CHARTFIELD MAINTENANCE

ACTIVITY NUMBER & DEPARTMENT MAINTENANCE REQUEST E-FORM INSTRUCTIONAL GUIDE

Requestor Instructions for

New Activity Number Request
A. The Three Choices of the Activity Nbr / Department e-Form

The new phase of the Activity Number & Department Maintenance Request e-Form was created to streamline the process of requesting, approving and documenting the following:

- a new department
- a department change
- a new activity number (including deactivation and changes to activity numbers and SpeedTypes)

Please log in to ImageNow using a MyAccounts Username and Password to fill out the Activity Number & Department Maintenance Request eForm.

The emphasis of this Instructional Guide is geared towards the requestor filling out the form for a new Activity Number, with additional comments on how to request changes, deactivations and department changes.
B. To Fill the Form for a New Activity Number

0. New Activity Number Request (also Changes and Deactivation)

To request a new activity number, as well as to make a change or for deactivation, select the “New Activity Number Request” radio button and click “start”.

![Image showing the form for a new activity number request]
1. Requested by / Contact Phone Number / Email Address:
These fields will populate automatically once logged in with MyAccounts Username and Password. Please confirm they are correct. You may need to enter your phone number.

2. New Activity Number Title:
This field is limited to 30 characters, so choose a description wisely.

3. Department ID:
The Department ID that the Activity Nbr will roll-up to needs to be entered in this field. There are several ways of entering the Department ID:

- Enter the 9-digit “Department ID” and this will automatically populate the description; or enter the first 5 digits and select from a dropdown list
- Or enter the first 5 letters of the department’s description and this will generate a list; select the applicable description from this list

**NOTE:** If this is an activity requested for a new department, the Department ID will be populated from the information entered in the “new Department” section of the e-form.

4. Site:
Select the Site code from the dropdown menu or enter the first five letters of the location or country in the “Site Description Box” and select from the dropdown list.

**Note:** If you need a new Site created, contact FSSS (Controller@fiu.edu) for further instructions.
5. **Funding Group:**

Select a “Funding Group” from the drop down menu. If the funding group is “Auxiliary Enterprises” or “Agency Fund”, it is necessary to select a “Guarantee Activity Nbr” as explained in step 9.

If the “Funding Group” is 300 – Auxiliary Enterprises, then please fill out and process the required **Auxiliary Package** located at: [http://aed.fiu.edu/downloads/Request_for_Auxiliary_Packet_(RAP).xlsx](http://aed.fiu.edu/downloads/Request_for_Auxiliary_Packet_(RAP).xlsx).

As of April 2016, please mail the packet to David Snider [dsnider@fiu.edu](mailto:dsnider@fiu.edu).

The main requirements Auxiliary have for opening new activity numbers are the following:

- Must have actual or forecasted revenue and/or expense activity of the least $10K each year
- Must be for a continuing operation, not a one-time event

6. **VP/Executive Area:**

Select a “VP/Executive Area” from the drop down menu. The VP/Executive Area is a high level rollup of your department within the University (i.e. Department 110401000 Office of the Controller Adm. rolls up to the Division of Finance). Please select the area associated with the Department ID in box 3 when completing the form.

*If the Executive Area is “Academic Affairs”, you are required to fill out the CIP box as explained in step 7.*

7. **CIP:**

CIP is a classification of instructional programs developed by the US Department of Education. This field requires 6 digits as shown below.

FIU has a list of the CIP Codes it uses, classified pursuant to departments. A link to the CIP Codes List can be found on the Controller’s website, in the “Forms” tab, under Financial Services. See example 7b. You can enter the first two digits and select from the drop down menu.

*Note: If your activity is not on the FIU list, use 00.0000 as your CIP.*
8. **Purpose:**

Describe the purpose of requesting a new activity number in the comment box provided. This comment box is also used to specify the exact requested Activity Nbr, or to explain the modifications needed.

- Approvers need specific information to process new activity number requests
- The Request must include a detailed description of:
  - All revenue streams, if applicable
  - What the money will be used for, for example: faculty to instruct, faculty development, research activities, academic advising, etc...
- Office of the Controller requirements for opening new activity numbers are the following:
  - Must have actual or forecasted revenue and/or expense activity of the least $10,000 per year
  - Must be for a continuing activity, not a one-time event.
- If a requestor does not meet these 2 criteria then the only way to get the activity number opened is through approval of an exception by the Controller. You can email Jose Zubimendi jzubimen@fiu.edu or Alexandra Mirabal aimiraba@fiu.edu with your exception request, include a detailed explanation of why the new activity number is needed and the Revenues and Expenses that will be associated with this new activity number.

9. **Guarantee Activity Nbr:**

If using “Auxiliary Enterprises” or “Agency Fund” as the funding group, select a “Guarantee Activity Nbr” from the dropdown menu.
10. **History:**
After submitting the e-form, you can re-open the “View Only” link to see any changes made to the request.

11. **Certification:**
Before submitting the form, it is necessary to certify that the information entered is correct.

12. **Submit the form:**
Once the form has been completed, select the submit button at the very bottom of the form.

*Note: Once the form has been submitted it cannot be modified by the requestor. (It may be updated by the expense manager or Academic Affairs Reviewer.)*

C. **After Filling and Submitting the e-Form**

- An email confirming submission will be sent to the requestor; it will include a link. Follow the link to view the e-Form. Refer back to this link to check the e-Form status.
- The e-Form will be forwarded automatically to various reviewers and approvers, who can accept or deny the request, or make modifications before approving.
- When the request has been fully approved, the requestor will receive an e-mail with the new activity number.
D. To Fill the Form for a Change or Deactivation of an Activity Number

Follow the steps of new activity nbr request with two exceptions:

13. **Title:**
Write the type of change or deactivation requested.

14. **Purpose:**
Explain the change or deactivation that you are requesting. Include the Move-to Activity number.

15. **For Deactivations:**
A replacement activity number is required and will be used by Accounting and Reporting to reclassify account balances and error correction if necessary in the future. Please ensure that the replacement activity number is within the same fund or at a minimum does not cross fund types, i.e. restricted fund does not move to an unrestricted fund.
E. To Fill the Form for a New Department

New Department Request:

Fill out the information for the department in the top section of the form. Contact HR Compensation Administration regarding filling out the new department section.

You will also have to fill out the New Activity Number Request section at the same time. Follow the steps for requesting a new activity number as described in this manual. (Some of the fields will auto-populate.)
F. To Fill the Form for a Department Change

16. Department Changes Request:

Choose to make a department change. This is a change to the HR department, not to the Activity Number. Contact HR Compensation Administration regarding filling out the form.
For Updating Expense Managers fill out the following:

**17. Effective date:**
Enter the effective date

**18. Department:**
Enter the ID of the department that you would like to make changes to (9 digits)

**19. Field to be changed:**
Only enter the information into the field that you need to change

**20. Certification:**
Before submitting the form, it is necessary to certify that the information entered is correct.
### 21. Submit:

Submit the Form. You will receive a confirmation e-mail. If you do not receive a confirmation e-mail, please contact FSSS.

### G. After Filling and Submitting the e-Form

- An email confirming submission will be sent to the requestor; it will include a link. Follow the link to view the e-Form. Refer back to this link to check the e-Form status.
- The e-Form will be forwarded automatically to various reviewers and approvers, who can accept or deny the request, or make modifications before approving.
- When the request has been fully approved, the requestor will receive an e-mail stating that the changes have been approved.