

# Chartfield Requests

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# Summary

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# Chartfield Request System

- The Chartfield Request System allows you to submit electronic requests for new Project Segments for any of the following fund sources: State Appropriated, F&A, Grants, Foundations, University Endowments, Auxiliary Sales & Service, Agency, Debt, and Gifts/Loans. You are also able to submit requests to modify Project Segments for those same fund sources.
- The focus of today's training will be an overview Chartfield Requests for contracts and grants. Although much of the training can be applied to other sources of funding this is not meant to cover all aspects of the Chartfield Request System.

## Roles

- CF Initiator/ Requestor = Person Initiating the request
  - Department L5 Accounting Technicians for Contract and Grant Funding
- CF Request Department Approver = College Officer or designee
  - College of Research, Director of Research Administration for Contract and Grant Funding
- CF Request C&G Approver = Fiscal Manager or designee
- CF Request C&G Processor = Account Setup Specialist or designee

# Types of Requests

## Add Segment

- Split an award within the same college (multiple PI's)
- Split an award between separate colleges (non-lead college creates segment)
- Separate Program Income (if not set up by C&G)
- Separate Participant Support Costs (if not set up by C&G)
- Add a new segment when incremental funding requires separate tracking of funds

## Modify an Existing Segment

- Request modification to award attribute information (ex. Food Exemption & Fabricated Equipment)
- Request to add incremental funding to segment when awarded in RADAR
- De-obligation of segment

# Access Chartfield Request System

- To initiate a chartfield request you must first access the Chartfield Request System through MyPack Portal.

The screenshot displays the MyPack Portal navigation interface. At the top, there are tabs for 'MYPACK HOME', 'FOR FACULTY & STAFF', and 'MYTAB'. Below these, a 'Main Menu' dropdown is open, showing a list of categories: 'Employee Self Service', 'Student Self Service', 'Financial Systems', and 'Human Resources System'. The 'Financial Systems' category is highlighted in yellow. A secondary dropdown menu is open under 'Financial Systems', listing various sub-categories: 'Alerts', 'Assets & Surplus', 'Billing', 'Contracts and Grants', 'Interdepartmental Transactions', 'Journals & Chartfield M...', 'MarketPlace', 'Monitoring Tools & Rep...', 'Procurement', 'Purchasing', 'Service Center', 'Training', 'Travel', 'Vouchers & Vendor Maintenance', 'Worklist', and 'My Personalizations'. The 'Journals & Chartfield M...' category is highlighted in yellow. A third dropdown menu is open under 'Journals & Chartfield M...', listing specific options: 'Journal Entry', 'Project Maint & Inquiry', 'ChartField Values', 'Chartfield Request', 'Ledger Inquiry', and 'SpeedTypes'. The 'Chartfield Request' option is circled in red. The NC STATE UNIVERSITY logo is visible at the bottom left of the page.

# Add or Modify a Segment

- To initiate a new request within the system select the “Add a New Value” tab.
  - CF Request Type = Segment
  - Action Type = Add or Modify
  - Funding Type = Contract and Grants

