐ CC_ACCTROLLUP_SPR
- ☐ FAST_ACCOUNTS
- ☐ FSACCOUNTS
- ☐ RPT_ALLACCOUNTS
- ☐ Notify Requestor
- ☐ Notify Res Acct (IS Accts) re:
- ☐ CMBO_TRI_AGENCY_ACCT
- ☐ ALLACCOUNTS_F300

Finance Office Use Only

☐ Approved

Entered by ______________________________ Date ______________ YYYY/MM/DD

Description ______________________________

	Fund	Department	Account	Program	Class	Project
ChartField Value						

☐ Denied:
- ☐ Does not meet criteria for the value requested
- ☐ Already exists as ______________
- ☐ Other ______________________________

Notice of Collection

When complete, this form will contain Personal & Confidential information. This information is being collected under the authority of the Queen's Royal Charter of 1841, as amended. This information will be used to manage Queen's chartfields within the PeopleSoft Finance system.