Directions for Completing the Funding Segment Value Request Form

When a new Funding value is required, the Requestor must:

- Fill out the Funding Segment Value Request Form (below) with all of the information needed by the Controller's Office.
- Have the request and form approved by your Division or School Fiscal Officer.
- Forward the form and any accompanying information to the Controller’s Office.

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**Dartmouth College**

**Funding Segment Request Form**

***All Fields are Required***

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**Requestor Name:**

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**Division/Department:**

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**Phone:**

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**E-Mail:**

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**Check the appropriate action and indicate the desired effective date:**

- [ ] Create New
- [ ] Modify Existing
- [ ] Disable Existing
- [ ] Re-Enable Existing
- [ ] Change Responsible Person
- [ ] Change Faculty Member

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**Provide the description and the value, if known, for each parent in the hierarchy that relates to the value you are requesting:**

<table>
<thead>
<tr>
<th>Level 1 Parent</th>
<th>Description (not to exceed 35 characters)</th>
<th>Value (if known)</th>
<th>Assigned Value</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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</tbody>
</table>

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**The Level 5 Child Value should only be filled in if you are requesting to Modify, Disable, or Re-enable that value. When requesting that a new value be created, the Controller's Office will assign a value based on availability.**

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**Describe the specific business purpose for this new segment value or the reason for requesting the change including the estimated dollars that will be captured using this value.**

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**Is this an NCAA related Funding Value?**

- [ ] Yes
- [ ] No

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**Is this Funding Value used by a specific faculty?**

- [ ] Yes
- [ ] No

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**Who is responsible for the monitoring and spending on this Funding Value?**

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**If changing the responsible person for monitoring and spending, who was the former responsible person for this Funding Value?**

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**Is this a Mass Change?**

- [ ] Yes
- [ ] No

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**Division/School Fiscal Officer Approval:**

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**Controller’s Office Approval:**