CF Request System

Find an Existing Value **Add a New Value**

Business Unit: NCSU1

CF Request ID: NEXT

CF Request Date: 02/20/2012 

CF Request Type: Segment

CF Request Action: Add

CF Request Fund Group: Contracts and Grants

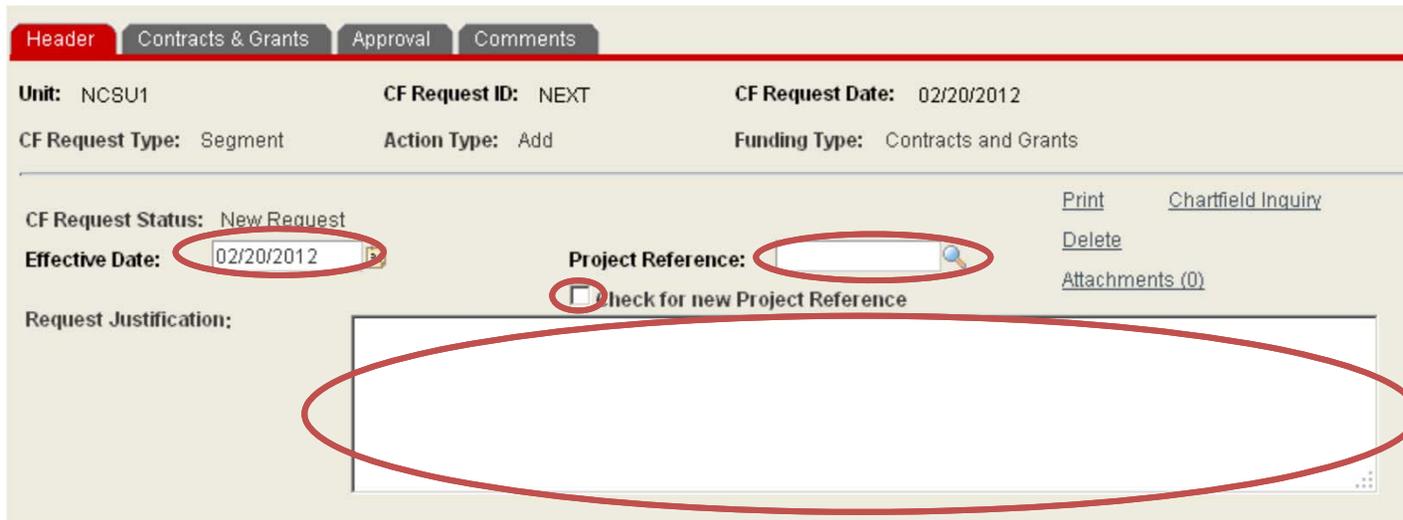
Add

## Note:

- An initiator only has access to request a segment or modify a segment within their own OUC range.
- All supporting documentation should be collected prior to initiating the request and uploaded into the system prior to approving.
- The funds to add or modify a segment must exist within the Prime, at the time of the request.

# Header Panel

- The initiator is responsible for the following fields:
  - Effective Date = will default to current date
  - Project Reference = Project ID (5 account)
    - The new Project Reference box must be checked for Program Income Specific Segments.
  - Request Justification = nature or purpose of the request
    - Be sure to answer the question: **Why do you need a segment?**



Header | Contracts & Grants | Approval | Comments

Unit: NCSU1      CF Request ID: NEXT      CF Request Date: 02/20/2012  
CF Request Type: Segment      Action Type: Add      Funding Type: Contracts and Grants

CF Request Status: New Request      [Print](#)      [Chartfield Inquiry](#)  
Effective Date: 02/20/2012      Project Reference:       [Delete](#)  
 Check for new Project Reference      [Attachments \(0\)](#)

Request Justification:

## Header Panel (Cont.)

- Long Description = Project Title
  - This description must match the long title in WRS. You can open a separate window and copy and paste to insure accuracy.
- Is this project reportable as part of an Auxiliary, Center or Institute? If the response is Yes, select **Yes** from the dropdown box and **enter** the **Auxiliary, Center/Institute name** in the box provided.

Long Description:

Reportable as Auxiliary, Center/Institute?

If Yes, please specify name of Auxiliary, Center/Institute:



# Contract & Grants Panel

- The initiator is responsible for the following fields:
  - Sponsor Name = Sponsor Agency of the Prime Agreement/ Award.
  - Proposal Number = RADAR Number
  - Segment Award Amount = Amount of the Request
    - If F&A dollars apply, make sure these dollars are included in the request amount.

The screenshot displays a web form titled "Contract & Grants Panel" with a navigation bar containing "Header", "Contracts & Grants", "Approval", and "Comments". The "Contracts & Grants" tab is active. The form contains the following information:

**Unit:** NCSU1      **CF Request ID:** NEXT      **CF Request Date:** 02/20/2012  
**CF Request Type:** Segment      **Action Type:** Add      **Funding Type:** Contracts and Grants

The main form area contains several input fields:

- Sponsor Name:** A text input field circled in red.
- Proposal Number:** A text input field circled in red.
- Segment Award Amount:** A text input field circled in red.
- Cost Share Amount:** A text input field.
- Project Start Date:** A date input field with a calendar icon.
- Project End Date:** A date input field with a calendar icon.
- Budget Begin Date:** A date input field with a calendar icon.
- Budget End Date:** A date input field with a calendar icon.

## Contract & Grants Panel (Cont.)

- Cost Share Amount = Required or Voluntary Cost Share dollars committed for this segment in the Prime Agreement/ Award.
- Project Start & End Dates = Project Dates
  - The dates cannot be earlier or later than the Prime Award dates. This means the dates must be equal to or within the Project Dates.
- Budget Start & End Dates = Budget Dates
  - The dates cannot be earlier or later than the Prime Award dates. This means the dates must be equal to or within the Budget Dates.

Header **Contracts & Grants** Approval Comments

Unit: NCSU1 CF Request ID: NEXT CF Request Date: 02/20/2012  
CF Request Type: Segment Action Type: Add Funding Type: Contracts and Grants

Sponsor Name	Proposal Number	
<input type="text"/>	<input type="text"/>	
Segment Award Amount	Project Start Date	Project End Date
<input type="text"/>	<input type="text"/>	<input type="text"/>
Cost Share Amount	Budget Begin Date	Budget End Date
<input type="text"/>	<input type="text"/>	<input type="text"/>

## Comments Panel

- The initiator should include comments for the approver if they have additional information regarding the request that are not captured in the selected pull down menus or the attached support documentation of the Chartfield Request.
- To add or remove comment boxes press the + or – symbols. The user can enter information in several comment boxes if necessary.

