



Department of
**Finance &
Administration**

Division of
Accounts

Chartfield Request Manual

for the

State of Tennessee

Date: 6/21/2019

Contents

Introduction.....	3
General Instructions for Requesting a New Chartfield	4
Approving Chartfield Requests.....	5
Denying a Chartfield Request	9
Requesting Inactivation / Reactivation of a Chartfield	10
Requesting a Chartfield Name (Description) Change.....	11
Canceling a Chartfield Request.....	12
Inquiring on a Chartfield.....	13
Appendix –.....	14
10 Digit Department ID	14
Program – Product	15
User Code – CF 1	16
Location – Class.....	17
Query – TN_GL_CFREQ	18
Supporting Documentation	19
Checklists	20

Introduction

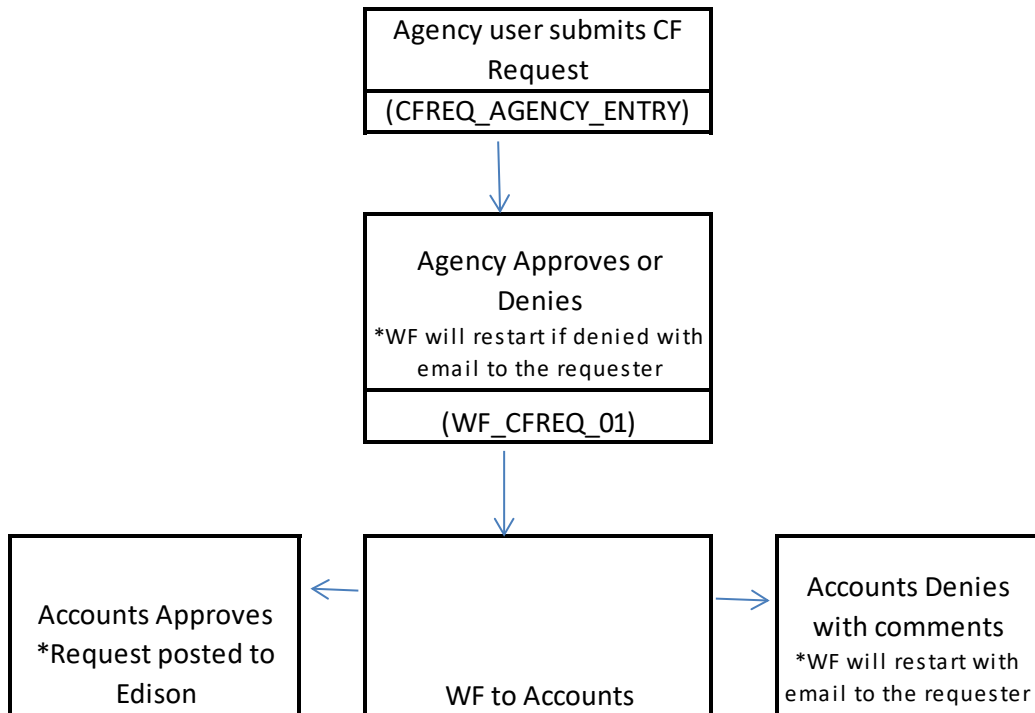
The FSCM 9.2 Upgrade to PeopleSoft introduced a new functionality named Chartfield (CF) Request. This functionality allows an end user to request a CF to be added to the configuration. The request is then routed through approvals before being automatically added to the CF configuration tables. Agencies will be able to enter certain requests directly into Edison with ability to attach documentation to the requested CF. This new functionality will assist the state in maintaining a clear and easy to follow audit trail for CF additions and changes.

Agency users assigned the Edison role of TN2_GL_CFREQ_AGENCY_CFREQ will submit all requests for additions or changes to the following CFs through the use of this new functionality:

- User Code (CF 1)
- Location CF
- Program – (Product)
- 10 digit department

From an agency user perspective, the process for requesting/modifying/inactivating an Account or Fund will not change. Likewise, there will be no change to the process an agency uses to request/change a five (5) digit department ID. Five (5) digit department id requests will, however, upon receipt by Division of Accounts, be processed by Division of Accounts utilizing the new functionality and, requesting agencies will be required to approve the request through the use of this functionality.

Once agency user submits a CF the request, workflow (WF) will route it to the appropriate agency approver. Agency approvers will need to be assigned the Edison role of TN2_WF_CFREQ_01.



General Instructions for Requesting a New Chartfield

Navigation – FSCM > Set Up Financials/Supply Chain > Common Definitions > Design Chartfields > Define Values > Chartfield Request > Add a New Value

1. On the ChartField Request page (page 1) – Click the tab “Add a new value”
2. Request ID: NEXT – this will pre-populate and will be grayed out
3. SETID – Enter Agency BU
4. Field Name – Click field to be added (select from drop down)
5. Field Action – Add will pre-populate
6. Field Value – Enter the new chartfield value to be added
7. Click Add

After clicking Add, the user is taken to page 2 of the CF request process where the core information for the CF request, request comments, save button and request for approval is located.

