


Directions for Completing the Activity Segment Value Request Form

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

- Fill out the Activity 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.

 Dartmouth College Activity Segment Request Form *** All Fields Are Required ***																											
Requestor Name: 1		Position Title: 2	Request Date: MMDDYY 3																								
Division/Department: 4	Phone: 5	E-Mail: 6																									
Check The Appropriate Action and Indicate the Desired Effective Date: <input type="checkbox"/> Create New 7 MMDDYY <input type="checkbox"/> Disable Existing 9 MMDDYY <input type="checkbox"/> Change Attribute 11 MMDDYY <input type="checkbox"/> Modify Existing 8 MMDDYY <input type="checkbox"/> Re-Enable Existing 10 MMDDYY																											
12 Indicate which level you are requesting to create, modify, disable, or re-enable: <input type="checkbox"/> Level 1 Parent <input type="checkbox"/> Level 2 Parent <input type="checkbox"/> Level 3 Parent <input type="checkbox"/> Level 4 Parent <input type="checkbox"/> Level 5 Child																											
Provide the description and the value, if known, for each parent in the hierarchy that relates to the value you are requesting: <table border="1" style="width: 100%; border-collapse: collapse; margin-top: 5px;"> <thead> <tr> <th style="width: 15%;"></th> <th style="width: 40%;">Description (not to exceed 35 characters)</th> <th style="width: 20%;">Value (if known)</th> <th style="width: 25%;">Assigned Value</th> </tr> </thead> <tbody> <tr> <td>Level 1 PARENT</td> <td style="text-align: center;">13</td> <td style="text-align: center;">14</td> <td style="text-align: center;">15</td> </tr> <tr> <td>Level 2 PARENT</td> <td></td> <td></td> <td></td> </tr> <tr> <td>Level 3 PARENT</td> <td></td> <td></td> <td></td> </tr> <tr> <td>Level 4 PARENT</td> <td></td> <td></td> <td></td> </tr> <tr> <td>Level 5 Child</td> <td style="text-align: center;">16</td> <td></td> <td></td> </tr> </tbody> </table> <p style="color: red; font-size: small; margin-top: 5px;">The Level 5 Child Value Should Only Be Filled In if you are modifying, disabling, or re-enabling that value. For new value requests the Controller's Office will assign the value based on availability.</p>					Description (not to exceed 35 characters)	Value (if known)	Assigned Value	Level 1 PARENT	13	14	15	Level 2 PARENT				Level 3 PARENT				Level 4 PARENT				Level 5 Child	16		
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Level 1 PARENT	13	14	15																								
Level 2 PARENT																											
Level 3 PARENT																											
Level 4 PARENT																											
Level 5 Child	16																										
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: <div style="text-align: center; margin-top: 10px;">17</div>																											
Attributes:																											
18 Is this an NCAA related activity? <input type="checkbox"/> Yes <input type="checkbox"/> No	19 Is a Diversity related activity? <input type="checkbox"/> Yes <input type="checkbox"/> No	20 Does this activity generate Unrelated Business Income? <input type="checkbox"/> Yes <input type="checkbox"/> No																									
A-21:	AAMC:	IPED:	Overhead Calc:																								
OSP Use Only	DMS Use Only	Controller's Office Use Only	Controller's Office Use Only																								
Division/School Fiscal Officer Approval:			Date:																								
Controller's Office Approval:			Date:																								

Please refer to the following table for definitions of items on the Request Form.

Form #	Field	Description
1	Requestor Name	Name of the individual who is requesting the new value
2	Position Title	Position Title of the Requestor
3	Request Date	Date of the request for the new Activity value (MMDDYY). Please allow 5 business days for processing and set up in the Oracle GL.
4	Division/Department	Division or department in which the Requestor works
5	Phone	Phone number of the Requestor
6	E-Mail	E-Mail address of the Requestor
7	Create New	Check if you would like a new Activity value created. Indicate the desired date (MMDDYY) for this value to be effective.
8	Modify Existing	Check if you would like an existing Activity 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.
9	Disable Existing	Check if you would like an existing Activity value to be disabled (frozen). Indicate the desired effective date (MMDDYY) for this value to be disabled.
10	Re-Enable Existing	Check if you would like an existing Activity that had been previously disabled, to be Re-Enabled. Indicate the desired effective date (MMDDYY) for this value to be re-enabled.
11	Change Attribute	Check if you would like to change the attribute on an existing Activity value. Indicate the desired effective date (MMDDYY) for this change to take effect.
12	Hierarchy Level Requested	Check which Level is to be created, modified, disabled, or re-enabled.
13	Parent Description	For each level being requested, the Parent description in the hierarchy MUST be provided.
14	Parent Value	For each level being requested, provide the Parent values (if known) in the hierarchy.
15	Assigned Value	For Controller's Office Use only. Here is where you will see the new Activity Value assigned.
16	Child Requested Description	Description that the end-user will see in reports. Provide the description you would like the value to have. Activity value descriptions must not exceed 35 characters.
17	Business Purpose	The specific business purpose for the new segment value, or the reason for the change request.
18	NCAA	Check Yes if this Value is associated with NCAA Reporting.
19	Diversity	Check Yes if this value is a Diversity-related Activity.
20	Unrelated Business Income	Check yes if this Activity generates Unrelated Business Income, that is, sales of goods or services to non-College Departments. Contact the Dartmouth College tax professional at 646-0034.

Key Items to Keep in Mind:

- All fields are required. Requests will be sent back if all fields are not filled in properly.
- New Activity 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 GLChart@dartmouth.edu.
- Parent and Child Descriptions and Values MUST be provided for each level that is being requested.

Next Steps

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

If . . .	Then . . .
The request is approved	The Fiscal Officer will send the approved request form via e-mail to the Controller's Office.
The request is denied	The Fiscal Officer will send the denied request form via e-mail back to the Requestor with the reasons why it was not approved.

- The Controller's Office will approve or deny the request.

If . . .	Then . . .
The request is approved	The Controller's Office makes the changes in GL and sends an e-mail with the new assigned value to the Fiscal Officer and Requestor.
The request is denied	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.