# **UNT** | SYSTEM

**PCBU** 

**PCBU** 

Org Dept

Org Dept

**Fund Cat** 

**Fund Cat** 

Fund

Fund

### **Capital Project ID Request & Budget Entry Form**

Email completed form and all required documents to <a href="mailto:coarequest@untsystem.edu">coarequest@untsystem.edu</a>

R	equestor Inforn	nation:							
	Nar	me:							
Email:		nail:	Phone:						
Department:		ent:					Bus	siness Unit:	
	Request Da	ate:							
P	roject Informati	on:							
	Prio	rity:		Add		Modi	fy	lr	nactivate
Project Start Date:		ate:	Project End Date:				Γ	Please Ir	
Project Manager:		ger:						Campus Managed	System Managed
Proiec	t Name/Descript	ion:						Minor Cap.	Minor Cap.
(30 Character Limit)							N	Major Cap	Major Cap
(Pleas	Funding: se enter amount for each funding type)	Debt Designated		Auxilia		Other	EAF	C	Gifts
		Code, Mu			ts by Fund S	down by Fund	d Type a	and Fiscal Year.	xiliary-Exact Fund
	Project Approv	val:				and	apital im /or PMW	provement /eb Project Number:	
Executive Project Approval:  (Only required for Campus Managed, Minor Cap Projects)		naged,				(to		Project ID:	
P	Project Budget D	Detail:							
PCBU	Org Dept	Fund Cat	Fund	Function	Program	Purpose	Site	Project Type	Budget Amount
PCBU	Org Dept	Fund Cat	Fund	Function	Program	Purpose	Site	Account	Budget Amoun

NOTE\* This section is only related to the project budget and NOT intended to function as a transfer approval. If a transfer of funds is required, a separate Account/Budget Authorization Form (ABA) will need to be completed. If more lines are needed, please attach additional pages as necessary and reference above.

Program

Program

Purpose

Purpose

Site

Site

Account

Account

**Budget Amount** 

**Budget Amount** 

Function

**Function** 

Campus Controller:	
Campus Controller Approval:	
Notes:	
Treasury Office	
Treasury Acknowledgment:	Debt Source:
_	
Notes:	
	Select the Debt Indicator Check Box on Project Supplement Data page
COA Administration	,
COA Administration	
System Budget & Planning Approval:	Project ID
Entered By:	Description:
	Entry Date:
Local Budget Office	
Budget Entry	

## **UNT** | SYSTEM<sup>®</sup>

#### **Capital Project ID Request Form Instructions**

Complete as much information as possible regarding the requested chartfield. Required fields are marked with an asterisk.

Name:\* Individual to contact if there are questions regarding this request.

Email:\* Email address for the contact person.

Phone:\* Phone number for the contact person.

Department:\* Department of the requestor.

Business Unit:\* Business Unit of the requestor (SY769, NT752, HS763, DL773)

Request Date:\* Date the request is made. Form defaults to the current date.

Priority: Standard is the default. May change to a higher or lower priority if desired.

Low: A minor issue or general inquiry.

Standard: Routine support requests that impact a single user, or a non-critical error.

High: Non-critical but a significant issue affecting a single user, or an issue degrading the performance and reliability of the Chart of Accounts; however, the COA is still operational.

Critical: A problem or issue impacting a significant group of users or any mission critical issue affecting a single

Effective Date:\* Effective date in PeopleSoft that will allow transactions to occur using this chartfield.

Request Type:\* Select if the request is for a new chartfield, modification to a chartfield, or to inactivate a chartfield.

### Capital Project ID Request & Budget Entry Form Process Documentation

Purpose	To outline the process for requesting a new capital project ID value and entering the budget into EIS.
Frequency	The ChartField Request form is submitted on an as-needed basis.
	Refer to the "ChartField Request Form Instructions" and "ChartField Descriptions" for detailed definitions of the fields on the form.

STEP	PROCEDURE
1	System Strategic Infrastructure Planning & Construction (SIPC) and/or campus Facilities Offices identifies need for a new capital project value ID and obtains necessary approvals to begin work(ex: Board of Regents).
2	Requestor completes "Requestor Information," "Project Information," and "Project Budget" sections and sends the form, and any relevant documentation to <a href="mailto:COARequest@untsystem.edu">COARequest@untsystem.edu</a> .
3	Financial Systems Support (FSS) forwards the document first to the campus Contoller who reviews and approves that the project qualifies as a Capital Project.
4	Once approved by the campus Controller, the request is forwarded to Treasury who reviews, signs and returns as acknowledgement to System Budget and Planning.
5	System Budget and Planning approves the form and assigns Project ID.
6	Once approved by System Budget & Planning, the form is returned to FSS for entry into PeopleSoft.
7	Once the request is processed, Financial Systems Support will notify the requestor and send mass email communication of the new Project value.
8	The form is forwarded to local Budget Office for entry of the budget into EIS. Budget Office signs and returns form as acknowledgement of budget entry.

If requests are denied or not made to the satisfaction of the requester or any other Note: party, issues should be escalated to Jim Gross or Paige Smith.

It is recommended users submit a COA Chartfield Request form for a new Site when a new building project is established.