The following fields will default based on the information entered from page 1 of the CF request process –

1. SETID – should equal the BU of the user
2. Field Name – field chosen on page 1 of process
3. Field Value – value entered on page 1 of process
4. Telephone – optional
5. Email ID – the users State email address will default for user

The following fields are required to be entered by the user –

1. Core Information:
 - Effective Date = date CF will be active (Date will default with current date). The following are examples of items that need to be taken into consideration when setting the CF effective date:
 - Date of any outstanding journals, vouchers or other transactions not posted
 - Contract dates in the past which payments will be made against
 - Status = Active (will default as Active and should not be changed for a CF addition request)
 - Description = 30 characters max. This field should be populated with the desired name or description of the CF. This is the name or description that will, for example, be returned when entering journal lines and running certain queries.
 - Short description = 10 characters max. This field should be populated with an abbreviated version of the CF description. It, for example, is returned when making inquiries on the CF value pages

NOTE: When the page is saved, if more than 30 or 10 characters are entered, the user will receive a notification for the value being entered is oversized. The user will receive separate notifications for the DESCR and/or DESCRSHORT if the field value is oversized. Once the user clicks OK and corrects the length of the DESCR or DESCRSHORT, the user will be able to save.

2. Business Justification:
 - Business justification field = 254 characters max. The field should be populated with a brief, narrative description of the justification/need for the new CF. If more than 254 characters are needed, an attachment with all details can be added to the request.
 - Add attachments if necessary = see Appendix for detail
3. Comments = xxx characters max. This is an optional field the user can use to add other explanatory comments to the request as deemed necessary
4. Click Save
5. Request Action dropdown – Click submit for Approval and click **GO**

After the user clicks **GO**, the request will be routed to the agency approver. The agency approver will review and either approve or deny. The user will receive an email indicating if the request was approved or denied. If approved – the request will workflow to Division of Accounts for review and approval and/or denial. Deny instructions are covered later in this manual.


Approving Chartfield Requests

There are 3 methods for approving a CF request once it is submitted for approval.







(1) Email link

Each agency approver will receive an email similar to the one below:

Approval is Requested for Field Request ID "000000067"

 erp.uat@tn.gov

Sent: Tue 4/23/2019 12:07 PM

To:  angela.warden@tn.gov;  courtney.jolly@tn.gov;  jonathan.beretta@tn.gov;
 Michelle Earhart;  Mike Corricelli;  Mitzi Martin

Retention Policy: 90 Day Delete (90 days) Expires: 7/22/2019

A Field Request has been entered that requires your attention.

Request ID: 000000067

SetID: 34301

Field Name: CHARTFIELD1

Field Action: A

Field Value: 042019

Effective Date: 2019-04-23

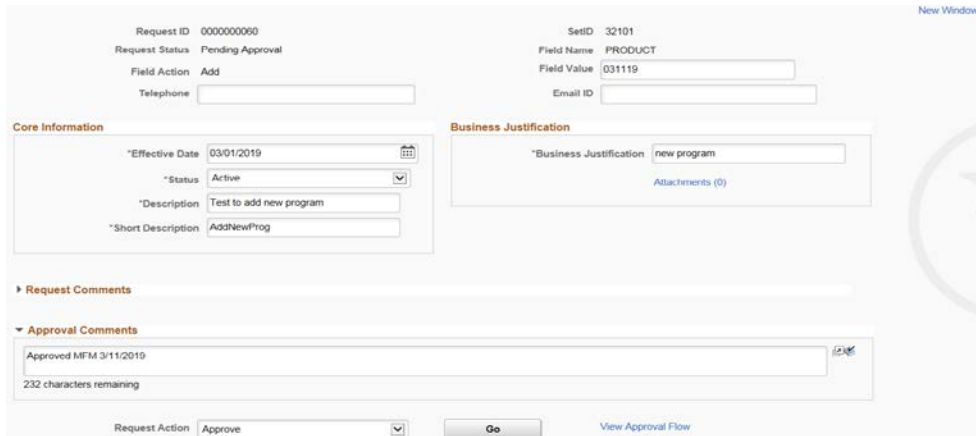
Description: Test email WF

Requester: ERICG0511002

You can navigate directly to the Field Request entry page by clicking the link below.

[https://sso-
uat.edison.tn.gov/psp/pauat/EMPLOYEE/ERP/c/MANAGE_FIELD_RE
QUEST.FLD_REQ_APPROVAL.GBL?
Page=FLD_REQ_APPROVAL&Action=U&FLD_REQUEST_ID=000000067](https://sso-
uat.edison.tn.gov/psp/pauat/EMPLOYEE/ERP/c/MANAGE_FIELD_REQUEST.FLD_REQ_APPROVAL.GBL?Page=FLD_REQ_APPROVAL&Action=U&FLD_REQUEST_ID=000000067)

1. Click on the Link in the email
2. Review the CF request for propriety (considering for example items such as (a) completion of request in accordance with these instructions, (b) sufficiency of justification and supporting documentation, etc.)
3. If CF request is deemed complete and proper, click on Request Action drop down and click Approve
4. Click **GO**



Request ID: 000000067
Request Status: Pending Approval
Field Action: Add
Telephone:

SetID: 32101
Field Name: PRODUCT
Field Value: 031119
Email ID:

Core Information

*Effective Date: 03/01/2019
*Status: Active
*Description: Test to add new program
*Short Description: AddNewProg

Business Justification

*Business Justification: new program
Attachments (0)

Request Comments

Approval Comments

Approved MFM 3/11/2019
232 characters remaining

Request Action: Approve
Go
View Approval Flow

(2) Worklist

FSCM > Worklist > Worklist

1. Click on the Link in the Worklist items

Worklist

Worklist for ADELH0819002: Adel Hana

[Detail View](#)

AP Voucher_Search

Business Unit

Voucher ID

From Voucher ID

To Voucher ID

Worklist Filters

Worklist Items

From	Date From	Work Item	Worked By Activity	Priority	Link
Victor Nwanso	02/15/2019	Approval Routing	Approval Workflow	2-Medium	FieldRequestApproval:49 SHARE:1901.01.03.N.O.FLD.REQUEST.ID:0000000050 RDC:RA.0.A.
Victor Nwanso	03/11/2019	Approval Routing	Approval Workflow	2-Medium	FieldRequestApproval:57 SHARE:1901.01.03.N.O.FLD.REQUEST.ID:0000000060 RDC:RA.0.A.

