

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 <input type="checkbox"/>	Continuing Education <input type="checkbox"/>
Capital Outlay <input type="checkbox"/>	Lottery <input type="checkbox"/>
Housing <input type="checkbox"/>	Parking <input type="checkbox"/>
Reimbursed <input type="checkbox"/>	Other _____ <input type="checkbox"/>

Source of Funds:

Cash Posting Order <input type="checkbox"/>
Existing Resources <input type="checkbox"/>
Other _____ <input type="checkbox"/>

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