

Form Entry - Chartfield Request: SpeedType, Program, Subclass

ChartField Request Information

This form is accessible through a link on the OUC <u>Forms website</u>. Follow the directions below to complete and submit the form. *In some situations, pressing the Enter key will automatically Save the form. In this case, you will receive an email with a link to reopen the form and continue work.*

Click on the **Open: ChartField Request** link and the form opens.

• Any field with an asterisk (*) is a required field.

University of Colorado Boulder Colorado Springs Denver Anschutz Medical Campus	ChartField Request: New SpeedType, Program, Subclass
Office of University Controller	Chartfield Form ID 26
Purpose	
Used to request new SpeedTypes not using Fund 34. This includes additions or changes to Programs and/or Subclasses.	
For any other forms, please refer to the form directory.	
ChartField Request Information Attachments	

The **Requestor Information** section defaults with the current user's information. The Employee ID in this section controls campus routing.

• If you are entering the form on behalf of another user, you can update the Employee ID field.

Requestor Information	
Employee ID* First Name Last Name	
Email Address	
Org Unit Number Organizational Unit Description Campus	



Complete the Request Details section.

- The Effective Date can be back-dated or future-dated.
- In the **Program Funding Source**, identify where the money/budget is coming from. If this is a gift, do not continue with this ChartField Request form; instead, refer to the Gift Fund webpage/form on the <u>OUC Forms page</u>.
- Choose any appliable Additional Options.

Complete the ChartField Request List section.

- Enter a **SpeedType Description** (limited to 30 characters, including spaces).
- Choose a **Fund Code** from the drop-down. Contextual messages will appear based on the choice of Fund, indicating which Fund combinations are allowed.
- Enter an **Org** number and click the Tab key. The **Organizational Description** will autofill. If no description is found, the field will turn red. If the field turns red for any reason, click the **Clear** button to clear the field and try again.
- Click the Add button at the top of the section to create additional rows.

ChartField Request List		Add
Speedtype Description* Fund Code*	Org* Organizational Description	Remove
-		



Complete the **Staff look Up** section.

• This section is used to look up and enter information about the **Program Fiscal Principal**, **Program Fiscal Manager**, and **SpeedType Fiscal Staff**.

Staff Look Up		
nter position # and hit the tab key. If you do not have the position #, enter name, employee ID, or email address and click the Look Up button.		
Position #		
Name (Last, First) Emplid Email Address Org ID		
LOOK UP by Name, Emplid, or Email		
Use as Program Principal Use as Program Manager Add as Speedtype Fiscal Staff		

- To look up a person, enter the **Position #** and click the Tab key. The **Name, Emplid, Email** Address, and **Org ID** fields will autofill. If you do not have the position number, enter information **Name** (using upper/lower case and the format Lastname, Firstname) OR **Emplid** OR **Email Address** and click the **LOOK UP by Name, Emplid, or Email** button.
- If there are multiple position numbers, a popup menu will appear, and you can choose which position number you want to use.
- Once all Staff information has been provided, you can use the three buttons to assign this information to different sections of the form.
 - Click the Use as Program Principal button to copy the position number and name to the Program Fiscal Principal section. Click the Clear button in this section if you want to change your selection.
 - Click the Use as Program Manager button to copy the position number and name to the Program Fiscal Manager section. Click the Clear button in this section if you want to change your selection.
 - Click the Add as Speedtype Fiscal Staff button to add a new row to the SpeedType Fiscal Staff section. You will still need to enter an attribute for each row and choose one primary.

You can check the **Copy Fiscal Staff from Existing Speedtype** checkbox to bypass the **SpeedType Fiscal Staff** section. This will require you to enter a value in the **Speedtype for FS** text box.



Attachments

Attachments to the ChartField Request form are added by accessing the second tab at the top of the form, labeled **Attachments**.

University of Colorado Boulder Colorado Springs Denver Anschutz Medical Campus	ChartField Request: Ne Subclass
Office of University Controller	Chartfield Form ID 488
Purpose	
Used to request new SpeedTypes not using Funds 34. This includes additions or changes	to Programs and/or Subclasses .
For any other forms, please refer to the form directory.	
ChartField Request Information Attachments	
Required Attachments	
UBIT Questionaire* (0)	Attachment Description
UBIT Questionnaire * Browse	
Checklist* (0)	Attachment Description*
Checklist* Browse	
Optional Attachments	
Attach Approval Email	
Attach Contract	
Attach Supporting Document (other)	

Complete the sections under the **Required Attachments** heading.

- If there are any required attachments based on your form selections, a corresponding section will appear on the form.
- Click the **Browse** button to select your document.
- Click Open.
- Fill out the required Attachment Description section.



Complete the sections under the **Optional Attachments** heading, if needed.

• Check the box next to the type of optional attachment you wish to attach.

Optional Attachments
Attach Approval Email
Attach Contract
Attach Supporting Document (other)

Attach Supporting Document (other)		
Supporting Documents (other)		
Additional Supporting Documentation (0) Additional Supporting Document Browse	Description*	Add another supporting document

A section will appear for each type of optional attachment you select.

- Click the **Browse** button to select your document.
- Click Open.
- Fill out the required Attachment Description section.



Submitting and/or Saving

Once you have entered all the information that you have available, you can either save the form and return later or submit the form for approval.

- 1. To save your form...
 - a. Check the box next to I would like to Save my form.
 - b. Click the **Save** button at the bottom of the first tab of the form.

I would like to Save my form.

Save

(After clicking save you will receive an email where you can access your saved request)

- c. Once you have clicked **Save**, a pop-up will appear asking if you want to save the form. Click **No** if you do not want to enter further forms.
 - *i.* Once the form has been saved, an email will be sent to the email address associated with the employee id at the top of the form. This email will include a link to access the form for later completion.
- 2. To submit your form...
 - a. Once your form is complete, check the box next to the message that reads, 'I am ready for my form to be submitted'
 - *i.* If there are still additional fields required on your form, those fields will be indicated with messages at the top of the window.
 - *ii.* All messages must be resolved before the form can be submitted.

	 <u>Program Fiscal Principal Position #*</u>:Program Fiscal Principal Position # is required. <u>Program Funding Source*</u>:Program Funding Source is required. <u>Purpose of SpeedType</u>, <u>Program or Subclass*</u>:Purpose of SpeedType, Program or Subclass is required. <u>Program Fiscal Manager Position #*</u>:Program Fiscal Manager Position # is required.
	 New Subclass SpeedType (new or existing Subclass) New SpeedTypes(s) using an existing Program
l	ChartField Request List
	Speedtype Description** Fund Code**

b. Click the **Submit** button to submit the form for approval.