2. Review the CF request for propriety (considering for example items such as (a) completion of request in accordance with these instructions, (b) sufficiency of justification and supporting documentation, etc.)
3. If CF request is deemed complete and proper, click on Request Action drop down and click Approve
4. Click **GO**

Request ID: 000000000 SetID: 32101

Request Status: Pending Approval Field Name: PRODUCT

Field Action: Add Field Value: 031119

Telephone: Email ID:

Core Information

*Effective Date: 03/01/2019

*Status: Active

*Description: Test to add new program

*Short Description: AddNewProg

Business Justification

*Business Justification: new program

Attachments (0)

Request Comments

Approval Comments

Approved MFM 3/11/2019

232 characters remaining

Request Action: Approve [View Approval Flow](#)

(3) User Monitor

FSCM > Worklist > User Monitor

1. Approval Process – Click on Field Request Approval in dropdown
2. Approver will pre-populate
3. Approver Status – Choose Pending
4. Click Search

Monitor Approvals

▼ Search Criteria

Approval Process	FieldRequestApproval	Definition ID	
Header Status		Last Modified	
Current Role	Approver		
Approver Status	Pending		
Originator			
Requester			

5. To narrow the search results use one or more of the following filters:
 - Request ID
 - SETID
 - Field Name – all CAPS with alternate name (PeopleSoft CF name)
 - CHARTFIELD1 = User Code
 - PRODUCT = Program
 - CLASS_FLD = Location
 - DEPTID = Department ID
 - Field Value
 - Requester
 - Field Action
6. Click Filter
7. Click Link for request to review

▼ Approval Process: Field Request Approval Process

Request ID		SetID	34301
Field Name 1	CHARTFIELD1	Field Value	
Requester		Field Action	

	Modified	Status	Request ID	SetID	Field Name 1	Field Value	Requester	Field Action
1	2019-04-23	Pending	0000000067	34301	CHARTFIELD1	042019	ERICG0511002	A
2	2019-04-30	Pending	0000000075	34301	CHARTFIELD1	0429219	ERICG0511002	A
3	2019-04-30	Pending	0000000088	34301	CHARTFIELD1	010404	MARYK0825003	U
4	2019-04-30	Pending	0000000087	34301	CHARTFIELD1	010400	MARYK0825003	U

8. Review the CF request for propriety (considering for example items such as (a) completion of request in accordance with these instructions, (b) sufficiency of justification and supporting documentation, etc.)
9. If CF request is deemed complete and proper, click on Request Action drop down and click Approve
10. Click **GO**

New Window

Request ID: 000000060	SetID: 32101
Request Status: Pending Approval	Field Name: PRODUCT
Field Action: Add	Field Value: 031119
Telephone: <input type="text"/>	Email ID: <input type="text"/>

Core Information

*Effective Date:

*Status:

*Description:

*Short Description:

Business Justification

*Business Justification:

[Attachments \(0\)](#)

Request Comments

Approval Comments

Approved MFM 3/11/2019

232 characters remaining

Request Action:

Go [View Approval Flow](#)

Denying a Chartfield Request

The 3 methods for approving a CF request can also be used for denying a request if upon review it is not deemed complete and proper.

1. To Deny, the agency approver must click on the Approver comments and add the reason why the request is being denied.
2. Click click on Request Action drop down and click Deny.
3. Click **GO**

Approval Comments

Comments are required when Approver Denies a CF REQ

203 characters remaining

Request Action: Deny [View Approval Flow](#)

Requester	ERICG0511002	Eric Bucholz		
Entered By	ERICG0511002	Eric Bucholz	Entered Date/Time	04/29/2019 1:46PM
Updated By	ERICG0511002	Eric Bucholz	Updated Date/Time	04/29/2019 1:50PM

4. After the request is denied, an email will be sent to the user who submitted the request. An example of an email with the link is included below.

Field Request ID "0000000065" Has Been Denied

erp.uat@tn.gov

Sent: Tue 4/23/2019 11:25 AM

To: Mitzi Martin

Retention Policy: 90 Day Delete (90 days) Expires: 7/22/2019

The following Field Request has been Denied.

Request ID: 0000000065
SetID: 34301
Field Name: CHARTFIELD1
Field Action: A
Field Value: 042319
Effective Date: 2019-04-01
Description: Test Agency Approver Deny
Requester: mitz1015001

You can navigate directly to the Field Request entry page for more information by clicking the link below.

[https://sso-
uat.edison.tn.gov/psp/pauat/EMPLOYEE/ERP/c/MANAGE_FIELD_RE
QUEST.FLD_REQ_APPROVAL.GBL?
Page=FLD_REQ_APPROVAL&Action=U&FLD_REQUEST_ID=000000006
5](https://sso-
uat.edison.tn.gov/psp/pauat/EMPLOYEE/ERP/c/MANAGE_FIELD_RE
QUEST.FLD_REQ_APPROVAL.GBL?
Page=FLD_REQ_APPROVAL&Action=U&FLD_REQUEST_ID=000000006
5)

The user will either fix the issue from the approver's denial comments or they can cancel the request if needed. Cancelling a request is explained later in this manual. Once the user has resubmitted – the request flow will change back to pending and workflow will restart.

