FLOWCHART FOR CHARTFIELD MODIFICATION

Need for a new Chartfield or modification to an existing Chartfield value identified

Determine type of Chartfield to be added or maintained

Account Code → Complete Account Chartfield Modification Form → Submit for approval to DSFP and CFAS → DSFP and CFAS to determine the reporting structure of the account

Fund Code → Complete Fund Chartfield Modification Form

Is this related to research?

Yes → Submit for approval to CFAS → CFAS to determine the impact for HERDC reporting

No → Submit for approval to DSFP → FBS to create/modify the chartfields in the Financial System

Department → Complete Department Chartfield Modification Form → Submit for approval to DSFP → DSFP to determine the Parent/Child node Reporting to New Department → Submit for approval to the Director of Finance

Project ID

Is this a research project?

Yes → Project ID created in Financial System thru Interface from InfoEd

No → Complete Project Chartfield Modification Form → Submit for approval to the approving manager

Is this a research project managed thru InfoEd (GMO)?

Yes → Project ID created in Financial System thru Interface from InfoEd

No → Management Accountants create the Project ID in the Financial System

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