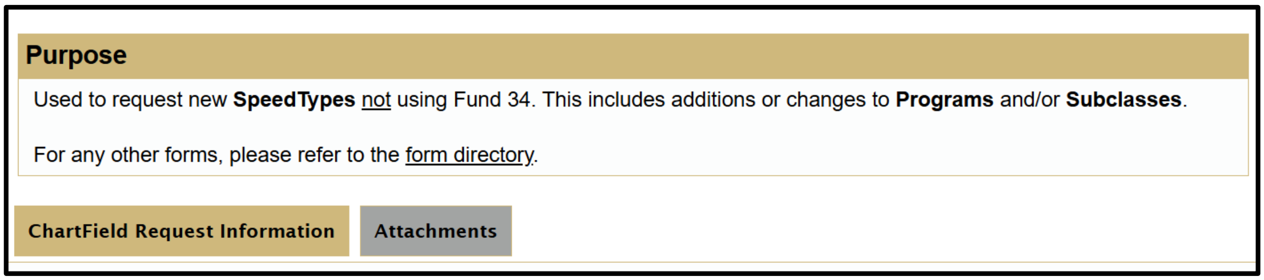
OnBase Form Entry - Chartfield Request: New SpeedType, Program, Subclass

ChartField Request Information

This form is accessible through a link on the OUC Forms website. 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.

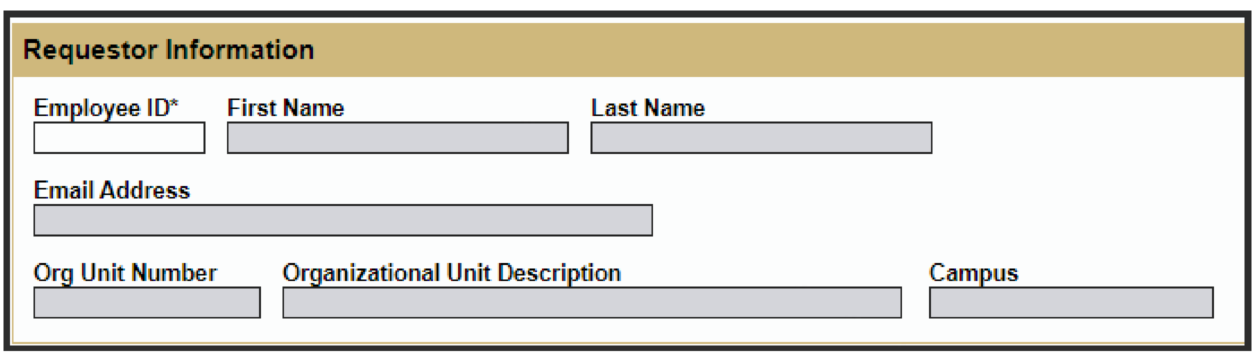

Purpose
Used to request new **SpeedTypes** not using Fund 34. This includes additions or changes to **Programs** and/or **Subclasses**.

For any other forms, please refer to the form directory.