Requesting Inactivation / Reactivation of a Chartfield

Navigation – FSCM > Set Up Financials/Supply Chain > Common Definitions > Design Chartfields > Define Values > Chartfield Request > Add a new value

CF Request Page:

1. On the ChartField Request page (page 1) – Click the tab “Add a new value”
2. Request ID: NEXT – this will pre-populate and will be grayed out
3. SETID – Enter Agency BU
4. Field Name – Click field to be inactivated or reactivated (select from drop down)
5. Field Action – Click Update (select from drop down)
6. Field Value – Enter the existing chartfield to be inactivated or reactivated
7. Click Add and user is taken to the Core Information page

Core Information:

- Effective Date = date CF will be made inactive or active (Date will default with current date). The following are examples of items that need to be taken into consideration when setting the CF effective date:
 - Date of any outstanding journals, vouchers or other transactions not posted
 - Contract dates in the past which payments will be made against
- Contract dates in the past which payments will be made against
- Status = Change to appropriate status from dropdown (i.e. active or inactive)

Business Justification:

- Business justification field = 254 characters max. The field should be populated with a brief, narrative description of the justification/need for the inactivation or reactivation. If more than 254 characters are needed, an attachment with all details can be added to the request.
 - Add attachments if necessary – see Appendix for detail
8. Click Save
 9. Request Action dropdown – Click submit for Approval and click GO

NOTE – When a specific CF is to be inactivated, run query TN_GL_CFREQ_BALANCE. If the query returns no results – the account is acceptable to be inactivated. If the query returns results, record the appropriate journal and rerun the query. Attach the query showing no results to the inactivation request.

Below is an example of a query with results for which a Journal will need to be completed.

Unit = 31799,Fund=11000,Year=2019,Beg Acctg Period=0,End Acctg Period=998,DeptID=%,PROGRAM=%,USER CODE=%,LOCATION=%,ACCOUNT=33010750

View All | Rerun Query | Download to Excel | Download to XML First 1-2 of 2 Last

	Unit	Ledger	Fund	Dept	Account	Descr	Program	User Code	Location CF	Year	Sum Total Amt
1	31799	ACTUALS	11000		33010750	Overpayment-DOA To Be Refund				2019	-188.050
2	31799	ACTUALS	11000	3179900000	33010750	Overpayment-DOA To Be Refund				2019	188.050

Requesting a Chartfield Name (Description) Change

Navigation – FSCM > Set Up Financials/Supply Chain > Common Definitions > Design Chartfields > Define Values > Chartfield Request > Add a new value

Only existing CF's can be updated for name changes.

1. On the ChartField Request page (page 1) – Click the tab “Add a new value”
2. Request ID: NEXT – this will pre-populate and will be grayed out
3. SETID – Enter Agency BU
4. Field Name – Click field to be updated (select from drop down)
5. Field Action – Click update (select from drop down)
6. Field Value – Enter the existing chartfield value to be updated
7. Click Add and user is taken to the Core Information page

Core Information:

- Effective Date = update with new date CF will be active (Date will default with current date)
- Status = leave status as Active
- Description = 30 Characters max – add new long description
- Short description = 10 Characters max – add new short description

Business Justification:

- Business justification field = 254 characters max. The field should be populated with a brief, narrative description of the justification/need for the name (description) change. If more than 254 characters are needed, an attachment with all details can be added to the request.
- Add attachments if necessary – see Appendix for detail

8. Click Save
9. Request Action dropdown – Click submit for Approval and click GO

NOTE – When requesting a name change for a Department ID, the Department ID cannot have current or past activity. The activity will follow the name change and the history of the original name will be lost.

Canceling a Chartfield Request

Navigation – FSCM > Set Up Financials/Supply Chain > Common Definitions > Design Chartfields > Define Values > Chartfield Request > Find an existing value

A request can only be cancelled before it is submitted or after the denied by the approver. Once the request is submitted, the dropdown to cancel is grayed out.

1. To Cancel, the user must click on the Request comments and add the reason why the request is being canceled
2. On the ChartField Request page – Click the tab “Find an Existing Value”
3. Click Clear
4. Request ID – Enter 10 digit Request ID
5. SETID – Enter Agency BU
6. Click Search and the user is taken to the page to cancel the request
7. Request Action dropdown – Click Cancel and click GO

▼ Request Comments

To cancel a request, the user must enter the reason for the cancellation.

Request Action

Requester

Entered By	mitz1015001	Mitzi Martin	Entered Date/Time	05/14/2019 10:10AM
Updated By	mitz1015001	Mitzi Martin	Updated Date/Time	05/14/2019 10:10AM

Inquiring on a Chartfield

Navigation – FSCM > Set Up Financials/Supply Chain > Common Definitions > Design Chartfields > Define Values > Chartfield Request

1. On the Chartfield Request page – Click the tab “Find an Existing Value”
2. Click Clear
3. Request ID: enter 10 digit request ID
4. SETID – Enter Agency BU
5. Field Name – Click field to be added (select from drop down)
6. Click Search and user is taken to the CF REQ page to view the information
7. Click Attachments Link to go to the attachments associated with the CF REQ
8. Click File link to view attachments

ChartField Request

Request ID: 000000010 SetID: 33901
 Request Status: Approved Field Name: DEPTID
 Field Action: Add Telephone: Email ID: Mitzi.Martin@tn.gov

Core Information

Budgetary Only

*Effective Date: 07/01/2018
 *Status: Active
 *Description: Rural Tele-Health Exp Program
 *Short Description: RurTelHlt

Business Justification

Budget Apprvd Ltr Attached

Contains Payroll: YES
 *Business Justification: New Grant with payroll
 Other Authority:
 TCA:

[Attachments \(1\)](#)

Request Comments

Request Action: Go [View Approval Flow](#)

Requester: mitz1015001 Mitzi Martin
 Entered By: mitz1015001 Mitzi Martin Entered Date/Time: 05/16/2019 10:31AM
 Updated By: michd0806001 Michelle Hernandez Updated Date/Time: 05/16/2019 1:25PM

Attachments to a request can be viewed by clicking on the [Attachments](#) link and then the File link.

