



Chartfield Maintenance (CFM) Application: Support and FAQs

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General Questions

What is Chartfield Maintenance (CFM)?

Chartfield Maintenance is an application with forms and workflows that automates and streamlines all requests for creating, modifying, and inactivating chartfield segments (Account, Org, Program, Project) in FAME. The application includes built-in review and approval flows.

Additionally, requests are easily searched and tracked in both ServiceLink and the Chartfield Maintenance application.

When do I use Chartfield Maintenance (CFM)?

Use the CFM forms to *Create, Modify, Reactivate* and *Inactivate* the following chartfield segments :

- A. Account
- B. Organization unit
- C. Program for Undesignated Operating Funds (Funds 10, 12, 14, 16, Global Funds, NYUAD Funds, NYUSH Funds)
- D. Program and Project for Fund 20 (Management Designated)
- E. Program and Project for Fund 22 (Restricted Gift)
- F. Program for Endowment Funds (Funds 41, 42, 43, 45 and 46)
- G. Program for Fund 40 (Investment)
- H. Program for Fund 44 (Annuities and Life Insurance)
- I. Program for Fund 60 (Service Centers)

Are Sponsored (Fund 24 & 25) and Capital (Fund 52) Funds included?

No. As requested by business owners, the existing process for funds 24, 25 and 52 will remain the same.

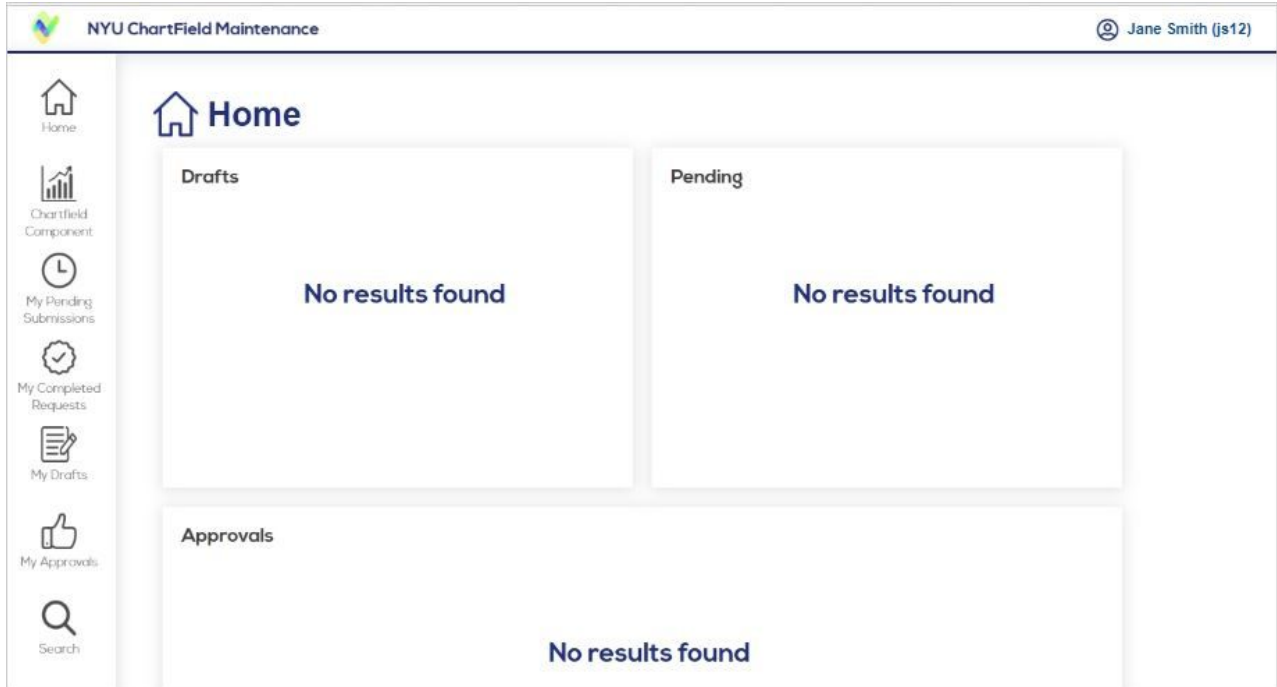
Getting Started

How do I access the CFM forms?

Log on to **NYUHome** and navigate to the [Chartfield Maintenance Application card](#)
Or bookmark this URL: <https://bpasprod.its.nyu.edu/cfm/jsp/home.jsp>