ChartField Request Information | Attachments

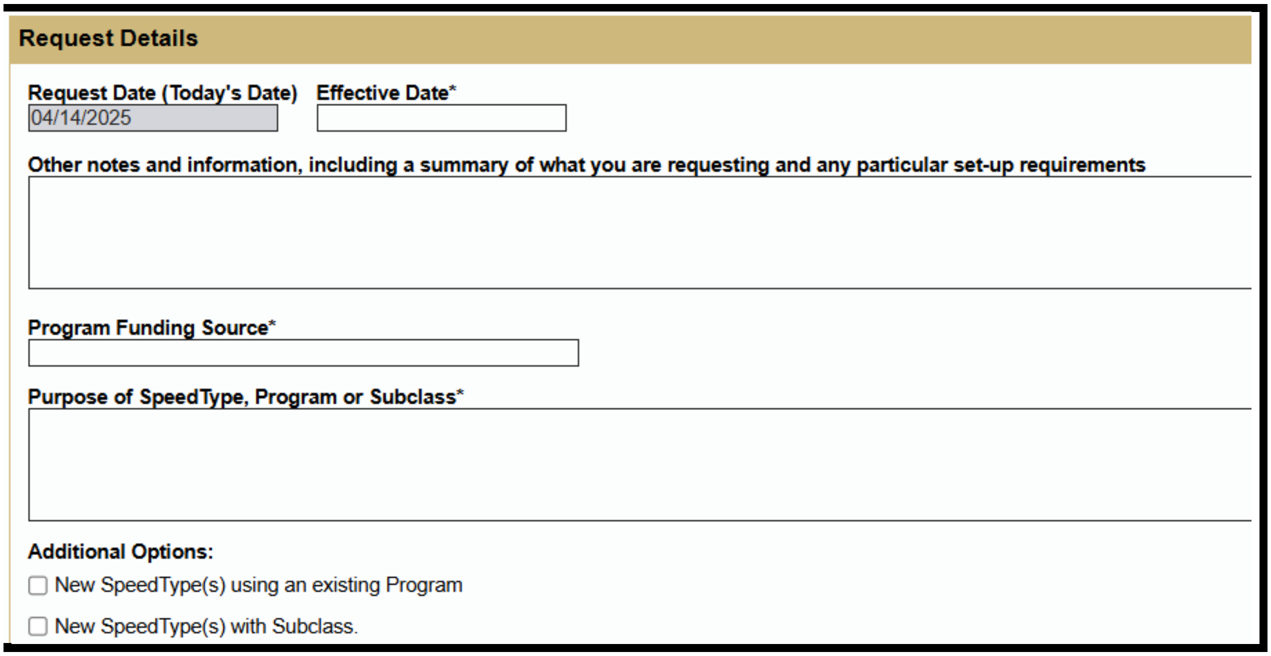
The **Requestor Information** section defaults with the current user's information. The Employee ID in this section controls campus routing.

- 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 OUC Forms page.
- Choose any appliable **Additional Options.**


Request Details

Request Date (Today's Date) 04/14/2025

Effective Date*

Other notes and information, including a summary of what you are requesting and any particular set-up requirements

Program Funding Source*

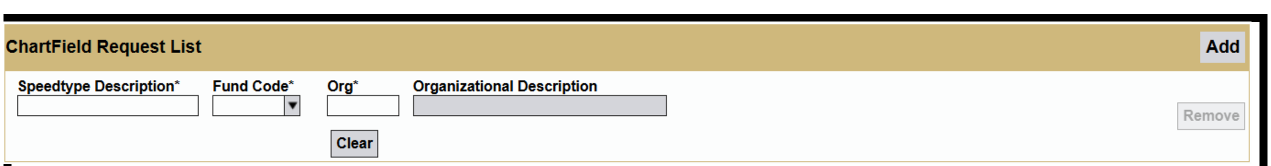
Purpose of SpeedType, Program or Subclass*

Additional Options:

- [ ] New SpeedType(s) using an existing Program
- [ ] New SpeedType(s) with Subclass.

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

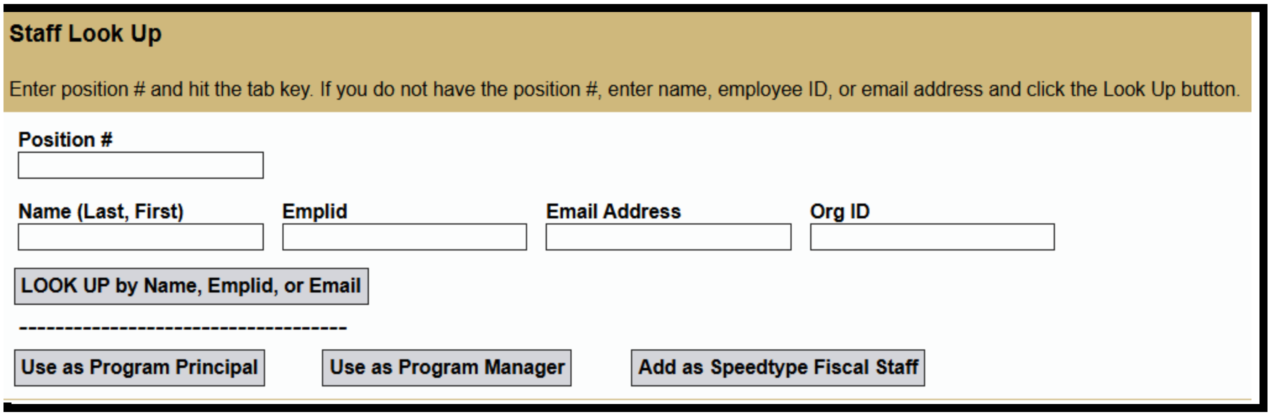
Speedtype Description* | Fund Code* | Org* | Organizational Description

Clear

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**.