To view approval status click on the [View Approval Flow](#) link:

Approval Flow

Program - Product

Request ID 0000000060: Pending

Program - Product

Approved: Adel Hana (Field Request Approver List) 03/11/19 - 1:46 PM

Pending: Multiple Approvers (Field Request Approver List 2)

Comments:

Adel Hana at 03/11/19 - 1:46 PM
Approved MFM 3/11/2019

Victor Nwanso at 03/11/19 - 1:36 PM
Approver(s): Please make sure the Field Value is not blank and all the info is correct!

[Return](#)

Approval Flow

Program - Product

Request ID 0000000078: Denied

Program - Product - Agency

Denied: Mary Ulmer (Field Request Approver List) 04/29/19 - 2:22 PM

Program - Product - DoA

Terminated: Multiple Approvers (Field Request Approver List 2) 04/29/19 - 2:22 PM

Comments

Appendix –

1. 10 Digit Department ID

- Additions must be 10 digits
- Additions must contain payroll (select YES in “Contains Payroll” dropdown under business justification)
Additions/Updates = Effective date is 7/1/2018 for FY2019 (First day of current FY) and inactivation can be current date
- Attach the appropriate checklist for one of the following:
 1. Creating or Inactivating a new department with or without payroll (Exhibit I or II)
 2. Creating or Inactivating a new department without payroll (Exhibit III or IV)
 3. Changing a Department ID with or without payroll (Exhibit V)

ChartField Request

Find an Existing Value **Add a New Value**

Request ID

SetID

Field Name

Field Action

Field Value

Add

[Home](#) ChartField Request

Request ID 000000008 SetID 30601
Request Status Pending Approval Field Name DEPTID
Field Action Add Field Value 3060103500
Telephone Email ID Mtzi.Martin@tn.gov

Core Information

Budgetary Only
*Effective Date 07/01/2018
*Status Active
*Description Appellate Division
*Short Description Appellate

Business Justification

FA Budget Apprvd Ltr Attached
Contains Payroll YES
*Business Justification New legislation for an Appellate Division -
Other Authority HB 642 _ SB 578
TCA 8-14-1
Attachments (2)

Request Comments

Request Action **Go** [View Approval Flow](#)

Requester	mtz1015001	Mtzi Martin	Entered Date/Time	05/16/2019 9:55AM
Entered By	mtz1015001	Mtzi Martin	Updated Date/Time	05/16/2019 9:55AM
Updated By	mtz1015001	Mtzi Martin		

➤ Business Justification Fields

- FA Budget Apprvd Ltr Attached – used with new 5 digit department ID’s entered by Accounts
- Contains Payroll – Agency is verifying the new department has payroll per the above requirement
- Business Justification – brief narrative description of the justification/need for the new department
- Other Authority and TCA – enter information related to request

2. Program – Product

- Must be 6 digits and can be alphanumeric

ChartField Request

Request ID

SetID

Field Name

Field Action

Field Value

ChartField Request

Request ID 000000100 SetID 31701 Copy

Request Status Newly Created Field Name PRODUCT

Field Action Add Field Value 511015

Telephone Email ID mitzi.martin@tn.gov

Core Information

*Effective Date 05/07/2019

*Status Active

*Description Talent Management

*Short Description TalentMgt

Business Justification

*Business Justification New Program for F&A

Attachments (1)

Request Comments

Request Action Go

Requester

Entered By mitz1015001 Mitzi Martin Entered Date/Time 05/14/2019 11:11AM

Updated By mitz1015001 Mitzi Martin Updated Date/Time 05/14/2019 11:11AM

3. User Code – CF 1

- Must be 6 digits and can be alphanumeric

ChartField Request

Request ID

SetID

Field Name

Field Action

Field Value

ChartField Request New Window | Personalize Page |

Request ID 000000101 SetID 31701

Request Status Newly Created Field Name CHARTFIELD1

Field Action Add Field Value 019OPS

Telephone Email ID mitzi.martin@tn.gov

Core Information

Budgetary Only

*Effective Date 07/01/2019

*Status Active

*Description 2019 Operations Symposium

*Short Description 19 Ops Sym

[Long Description](#)

[Attributes](#)

Business Justification

*Business Justification 2019 Operations Symposium hosted by T

[Attachments \(1\)](#)

Request Comments

Request Action

Requester

Entered By	mitz1015001	Mitzi Martin	Entered Date/Time	05/14/2019 11:18AM
Updated By	mitz1015001	Mitzi Martin	Updated Date/Time	05/14/2019 11:18AM

4. Location – Class

From the CF REQ page Click the County drop down and choose the County for the new value.

