

Compass Chartfield Value Request Form

Please submit completed form to compass@emory.edu with subject "CHARTFIELD REQUEST"

CONTROLLER'S OFFICE NOTIFIES THE REQUESTOR AND APPROVER WHEN REQUEST IS COMPLETE

Requestor Name _____

Phone _____ Email _____

Approved by (Operating Unit CFO/Business Officer) _____

Phone _____ Date _____

List the email addresses, if additional individuals should be notified:

Create Modify Inactivate Requested for the following Chartfield Value:

Business Unit _____

Operating Unit _____

Fund Code _____

Class Code _____

Account _____

Account in cash range 10XXX does not require Finance Subcommittee Approval, only notification.

Reason for Request (REQUIRED):

Chartfield Description (REQUIRED FOR CREATE/MODIFY):

Short Description (limit 10 characters): _____

Long Description (limit 30 characters): _____

If Account is checked above, continue on next page.

Compass Chartfield Value Request Form**Account (Create/Modify):**

Set ID:	Date:
<input type="checkbox"/> University	9/1/2009
<input type="checkbox"/> Healthcare	1/1/1901
<input checked="" type="checkbox"/> Share	1/1/1901

Account (Create Only):

Account Type:	Attributes:
<input type="checkbox"/> Asset	<input type="checkbox"/> Control
<input type="checkbox"/> Liability	<input type="checkbox"/> Budgetary Only
<input type="checkbox"/> Revenue	<input type="checkbox"/> Statistical
<input type="checkbox"/> Expense	<input type="checkbox"/> None of the Above

Is this a Payroll Liability or Payroll Expense Account?

- Yes *[When Payroll Liability, Set up Payroll Sweep]*
- No

IMPORTANT NOTICE: The Finance Subcommittee via the Controller's Office will require Business Units requesting a balance sheet account to prepare monthly reconciliations of the account on Blackline. The charge for this will be \$65/month (new subscribers). For additional information, please contact the Controller's Office at compass@emory.edu

For Controller's Office Use:Finance Sub Committee Approved: Yes No

Reason: _____

For New Balance Sheet Account, this Section is completed by the Controller or Associate Controller

Blackline Preparer Name: _____ Phone: _____

Reviewer Name: _____ Phone: _____

Approver Name: _____ Phone: _____

Smartkey to be charged \$65 per month for new Balance Sheet Account _____