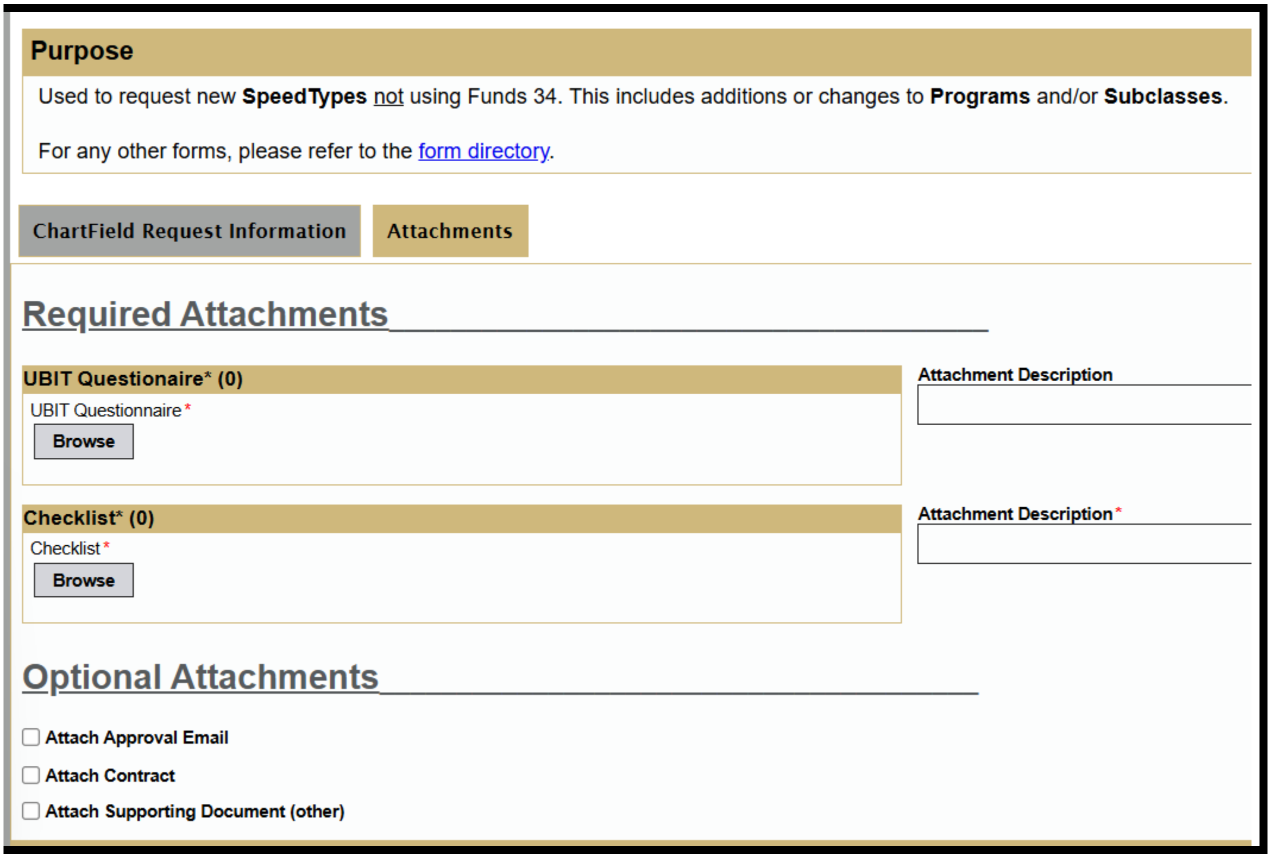


- To look up a person, enter the **Position #** and click the Tab key. The **Name**, **Emplid**, **Email Address**, and **Org ID** fields will autofill. If you do not have the position number, enter information **Name** (using upper/lower case and the format Lastname,Firstname) OR **Emplid** OR **Email 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**.