- The location must be 5 digits with the 1st two digits being the county number (i.e. 19 = Davidson = 19000)

ChartField Request

Request ID

SetID

Field Name

Field Action

Field Value

[Home](#) **ChartField Request** [New Window](#) | [Personalize Page](#)

Request ID 000000102 SetID 32101

Request Status Newly Created Field Name CLASS_FLD

Field Action Add Field Value 77002

Telephone Email ID mitzi.martin@tn.gov

Core Information

*Effective Date 04/01/2019

*Status Active

*Description 6407 State Route 28

*Short Description 6407State

Business Justification

County 77-Sequatchie

*Business Justification New State building

[Attachments \(1\)](#)

Request Comments

Request Action

Requester

Entered By mitz1015001 Mitzi Martin Entered Date/Time 05/14/2019 11:29AM

Updated By mitz1015001 Mitzi Martin Updated Date/Time 05/14/2019 11:29AM

5. Query – TN_GL_CFREQ

The query TN_GL_CFREQ can be used to view the status of Chartfield requests.

The following prompts are used in the query:

- (1) SETID – Enter the agency BU
- (2) Field Name – User can choose from a specific Field or use % to return all fields
- (3) Status – User can choose a specific status or select the blank status to see all

SetID = 34301,Field Name=%

View All | Rerun Query | Download to Excel | Download to XML

First 1-18 of 18 Last

Request ID	ChartField	Action	SetID	Value	Descr	Entered By	Entered Dttm	Requester	Request Status	Apprv Status	Last Apprv Update DTTM	Updated By	Updated Dttm
1	0000000052	CHARTFIELD1	U	34301 010400	Information Technology	ERICG0511002	02/20/2019 1:28:15PM	ERICG0511002	A	A	02/20/2019 1:39:04PM	mitz1015001	02/20/2019 1:39:04PM
2	0000000084	DEPTID	A	34301 3431055555	Health County Clinics	mitz1015001	04/30/2019 9:45:25AM	mitz1015001	A	A	05/15/2019 11:10:57AM	angeb0705001	05/15/2019 11:10:57AM
3	0000000085	CHARTFIELD1	A	34301 103019	Health Clinics	mitz1015001	04/30/2019 10:06:18AM	mitz1015001	P	P	04/30/2019 10:17:50AM	MARYK0825003	04/30/2019 10:17:50AM
4	0000000086	CHARTFIELD1	U	34301 010404	IT-PH Emrg Prpd-STARLIMS 08-58	MARYK0825003	04/30/2019 11:18:21AM	MARYK0825003	P	P	04/30/2019 11:18:31AM	MARYK0825003	04/30/2019 11:18:30AM
5	0000000087	CHARTFIELD1	U	34301 010400	Information Technology_2	MARYK0825003	04/30/2019 11:35:59AM	MARYK0825003	P	P	05/13/2019 3:11:47PM	mitz1015001	05/13/2019 3:11:47PM
6	0000000065	CHARTFIELD1	A	34301 042319	Test Agency Approver Deny	mitz1015001	04/23/2019 11:21:15AM	mitz1015001	D	D	04/30/2019 6:08:23PM	mikej1104001	04/30/2019 6:08:23PM
7	0000000065	CHARTFIELD1	A	34301 042319	Test Agency Approver Deny	mitz1015001	04/23/2019 11:21:15AM	mitz1015001	D	D	04/23/2019 11:25:11AM	mikej1104001	04/30/2019 6:08:23PM
8	0000000062	DEPTID	A	34301 3430102019	test workflow from MFM	mitz1015001	04/08/2019 2:08:44PM	mitz1015001	A	A	04/11/2019 11:54:10AM	michd0606001	04/11/2019 11:54:09AM
9	0000000066	CHARTFIELD1	A	34301 042119	Test Email Notification	mitz1015001	04/23/2019 11:56:41AM	mitz1015001	P	P	04/23/2019 12:01:11PM	MARYK0825003	04/23/2019 12:01:11PM
10	0000000075	CHARTFIELD1	A	34301 0429219	cancel request	ERICG0511002	04/29/2019 10:32:40AM	ERICG0511002	P	P	04/30/2019 10:28:54AM	MARYK0825003	04/30/2019 10:28:54AM
11	0000000067	CHARTFIELD1	A	34301 042019	Test email WF	ERICG0511002	04/23/2019 12:06:48PM	ERICG0511002	P	P	04/23/2019 12:06:57PM	ERICG0511002	04/23/2019 12:06:56PM
12	0000000089	PRODUCT	A	34301 051819	View approval Status	mitz1015001	05/08/2019 10:43:49AM	mitz1015001	P	P	05/08/2019 10:43:56AM	mitz1015001	05/08/2019 10:43:55AM
13	0000000044	PRODUCT	U	34301 200119	Test program Update	ERICG0511002	02/14/2019 9:20:25AM	ERICG0511002	P	P	02/14/2019 9:23:02AM	ERICG0511002	02/14/2019 9:23:02AM
14	0000000046	PRODUCT	U	34301 200011	Physical Therapy_Update	ERICG0511002	02/14/2019 10:06:15AM	ERICG0511002	A	A	02/14/2019 2:23:29PM	mitz1015001	02/14/2019 2:23:29PM
15	0000000045	CHARTFIELD1	U	34301 010150	Test UC Update	ERICG0511002	02/14/2019 1:46:33PM	ERICG0511002	A	A	02/15/2019 3:23:38PM	mitz1015001	02/15/2019 3:23:38PM
16	0000000078	PRODUCT	A	34301 042919	test deny	ERICG0511002	04/29/2019 1:46:33PM	ERICG0511002	D	D	04/29/2019 2:22:19PM	MARYK0825003	04/29/2019 2:22:19PM
17	0000000096	PRODUCT	A	34301 122229	test comment_Cancel	mitz1015001	05/14/2019 10:02:18AM	mitz1015001	P	P	05/14/2019 10:02:28AM	mitz1015001	05/14/2019 10:02:27AM
18	0000000076	CHARTFIELD1	A	34301 042919	test cancel	ERICG0511002	04/29/2019 10:46:41AM	ERICG0511002	C	D	04/29/2019 11:06:08AM	ERICG0511002	04/29/2019 11:47:27AM

6. **Supporting Documentation** – If the business justification is sufficient as an explanation for the purpose, no attachment is required.

