

Project Chartfield Request Form

The following table lists, by section, the Project Chartfield Request Form fields, their definitions and if it is required:

Section	Field	Field Description	Required / Optional
Project			
	Business Unit	General classification of a Project - General, Capital and Sponsored	Required
	Description	Project Title	Optional
	Short Description	Short description of Project	Required
	Project Type	Further breakdown of fund chartfield	Required
	Project Start Date	Project Start Date	Required
	Project End Date	Project End Date	Required
General			
	Owning Department	Responsible Department	Required
	Default Expense Function	Categorizes expenses for Project	Required
	Default Fund	Fund Chartfield – captures funding sources by broad category	Required
	Owning Initiative	Responsible Initiative - to calculate retained earnings	Optional
	Owning Segment	Responsible Segment - to calculate retained earnings	Optional
	Current	Current / Non Current	Required
	Capitalization	Project Capitalization flag	Optional
	Central	Central/Non-Central flag	Required
	Commitment Year	Recruitment Commitment Year	Optional
	Potential UBIT Activity	Potential Unrelated Business Income Tax (UBIT) Activity flag	Optional
	Financial Reporting Frequency	Financial Reporting Frequency	Optional
Gifts/Endowments			
	Purpose Code	Gift purpose code	Optional
	Investment Pool Set	E.g. pooled, separately invested, split-interest agreement	Optional
	Bank Account	Bank Account #	Optional
	NYPMIFA Code	New York Prudent Management of Institutional Funds (NYPMIFA) Code	Optional
	Gift Number	Advance Gift Number	Optional
	Reinvestment	Reinvestment flag	Optional
	Additional Distribution	70 Base Point flag	Optional
	Income Distribution	Income Distribution - UR or TR	Optional

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Capital Projects			
	Project Use	High-level classification used in reporting to Trustees; delineates how project supports University goals and objectives	Optional
Sponsored Projects			
<i>Award Demographics</i>			
	Sponsor	Direct Sponsor on award	Optional
	Competitive Award Issue Date	Competitive Award Issue Date	Optional
	Funding Mechanism	Cost Reimbursement Contract, Grant, Fixed Price Contract, Cooperative Agreement	Optional
	Award Start Date	Award Start Date (Full awarded dates)	Optional
	Award End Date	Award End Date (Full awarded dates)	Optional
	Cost Share Project	Project used to track cost share on this award (project)	Optional
	Research Type	Basic, Applied Research, Development	Optional
	Originating Sponsor	Pass-through Sponsor for Award	Optional
	Originating Sponsor Award Number	Pass-through Award Number	Optional
	Originating Funding Mechanism	Cost Reimbursement Contract, Grant, Fixed Price Contract, Cooperative Agreement	Optional
	CFDA	Catalog of Federal Domestic Assistance (CFDA) #	Optional
	ARRA	American Recovery and Reinvestment Act (ARRA) Funding type	Optional
	Cost Share Amount	Total amount of committed cost share with Project	Optional
Billing and Reporting			
	Bill Frequency	Bill Frequency	Optional
	SBSP Reporting	SBSP Reporting Requirement flag	Optional
	Billing Location	Sponsor Billing Address Location	Optional
	Bill Type	Cost Reimbursable, Letter of Credit (LOC), Letter of Credit (LOC) Special, Manual, Schedule Payment, Department	Optional
	LOC Document	Letter of Credit Document ID	Optional
	Sponsor PO	Sponsors Purchase Order Number for Billing	Optional
Other Indicators			
	Clinical Trial Identifier	P&S or Non P&S	Optional
	CTV	Project managed by Columbia Technology Ventures flag	Optional
	E-Verify Effective Date	E-Verify Date	Optional
	Interest Bearing	Account where Funds must be kept	Optional
Project Team			
	Project Team Empl ID	Employee ID and name of project team members	Optional
	Project Role	E.g. Project Manager, PI, CoPI	Optional
	Project Manager	Designates one team member as the project manager	Optional
	Role Start Date	Project team member start date	Optional
	Role End Date	Project team member end date	Optional
Project Activity			
	Activity	Defines use of scope (scaffolding, budget year)	Optional
	Activity ID Description	Activity name or description	Optional
	Additional Information	Any supporting information for the Project and/or Project Activity	Optional
	Request Justification	Information regarding the need for such request	Optional