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Please refer to the following table for definitions of items on the Request Form.
<table>
<thead>
<tr>
<th>Form #</th>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Requestor Name</td>
<td>Name of the individual who is requesting the new value</td>
</tr>
<tr>
<td>2</td>
<td>Position Title</td>
<td>Position Title of the Requestor</td>
</tr>
<tr>
<td>3</td>
<td>Request Date</td>
<td>Date of the request for the new Funding value (MMDDYY). Please allow 5 business days for processing and set up in the Oracle GL.</td>
</tr>
<tr>
<td>4</td>
<td>Division/Department</td>
<td>Division or department in which the Requestor works</td>
</tr>
<tr>
<td>5</td>
<td>Phone</td>
<td>Phone number of the Requestor</td>
</tr>
<tr>
<td>6</td>
<td>E-Mail</td>
<td>E-Mail address of the Requestor</td>
</tr>
<tr>
<td>7</td>
<td>Create New</td>
<td>Check if you would like a new Funding value created. Indicate the desired date (MMDDYY) for this value to be effective.</td>
</tr>
<tr>
<td>8</td>
<td>Modify Existing</td>
<td>Check if you would like an existing Funding modified (e.g. move child values to a different parent or modifying Org descriptions). Indicate the desired effective date (MMDDYY) for this value to be modified.</td>
</tr>
<tr>
<td>9</td>
<td>Disable Existing</td>
<td>Check if you would like an existing Funding value to be disabled (frozen). Indicate the desired effective date (MMDDYY) for this value to be disabled.</td>
</tr>
<tr>
<td>10</td>
<td>Re-Enable Existing</td>
<td>Check if you would like an existing Funding that had been previously disabled, to be Re-Enabled. Indicate the desired effective date (MMDDYY) for this value to be re-enabled.</td>
</tr>
<tr>
<td>11</td>
<td>Change Responsible Person</td>
<td>Check if you would like to change the existing responsible person on the Funding to another individual. Indicate the desired effective date (MMDDYY) for this change to take place.</td>
</tr>
<tr>
<td>12</td>
<td>Change Faculty Member</td>
<td>Check if you would like to change the Faculty Member associated with this Funding value. Indicate the desired effective date (MMDDYY) for this change to take place.</td>
</tr>
<tr>
<td>13</td>
<td>Hierarchy Level Requested</td>
<td>Check which Level is to be created, modified, disabled, or re-enabled.</td>
</tr>
<tr>
<td>14</td>
<td>Parent Description</td>
<td>For each level being requested, the Parent description in the hierarchy MUST be provided.</td>
</tr>
<tr>
<td>15</td>
<td>Parent Value</td>
<td>For each level being requested, provide the Parent values (if known) in the hierarchy.</td>
</tr>
<tr>
<td>16</td>
<td>Assigned Value</td>
<td>For Controller’s Office Use only. Here is where you will see the new Funding Value assigned.</td>
</tr>
<tr>
<td>17</td>
<td>Child Requested Description</td>
<td>Description that the end-user will see in reports. Provide the description you would like the value to have. Funding value descriptions must not exceed 35 characters.</td>
</tr>
<tr>
<td>18</td>
<td>Business Purpose</td>
<td>The specific business purpose for the new segment value, or the reason for the change request.</td>
</tr>
<tr>
<td>19</td>
<td>NCAA</td>
<td>Check Yes if this Value is associated with NCAA Reporting.</td>
</tr>
<tr>
<td>20</td>
<td>Faculty Member Use</td>
<td>Check Yes if this Funding value is used by a specific faculty member.</td>
</tr>
<tr>
<td>21</td>
<td>Responsible Faculty Member</td>
<td>Name of the faculty member who is associated with this value.</td>
</tr>
<tr>
<td>22</td>
<td>Changing Faculty Member</td>
<td>If changing the faculty member, name of the former faculty member here.</td>
</tr>
<tr>
<td>23</td>
<td>Responsible Person</td>
<td>Name of the person responsible for monitoring and spending on this value.</td>
</tr>
<tr>
<td>24</td>
<td>Former Responsible Person</td>
<td>Name of the person formerly responsible for monitoring and spending on this value.</td>
</tr>
<tr>
<td>25</td>
<td>Mass Change</td>
<td>If the former responsible person was associated with more than one Funding value and you are requesting that the responsible person be changed on all of those values, please indicate whether this is a Mass Change or not.</td>
</tr>
</tbody>
</table>
Key Items to Keep in Mind:

- All fields are required. Requests will be sent back if all fields are not filled in properly.
- New Funding value requests must be approved by your Division or School Fiscal Office and the Controller’s Office.
- The Request Form must come in e-mail format to the Controller’s Office at GL Chart@dartmouth.edu.
- Parent and Child Descriptions and Values MUST be provided for each level that is being requested.
- If you are creating a new child Funding value, please be sure to coordinate that Funding with the Funding in HRMS.

Next Steps

Send the Request Form via E-mail to your Fiscal Officer. The Fiscal Officer will approve or deny the Request.

<table>
<thead>
<tr>
<th>If . . .</th>
<th>Then . . .</th>
</tr>
</thead>
<tbody>
<tr>
<td>The request is approved</td>
<td>The Fiscal Officer will send the approved request form via e-mail to the EVP Office.</td>
</tr>
<tr>
<td>The request is denied</td>
<td>The Fiscal Officer will send the denied request form via e-mail back to the Requestor with the reasons why it was not approved.</td>
</tr>
</tbody>
</table>

The Controller’s Office will approve or deny the request from the Fiscal Officer.

<table>
<thead>
<tr>
<th>If . . .</th>
<th>Then . . .</th>
</tr>
</thead>
<tbody>
<tr>
<td>The request is approved</td>
<td>The Controller’s Office will make the changes in the GL and send an e-mail with the new assigned value to the Fiscal Officer and the Requestor.</td>
</tr>
<tr>
<td>The request is denied</td>
<td>The Controller’s Office will send the denied request form via e-mail back to the Fiscal Officer and the Requestor with the reasons why it was not approved.</td>
</tr>
</tbody>
</table>