

Cal Poly Pomona Budget Services Dept. Id and Class Chartfield Request Form

Requested by (Name): _____ Date: _____

Department: _____ Division: _____

Purpose for request: _____

Chartfield:

New Dept/ Class Name: _____

Dept: ☐

New ☐

Reclass* ☐

*For dept reorganization please
attach organization chart

Class: ☐

Capital Project ☐

Ongoing Project ☐

Fee Revenue ☐

Other: _____ ☐

Fund affected:

General ☐

Capital Outlay ☐

Housing ☐

Reimbursed ☐

Continuing Education ☐

Lottery ☐

Parking ☐

Other _____ ☐

Source of Funds:

Cash Posting Order ☐

Existing Resources ☐

Other _____ ☐

Accounts affected: (check all that apply)

Operating Expense & Equipment ☐

Salaries and Wages* ☐

*if selected, attach a list of positions to be moved

Please provide distribution information for financial reporting purposes (Name and title only):

1. _____

2. _____

3. _____

Tree Management (Please refer to the Tableau Finance Department Tree dashboard):

Director Tree Level: _____ Date: _____

AVP/Dean Tree Level: _____ Date: _____

For Budget and Financial Reporting Use ONLY

Accounting: _____

Date: _____

Budget: _____

Date: _____

Effective Date: _____

New Dept. Id: _____ New Class: _____

Added to tree: _____

Change or add HR Account Code on DBT: _____

CDIP: _____

☐ Undesignated

☐ Designated

☐ Fee Revenue