Requesting a New Endowed Project

The NUFinancials Chartfield Maintenance request form allows staff with access to NUFinancials to request a new chartfield value or update to an existing value. New endowed Project ID requests require additional review to ensure proper Chartfield setup. The process is outlined below.

Gift Acceptance & Fund Management team works with school/unit to establish endowed project

- x Department ID and project attributes/purpose are determined based on the gift agreement

Gift Acceptance and Fund Management submit Chartfield Request in NU Financials and must be approved Accounting Services

- x The department, Gift Acceptance and Fund Management, and Accounting Services are required to review the Chartfield request before it can be approved
- x Any additional parties to be notified of project completion must be explicitly included in Question 3

Financial Operations IT update NUFinancials

- x Once the system is updated, Chartfield Maintenance notify multiple interested parties, including the school/unit, that the project has been created or updated via email
- x If applicable, a spending budget is established at this time

Gift and Record Services will reallocated of any gifts

Please note the following:

- x For any changes to active endowed projects, such as attribute changes, department changes, or name updates, please contact Gift Acceptance and Fund Management before making changes to NUFinancials. They will update fund memo and review for compliance with the gift agreement
- x Set up and updates to expendable gifts are processed by the department. Additional information can be found here

Please reference the Chartfield Maintenance website and guaaart27(b)-0i   thf AS3(q(A)1u3(t)-3(h)26.7(

Chartfield Maintenance

Key Contacts
Chartfield Maintenance, Accounting Services at
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