

Chartfield Modification Form - Instructions

Project ID: Enter the existing project ID for which a modification is being requested. REQUIRED

Advance ID: Enter the existing allocation for which a modification is being requested. REQUIRED

Current Project Type: Enter the project type from the dropdown list. REQUIRED

Modification

Request: Complete **ONLY** the fields for which a modification is being requested.

Start Date: Provide the new Start Date.

Change in Status: Pick from dropdown if changing the status (Active, Pending, etc.)

Short Description: Provide the new requested short title (only shows in Financials). Cannot be more than 30 characters. FAI reserves the right to change for naming conventions.

Research (AG only): This field is only used by the Ag Foundation for special reporting.

Advance Long Title: This title can be no more than 60 characters. It is the title that is printed on gift receipts. If there is an MOU, backup must be provided. We will also update the Long Description in financials unless noted otherwise.

Reportable as Center: Yes or No field to determine if this project is reportable as an official University Center. If yes, provide the Official Center Name. (FAI will use this name to determine correct code.)

Responsible Person: Provide the new title (and name if necessary) of the new responsible person for project. This field requires the approval of the **current** responsible person's supervisor if the current responsible person is no longer available.

Dept ID: This is sometimes referred to as the OUC. Comment describing reason for change is necessary. This field requires Responsible Person approval.

Organization: Change in the Organization (example; AG-4H, AG-TTF, NCSU-Art). Use dropdown list.

Purpose of Fund: This field is used if there is any change to the purpose of the fund. Responsible person approval is required and this may result in a need to go back to donors.

Program Code: Change in Program Code. Use dropdown list. This field requires Responsible Person approval.

Primary Fund: Change in Primary Fund could be necessary if the purpose changes. Choose from dropdown menu

Secondary Fund: Change in Secondary Fund could be necessary if the purpose changes. Choose from dropdown menu

Full Endowment Amount: Used if there is any change in the level in which this fund will be endowed. Also requires a copy of the revised MOU.

Other: This can be used for any other changes, including Report Code, etc

Reason/Justification: REQUIRED FIELD

**Responsible Person
Approval:**

The field is for the CURRENT responsible person. The printed name should be included as well as an actual signature, not a stamp or proxy, (an email from the current responsible person may be attached in place of the signature). Required for any field listed in gray on the form (Responsible Person, Dept ID, Purpose, Organization, Program Code, Primary Fund and Secondary Fund).

**Advancement
Services Approval:**

This section is required for changes to Purpose, Organization, and Full Endowment Amount. Changes to these fields may require additional changes to fields controlled by Advancement Services. Drop Downs included.

FOR PROCESSING:

Submit by email to Nadirah Muhammad and copy Davan Wattley.
nmuhamm@ncsu.edu cc: dgwattle@ncsu.edu