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
- inactivated

<table>
<thead>
<tr>
<th>Fund</th>
<th>Org</th>
<th>Program</th>
<th>Project</th>
<th>Sub-Class*</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<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></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):

- Staff #1 Name: Position #: Expense System Attribute:
- Staff #2 Name: Position #: Expense System Attribute:
- Staff #3 Name: Position #: Expense System Attribute:
- Staff #4 Name: Position #: Expense System Attribute:
- Staff #5 Name: Position #: Expense System Attribute:
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:

<table>
<thead>
<tr>
<th>Signed</th>
<th>Printed Name</th>
<th>Title</th>
<th>Date</th>
</tr>
</thead>
</table>

Office of University Controller:

<table>
<thead>
<tr>
<th>Signed</th>
<th>Printed Name</th>
<th>Title</th>
<th>Date</th>
</tr>
</thead>
</table>
**Purpose of this Form:**
To add an additional Org ChartField value or modify an existing Org ChartField value.

**Additional Form Required:**
The worksheet "Speed Type Request" in this workbook must be completed.

<table>
<thead>
<tr>
<th>Controller's Office Use Only</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assigned new Org value:</td>
</tr>
</tbody>
</table>

**Effective Date (mm/dd/yyyy):**
(Date the Org should be added or modified)

**Status (In FIN):**
(Required)
- [ ] Active
- [ ] Inactive

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

**Org Description:**
(Up to 30 Characters)

**Org Short Description:**
(up to 10 Characters)

**Fiscal Principal Position #:**

**Fiscal Principal Name:**

**Fiscal Principal Box #:**

**Fiscal Principal Name:**

**Fiscal Principal Box #:**

**Fiscal Principal Name:**

**Fiscal Principal Box #:**

**Officer Position #:**

**Officer Name:**

**Officer Box #:**

**Fiscal Manager Position #:**

**Fiscal Manager Name:**

**Fiscal Manager Box #:**

**International Travel Approver Position #:**

**International Travel Approver Name:**

**International Travel Approver Box #:**

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**Controller/Finance/Budget Office Use Only**

**Org Tree Information:**
Placement of new Org value on Tree: 
- Level: 
- Node: 

*Any change to move, inactivate or add an org must be sent to the PBS System Administrator, currently at: jennifer.bosma@cusys.edu*

**Will personnel use this org as a home department?**
- [ ] Yes
- [ ] No

If yes, complete the HRMS Tree Change Form at:
[https://www.cu.edu/ums/security/CUonly/AMPS/Forms/hrms-tree-change.pdf](https://www.cu.edu/ums/security/CUonly/AMPS/Forms/hrms-tree-change.pdf)

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**SEND COMPLETED FORM TO THE CAMPUS CONTROLLER’S OFFICE.**

**Fiscal Principal** - a University employee who has administrative and fiscal oversight for Fund/Unit Managers and their assigned Operational Units. The Fiscal Principal is typically the individual to whom the Fund/Unit Manager is held accountable for the programmatic and fiscal operations of Operational Units (reports administratively). Illustrative examples of Fiscal Principals include: a Chair of a department that conducts sponsored projects, a Dean of a College or School, a Vice Chancellor of campus functions, and a Chancellor of a campus. *(Administrative Policy Statement - Fiscal Management Roles and Responsibilities)*

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

Additional Form Required: The worksheet "Speed Type Request" in this workbook must be completed.

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: ___________________________  Program Source of Funding: ___________________________
(Up to 30 Characters)

*Provide a brief Purpose of the Program

Fiscal Principal* Name: ____________ Position #: ________  Box #: ________
Fiscal Manager** Name: ____________ Position #: ________  Box #: ________

Expenditure Control Rule (ECR):  

Controller’s Office Use Only
Program CU Attributes

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

Bond Fund: (choose one)  
Auxiliary Facilities  
Non-bond Fund  
Research Building

*Enterprise Bond Fund: (choose one)  
E PAV - Hlth Srv 94, 95, 96 only  
E PAV - Hlth Srv 94 only  
E PAV - Hlth Srv  
Housing Operations  
Intercol Athletics  
Non-bond Fund  
Other Services - 94 only  
Other Services  
Parking Operations  
Student Facilities

Unrelated Business Income Tax: (choose one)  
Non-UBIT  
UBIT

Controller’s Office Use Only
Assigned new Program Value:

*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

New Request
or
Change to Program #

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)