Appropriate Attachments for Programs, User Codes and Locations include:

- PDF of TCA if relevant
- Agreement and/or Contract
- Request memo/letter

Appropriate Attachments for Department IDs should include the appropriate checklist.

Adding an attachment – Click the blue Hyperlink on the CF REQ page:

1. Click Attachment
2. Click Add Attachment
3. Click browse and locate document to attach
4. Click Upload
5. Click ok

The screenshot displays the 'Request Attachments' interface. At the top, there is a header 'Request Attachments' and a sub-header 'Request ID NEXT'. Below this is a 'Details' section with a search bar and a table. The table has four columns: 'File Name', 'Show to Approver?', 'User', and 'Name'. The first row contains the text 'View', a checked checkbox, and two empty cells. Below the table, a note states: 'Adding large attachments can take some time to upload, therefore, it is advisable to save the transaction before adding large attachments.' There are three buttons: 'Add Attachment', 'OK', and 'Cancel'. Below this is a 'File Attachment' dialog box with a 'Browse...' button and 'Upload' and 'Cancel' buttons.

File Name	Show to Approver?	User	Name
View	<input checked="" type="checkbox"/>		

Checklist for Department ID Inactivation with Payroll

Complete and attach this checklist to the Chartfield Request for 10 digit Department ID inactivation requests that contains payroll. A checklist will need to be completed for each request.

In conjunction with the request for the inactivation of this department id the requestor must consider the need for each of the following listed Edison HCM and FSCM related items, and through use of the dropdown (YES or NA), indicate whether action (for example the submission of a form or interagency notification) will be required following department id inactivation. This consideration may require communication and collaboration with other responsible/impacted staff within the requestor's agency.

For items requiring the submission of an add or change form, submission should not be attempted until the requestor has received notification of department id inactivation.

Department ID

Position Change Request (ePCR) within HCM module of Edison.

Speedchart Requests including cashiering (Add/Change) (To Division of Accounts)

Taskgroup Update (To Division of Accounts)

Default Task Group (To Division of Accounts),

Payroll Distribution (Default Payroll Accounting) (To Division of Accounts)

Employee Default Change Request (To Division of Accounts)

New or updated Agency User Security Authorization forms

Updates needed to be made to dynamic group descriptions (Updates sent to Edison.Dynamic.Group@tn.gov)

Updates to any grants or projects

Notification to billing agencies for any new speedcharts updates (See Edison FSCM *Multi-Unit Journal Support and Contact Information*)

If this department ID will replace an existing Department ID on the Department of Revenue apportionment schedule, the agency has notified the Department of Revenue to make needed changes.

The agency has identified any accrual reversals requiring a journal entry to affect the department ID changes (subsequent journal entry to be completed once new department ID is added).

PRINTED NAME AND TITLE OF EMPLOYEE COMPLETING CHECKLIST

SIGNATURE OF EMPLOYEE COMPLETING CHECKLIST

By signing below, I certify that I have reviewed all items above and the Agency is committed to immediately take necessary action following confirmation that the department ID inactivation has been processed.

SIGNATURE OF CONTROLLER/FISCAL OFFICER

Checklist for Department ID Inactivation with No Payroll

Complete and attach this checklist to the Chartfield Request for 10 digit Department ID inactivation requests that do NOT contain payroll. A checklist will need to be completed for each request.

In conjunction with the request for the inactivation of this department id, the requestor must consider the need for each of the following listed Edison FSCM related items, and through use of the dropdown (YES or NA), indicate whether action (for example the submission of a form or interagency notification) will be required following department id inactivation. This consideration may require communication and collaboration with other responsible/impacted staff within the requestor's agency.

For items requiring the submission of an add or change form, submission should not be attempted until the requestor has received notification of department id establishment.

Department ID

Speedchart Requests including cashiering (Add/Change) (To Division of Accounts)

New or updated Agency User Security Authorization forms

Updates to any grants or projects

Notification to billing agencies for any new speedcharts updates (See Edison FSCM *Multi-Unit Journal Support and Contact Information*)

If this department ID will replace an existing Department ID on the Department of Revenue apportionment schedule, the agency has notified the Department of Revenue to make needed changes.

The agency has identified any accrual reversals requiring a journal entry to affect the department ID changes (subsequent journal entry to be completed once new department ID is added).

PRINTED NAME AND TITLE OF EMPLOYEE COMPLETING CHECKLIST

SIGNATURE OF EMPLOYEE COMPLETING CHECKLIST

By signing below, I certify that I have reviewed all items above and the Agency is committed to immediately take necessary action following confirmation that the department ID inactivation has been processed.

SIGNATURE OF CONTROLLER/FISCAL OFFICER

Checklist for Department ID Adds with Payroll

Complete and attach this checklist to the Chartfield Request for new 10 digit Department ID requests that contains payroll. A checklist will need to be completed for each request.

