Purpose of this Form:

To indicate what particular ChartFields combinations must be added to the Combination Edit table to ensure only applicable transactions are posted to the new ChartField being added.

The ChartField below ( □ Org  □ Program  □ Project  □ Sub-Class  ) which is being requested should be:

- edited with the following chartfield combinations
- activated

<table>
<thead>
<tr>
<th>Fund</th>
<th>Org</th>
<th>Program</th>
<th>Project</th>
<th>Sub-Class*</th>
<th>Description</th>
<th>Expenditure Control Rule (ECR)</th>
<th>Available Resource Basis (ARB)</th>
<th>Cash Roll Up***</th>
<th>PIE Speedtype</th>
<th>Bond Fund</th>
<th>Restricted/Unrestricted Value</th>
<th>Unrestricted Net Asset Designation</th>
<th>Speed Type**</th>
</tr>
</thead>
<tbody>
<tr>
<td>72</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

* Note: Sub-class is required if you are requesting a Speed Type that will be used in an interface such as:
HR: UCB Bookstore; UCB Mailing Services.

** Note: Speed Type is necessary for sub-system (interface) feeds. Assigned by the Controller's Office.

*** Note: Required field for chartfield combinations for Funds 10, 11.

Other Notes and Information:

__________________________

**SpeedType Fiscal Staff** (optional field only if you want to enter a staff person for contact; up to 5 can be designated):

<table>
<thead>
<tr>
<th>Staff #1 Name:</th>
<th>Position #:</th>
<th>Expense System Attribute:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Staff #2 Name:</td>
<td>Position #:</td>
<td>Expense System Attribute:</td>
</tr>
<tr>
<td>Staff #3 Name:</td>
<td>Position #:</td>
<td>Expense System Attribute:</td>
</tr>
<tr>
<td>Staff #4 Name:</td>
<td>Position #:</td>
<td>Expense System Attribute:</td>
</tr>
<tr>
<td>Staff #5 Name:</td>
<td>Position #:</td>
<td>Expense System Attribute:</td>
</tr>
</tbody>
</table>
The purpose of this Workbook is to request additions or changes to Account, Org, Program, SubClass, Project/Grant, Tree structure and to request new SpeedTypes and Statistic Codes.

COMPLETE THIS COVER PAGE in addition to the specific ChartField request form.

To learn more about the ChartField structure, refer to the University Controller’s website:

http://www.cusys.edu/controller/

Please type in the following Information for your department:

Department: ______________________________

Contact Name: ____________________________

Telephone No. ____________________________

E-mail address: ____________________________

Date: ____________________________

Route this cover sheet and the applicable ChartField Change Forms via email to your Campus Controller/Finance Office.
Delete any worksheets that are not applicable.

Form Approval:

Campus Controller's Office:

Signed Printed Name Title Date

Office of University Controller:

Signed Printed Name Title Date
New Request

or

Change to Program #

Purpose of this Form: To add an additional Program ChartField value or modify an existing Program ChartField value.

Effective Date (mm/dd/yyyy):

(Date the Org should be added or modified)

Status:

☐ Active  ☐ Inactive

(Active indicates the Chartfield is valid for use; Inactive indicates the ChartField should no longer be used.)

System Program:

☐ (Limited to System use. Campuses do not use.)

*Program Name:

(Up to 30 Characters)

Program Source of Funding:

*Report Distrib

Box #:

Fiscal Principal* Name:

Position #:

Box #:

Fiscal Manager** Name:

Position #:

Box #:

Expenditure Control Rule (ECR):

Available Resource Basis (ARB):

Controller's Office Use Only

Program CU Attributes

*Expense Purpose Code: (choose one)

☐ 1100 - Instruction

☐ 1200 - Research

☐ 1300 - Public Service

☐ 1400 - Academic Support

☐ 1500 - Student Services

☐ 1600 - Institutional Support

☐ 1700 - Operation of Plant

☐ 1800 - Scholarships and Fellowships

☐ 1900 - Hospitals and Clinics

☐ 2000 - Auxiliary Enterprises

☐ 2100 - Internal Service Units

☐ 2200 - Other

Cost Center: (choose one)

☐ Departmental Administration

☐ Fitzsimons

☐ General Administration

☐ Instruction

☐ Lab for Atmos/Space Physics

☐ Library

☐ Other Institutional Activities

☐ Plant and Property

☐ Research Administration

☐ Research

☐ Student Administration

☐ Exclude

Controller's Office Use Only

Assigned new Program Value:

Other: *Student Fee (check One)

☐ Yes  ☐ No

Auxiliary Type: (choose one)

☐ PAA - Exempt Aux Inter Athl

☐ PAB - Exempt Aux Bookstores

☐ PAD - Exempt Aux Rec Cntr

☐ PAH - Exempt Aux Housing

☐ PAM - Exempt Aux Stu Health

☐ PAP - Exempt Aux Parking

☐ PAR - Exempt Aux Real Estate

☐ PAS - Exempt Aux Stu Govt Op

☐ PAU - Exempt Aux Stu Union

Bond Fund: (choose one)

☐ Auxiliary Facilities

☐ Non-bond Fund

☐ Recreation Building

☐ Research Building

*Enterprise Bond Fund: (choose one)

☐ E PAV - Hlth Serv 94, 95, 96 only

☐ E PAV - Hlth Serv 94 only

☐ E PAV - Hlth Serv

☐ Housing Operations

☐ Intercol Athletics

☐ Other Services - 94 only

☐ Other Services

☐ Parking Operations

☐ Student Facilities

Unrelated Business Income Tax: (choose one)

☐ Non-UBIT

☐ UBIT

Program Tree Information:

Placement of new Program value on Tree:

Level:

Node:

Other Notes and Information:

* Fiscal Principal Position - a University employee identified as programmatically responsible and accountable for the activities within a University Operational Unit.

Illustrative examples of Fund /Unit Managers and their Operational Units include: a Principal Investigator on a sponsored project, a Chair of an academic department,
a Dean of a College or School, and a Director of a department, center, laboratory, or institute. *(Admin. Policy Statement - Fiscal Management Roles and Responsibilities)*

**Fiscal Manager Position** - the University employee designated by the Fiscal Principal Position to accomplish the day-to-day financial transactions of an Operational Unit. *(Administrative Policy Statement - Fiscal Management Roles and Responsibilities)*