

NON SPONSORED PROJECTS and UNRESTRICTED OPERATING FUNDS

Compass PROJECT or SMARTKEY Create/Modify 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 Requested for the following Chartfield Value:

[For a **CREATE REQUEST** do not write on the lines below, Controllers' Office will complete]

<input type="checkbox"/> Project	_____
<input type="checkbox"/> Smartkey	_____
<input type="checkbox"/> Smartkey	_____

Reason for Request (REQUIRED):

The Reason for Request and attachments need to support fund code and class code assigned.

Chartfield Description (REQUIRED):

Long Description (limit 30 characters): _____

Section I: Project

Project Type:

- | | | |
|--|--|--|
| <input type="checkbox"/> Affiliate Entity (Agency) | <input type="checkbox"/> Capital Project | <input type="checkbox"/> Department Initiative |
| <input type="checkbox"/> Discretionary Fund | <input type="checkbox"/> Endowment Expendable Income | <input type="checkbox"/> Endowment Principal |
| <input type="checkbox"/> Gift | <input type="checkbox"/> Info Technology Capital Project | <input type="checkbox"/> Minor Repairs & Renovations |
| <input type="checkbox"/> Service Center | <input type="checkbox"/> Strategic Plan Project | <input type="checkbox"/> Other _____ |

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Funding Source(s):

Total Amount of Funding: \$ _____

 Internal transfer from (Attach relevant documents and provide Smartkey) _____ Unrestricted gift (List donor restrictions and attach donor documents)

 Restricted gift (List donor restrictions and attach donor documents)

 Payment for goods or services (Explain how these relate to the exempt purpose of the University)

 Funded by University budget process Other (Attach relevant documents) _____**Section II: Smartkey****REQUIRED:** Business Unit _____ Operating Unit _____ Department ID _____ Fund Code _____ Class Code _____**DEFAULT IS ZEROES:** Program _____ Event _____**COMPLETE ONLY FOR PROJECT:** Project Business Unit _____ [Usually PCOTH] Project _____ Project Activity _____