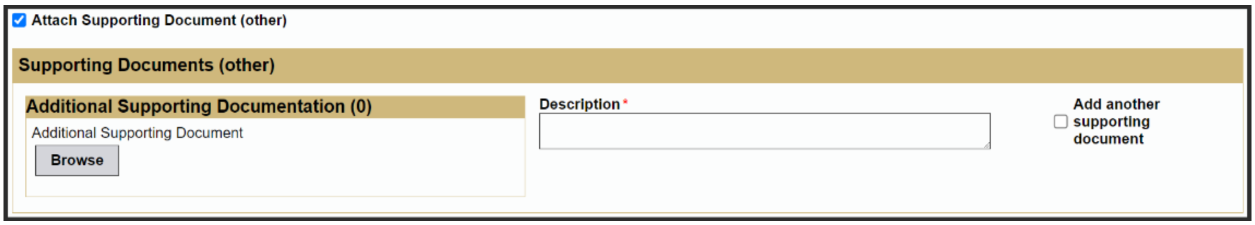


Complete the sections under the **Required Attachments** heading.

- *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.



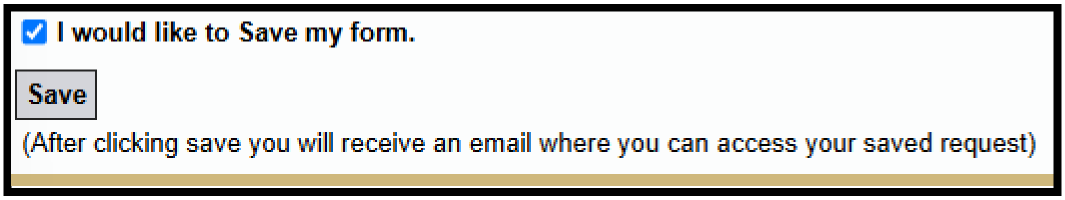
A section will appear for each type of optional attachment you select.

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

Submitting and/or Saving

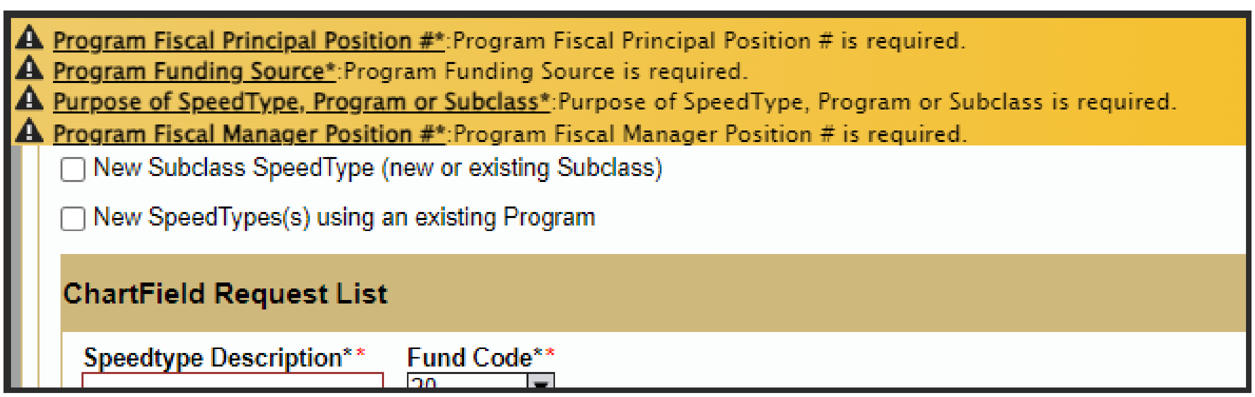
Once you have entered all the information that you have available, you can either save the form and return later or submit the form for approval.

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.



    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.*



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