# Adding Attachments

- Press the **Attachments (0)** hyperlink on the Header Panel to attach documents.
- The acceptable file forms for attachments are Word, Excel, PDF and standard text files.
  - DO NOT attach copies of reports that can be easily regenerated in Financials, such as WRS report printouts, Journals, IDT printouts, attribute screenshots, etc.
  - DO NOT attach oversized files (i.e., an extremely large excel file).

The screenshot shows a web interface header panel with the following elements:

- Navigation tabs: Header (selected), Contracts & Grants, Approval, Comments.
- Unit: NCSU1
- CF Request ID: NEXT
- CF Request Date: 02/20/2012
- CF Request Type: Segment
- Action Type: Add
- Funding Type: Contracts and Grants
- CF Request Status: New Request
- Effective Date: 02/20/2012 (with a calendar icon)
- Project Reference: [input field]
- Check for new Project Reference
- Print
- Chartfield Inquiry
- Delete
- Attachments (0)** (circled in red)

## Supporting Documentation

- Email from Lead PI – Approving the addition or modification of a segment. Should include specifics such as Prime Project ID, period of approved segment, and amount approved.
- Email from Lead College CRO- Approving the addition or modification of segment. Should include specifics such as Prime Project ID, period of approved segment, and amount approved.
- Approved Budget/ Budget Justification – The budget and budget justification that was approved by the sponsor and should be available in RADAR record.
- Food Cost Exemption Form – If requesting grant attribute modification to allow for food costs based on approved budget. Available online: <https://cng.ncsu.edu/cng-docs/forms/food-cost-certification.pdf>
- Fabricated Equipment List of Components- If requesting grant attribute modification to allow for fabricated equipment based on approved budget.
- Email from Fiscal Manager- If de-obligation is requested this should be verified in email from FM. Include dollar amount to be de-obligated.

# Supporting Documentation Required Based on Request Type

Request Type	Required Documentation
Add Segment- Within the same college	Email from Lead PI Approved Budget/ Budget Justification
Add Segment - Separate college	Email from Lead PI Email from Lead College CRO Approved Budget/ Budget Justification
Add Segment - Program Income (if not set up by C&G)	Approved Budget/ Budget Justification
Add Segment- Participant Support Costs (if not set up by C&G)	Approved Budget/ Budget Justification
Add Segment – When incremental funding requires separate tracking	Approved Budget/ Budget Justification
Modify Segment- Change award attribute information	Approved Budget/ Budget Justification Food Exemption Form (if applicable) Fabricated Equipment List of Components (if applicable)
Modify Segment- Add incremental funding awarded in RADAR	Email from Lead PI Email from Lead College CRO Approved Budget/ Budget Justification
De-obligation of Segment	Email from Fiscal Manager

# Approval Panel

- Press the **Save** button prior to proceeding.
  - It is recommended you save throughout the entry process but it is required before submitting request.
- To submit the request and initiate the routing and approval process, press the submit button. The CF Request ID will be established on the save request.
- Make sure the Approval Action field indicates **Approve**, then press **Save** and **Submit**. This field indicates the type of action that will occur by pressing the Submit button.

Header | Contracts & Grants | **Approval** | Comments

Unit: NCSU1      CF Request ID: NEXT      CF Request Date: 02/20/2012  
CF Request Type: Segment      Action Type: Add      Funding Type: Contracts and Grants

Status: New Request  
Auxiliary Reporting: N

**Submit**  
Transfer to Attributes

Approval Status Find First 1 of 1 Last

Business Unit:	NCSU1
Approval Check Active:	y
Approval Action:	Approve
Comments for Denial Email:	<input type="text"/>

▶ Approval History

# Approval History

- Once the request has been submitted for approval you can view the Approval History Section.
- The CF Request Approval box indicates the name, date and time of the approvals.
- Approval routings are based on the first two digits of the department OUC on the request and then on the central office responsible for that request type or fund group.

## CF Request Approval



## PMR System vs Chartfield System

- This process does NOT circumvent or replace the PMR system. The PMR system MUST be used for the processing of all Prior – Project Modification Requests.
- The Chartfield Request System is to be used only to request the addition or modification of a segment that has already been approved by the sponsor. If this is not the case you should first go through the PMR system for approval.

## Next Steps....

- Business Officers and Department L5 accounting technicians will be granted CF Initiator Role access for department OUC.
- Once this is completed L5 accounting technicians will be responsible for requesting the addition or modification of a segment through the Chartfield Request System.
- Approval of the Chartfield Requests for Contract and Grant Funding will be approved in the College of Sciences Research Office.

**Questions?**