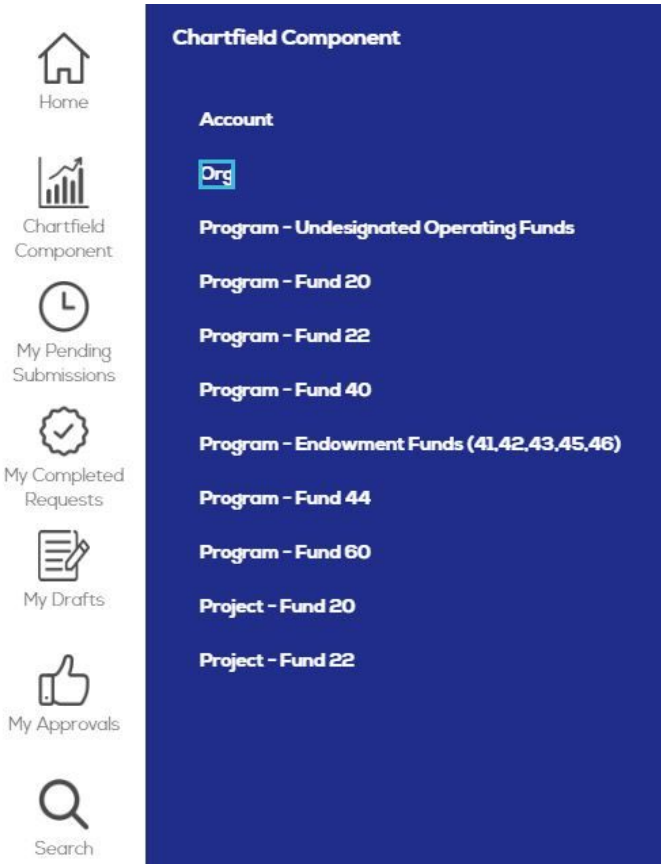
CFM Home screen

This is the CFM Home Screen and landing page. In the center you will see a snapshot of your *Drafts, Pending Requests, and Approvals*. To view these in more detail click the corresponding icon from the left sidebar menu.

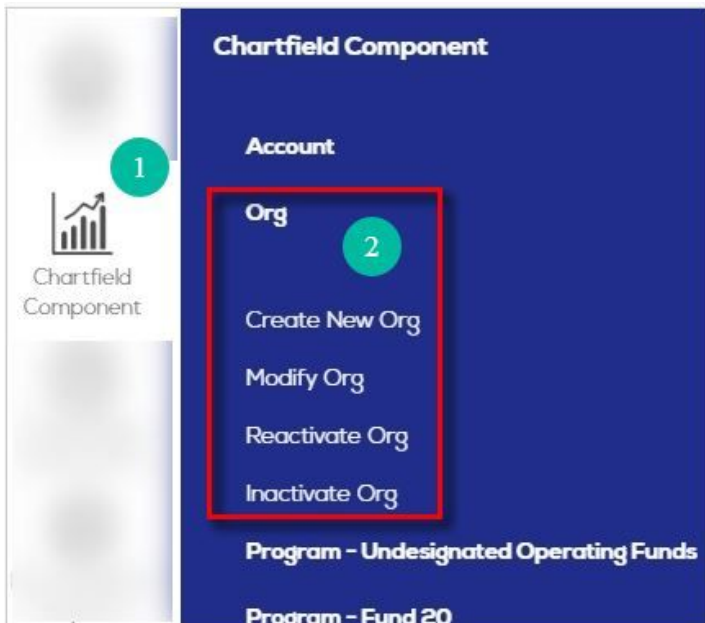


Requesting Chartfield Segments

Select *Chartfield Component* from the left sidebar menu. Select the component (*Account, Org, Program, etc*) and click *Create, Modify, Reactivate or Inactivate* to request your changes.



In the example below, Org was selected and you see the options to then click *Create New Org*, *Modify Org*, *Reactivate Org* and *Inactivate Org*.



I do not see the Chartfield Maintenance Forms card on my Work tab

Contact AskFinanceLink@nyu.edu or 212-998-1111

Why can't I access CFM forms?

Confirm you have access to CFM. Contact AskFinanceLink@nyu.edu if you do not see the CFM card on the Work Tab, or if you receive an error message. Please be sure to attach a screenshot of any error messages.

What if I get an error message when trying to access the CFM forms?

Confirm you have access to CFM. Contact AskFinanceLink@nyu.edu if you do not see the CFM card on the Work Tab , or if you receive an error message. Please be sure to attach a screenshot of any error messages.

What to do when I have errors issues using the forms?

Please send an email with a screenshot of the error message to AskFinanceLink@nyu.edu

Can multiple/mass chartfield requests be submitted using CFM ?

This is a phase II enhancement and will be available in the coming months. A communication will be sent when this has been launched.

How do I search for a Request?

Go to the CFM Home page and select **Search** from the left sidebar menu. Search for requests by:

- Request type
- Requestor's netid
- Request status
- Request id
- Submit Dates (a single date or a date range)
- Submit date
- Program Code
- Project Code

Best Practices

1. Complete all mandatory fields (*denoted by an asterisk*) and if appropriate optional fields.
2. Attach any relevant documents.
3. Use the “**Comment**” field to provide additional information that may be helpful for approvers and/or FSM.
4. When requesting a new **Org**, include all department and sub department grouping in the “Describe Chartfield Combination Usage” field in the *Create New Org* form. This will be useful when creating the hierarchy in DRM.
5. When requesting a new **Account**, please specify the account category in the “Describe Chartfield Combination Usage” field in the *Create New Account* form. This will be useful when creating the hierarchy in DRM.
6. When creating a **Program for Fund 20 and Fund 22**, include all projects which the new program will be used with in the “Comment” field in the *Create Program* form.
7. Org modifications for all Fund 20 and Fund 22 Projects with prior year activity will be queued up and processed during year end activities.
8. Org modifications for all endowment funds with prior year activity will be queued up and processed during year end activities.