


Directions for Completing the Natural Class Segment Request Form

When a new Natural Class value is required, the Requestor must:

- Fill out the Natural Class 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 Natural Class 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)	<input type="checkbox"/> Disable Existing (9)	<input type="checkbox"/> Change Attribute (11)	
<input type="checkbox"/> Modify Existing (8)	<input type="checkbox"/> Re-Enable Existing (10)		
(12) Indicate which level you are requesting to create, modify, disable, or re-enable:			
<input type="checkbox"/> Level 1 Parent	<input type="checkbox"/> Level 3 Parent	<input type="checkbox"/> Level 5 Parent	
<input type="checkbox"/> Level 2 Parent	<input type="checkbox"/> Level 4 Parent	<input type="checkbox"/> Level 6 Child	
Provide the description and the value, if known, for each parent in the hierarchy that relates to the value you are requesting:			
	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 PARENT			
Level 6 Child	(16)		
The Level 6 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.			
Describe The Reason For Requesting The Change or The Specific Business Purpose For This New Segment Value including the estimated Dollars That Will Be Captured Using This Value:			
(17)			
Attributes:			
Is the requested Natural Class an Internal Revenue or Internal Expense Natural Class? If yes, indicate Internal Revenue or Internal Expense below.			
<input type="checkbox"/> Internal Revenue <input type="checkbox"/> Internal Expense			
Division/School Fiscal Officer Approval:			Date:
Controller's Office Approval:			Date:

Please refer to the following table for definitions of terms 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 Natural Class 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 Natural Class value created. Indicate the desired date (MMDDYY) for this value to be effective.
8	Modify Existing	Check if you would like an existing Natural Class value 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 Natural Class 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 Natural Class value 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 the Natural Class segment. 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 Descriptions	For each level being requested, the Parent description in the hierarchy MUST be provided.
14	Parent Values	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 Natural Class 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. Natural Class 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	Internal Revenue/Expense	Check if this Natural Class value will be used to track internal revenues and/or internal expenses.

Key Items to Keep in Mind:

- All fields are required. Requests will be sent back if all fields are not filled in properly.
- New Natural Class 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.

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 within 5 business days of the request.
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.