In conjunction with the request for the establishment of this department id the requestor must consider the need for each of the following listed Edison HCM and FSCM related items, and through use of the dropdown (YES or NA), indicate whether action (for example the submission of a form or interagency notification) will be required following department id establishment. This consideration may require communication and collaboration with other responsible/impacted staff within the requestor's agency.

For items requiring the submission of an add or change form, submission should not be attempted until the requestor has received notification of department id establishment.

Department ID

Position Change Request (ePCR) within HCM module of Edison.

Speedchart Requests including cashiering (Add/Change) (To Division of Accounts)

Taskgroup Update (To Division of Accounts)

Default Task Group (To Division of Accounts),

Payroll Distribution (Default Payroll Accounting) (To Division of Accounts)

Employee Default Change Request (To Division of Accounts)

New or updated Agency User Security Authorization forms

Updates needed to be made to dynamic group descriptions (Updates sent to Edison.Dynamic.Group@tn.gov)

Updates to any grants or projects

Notification to billing agencies for any new speedcharts updates (See Edison FSCM *Multi-Unit Journal Support and Contact Information*)

If this department ID will replace an existing Department ID on the Department of Revenue apportionment schedule, the agency has notified the Department of Revenue to make needed changes.

The agency has identified any accrual reversals requiring a journal entry to affect the department ID changes (subsequent journal entry to be completed once new department ID is added).

PRINTED NAME AND TITLE OF EMPLOYEE COMPLETING CHECKLIST

SIGNATURE OF EMPLOYEE COMPLETING CHECKLIST

By signing below, I certify that I have reviewed all items above and the Agency is committed to immediately take necessary action following confirmation that the department ID has been created.

SIGNATURE OF CONTROLLER/FISCAL OFFICER

Checklist for Department ID Adds with No Payroll

Complete and attach this checklist to the Chartfield Request for new 10 digit Department ID requests that do NOT contain payroll. A checklist will need to be completed for each request.

In conjunction with the request for the establishment of this department id the requestor must consider the need for each of the following listed Edison FSCM related items, and through use of the dropdown (YES or NA), indicate whether action (for example the submission of a form or interagency notification) will be required following department id establishment. This consideration may require communication and collaboration with other responsible/impacted staff within the requestor's agency. For items requiring the submission of an add or change form, submission should not be attempted until the requestor has received notification of department id establishment.

Department ID

Speedchart Requests including cashiering (Add/Change) (To Division of Accounts)

New or updated Agency User Security Authorization forms

Updates to any grants or projects

Notification to billing agencies for any new speedcharts updates (See Edison FSCM *Multi-Unit Journal Support and Contact Information*)

If this department ID will replace an existing Department ID on the Department of Revenue apportionment schedule, the agency has notified the Department of Revenue to make needed changes.

The agency has identified any accrual reversals requiring a journal entry to affect the department ID changes (subsequent journal entry to be completed once new department ID is added).

PRINTED NAME AND TITLE OF EMPLOYEE COMPLETING CHECKLIST

SIGNATURE OF EMPLOYEE COMPLETING CHECKLIST

By signing below, I certify that I have reviewed all items above and the Agency is committed to immediately take necessary action following confirmation that the department ID has been created.

SIGNATURE OF CONTROLLER/FISCAL OFFICER

Checklist for Department ID Updates/Changes with Payroll

Complete and attach this checklist to the Chartfield Request for 10 digit Department ID update/change requests that contains payroll. A checklist will need to be completed for each request.

In conjunction with the request for the update/change of this department id, the requestor must consider the need for each of the following listed Edison HCM and FSCM related items, and through use of the dropdown (YES or NA), indicate whether action (for example the submission of a form or interagency notification) will be required following department id update/change. This consideration may require communication and collaboration with other responsible/impacted staff within the requestor's agency.

For items requiring the submission of an add or change form, submission should not be attempted until the requestor has received notification of department id establishment.

Department ID

Position Change Request (ePCR) within HCM module of Edison.

Speedchart Requests including cashiering (Add/Change) (To Division of Accounts)

Taskgroup Update (To Division of Accounts)

Default Task Group (To Division of Accounts),

Payroll Distribution (Default Payroll Accounting) (To Division of Accounts)

Employee Default Change Request (To Division of Accounts)

New or updated Agency User Security Authorization forms

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Notification to billing agencies for any new speedcharts updates (See Edison FSCM *Multi-Unit Journal Support and Contact Information*)

PRINTED NAME AND TITLE OF EMPLOYEE COMPLETING CHECKLIST

SIGNATURE OF EMPLOYEE COMPLETING CHECKLIST

By signing below, I certify that I have reviewed all items above and the Agency is committed to immediately take necessary action following confirmation that the department ID request has been processed.

SIGNATURE OF CONTROLLER/FISCAL OFFICER

Checklist for Department ID Update/Change with No Payroll

Complete and attach this checklist to the Chartfield Request for 10 digit Department ID update/change requests that do NOT contain payroll. A checklist will need to be completed for each request.

In conjunction with the request for the update/change of this department id, the requestor must consider the need for each of the following listed Edison FSCM related items, and through use of the dropdown (YES or NA), indicate whether action (for example the submission of a form or interagency notification) will be required following department id update/change. This consideration may require communication and collaboration with other responsible/impacted staff within the requestor's agency.

For items requiring the submission of an add or change form, submission should not be attempted until the requestor has received notification of department id establishment.

Department ID

Speedchart Requests including cashiering (Add/Change) (To Division of Accounts)

New or updated Agency User Security Authorization forms

Updates to any grants or projects

Notification to billing agencies for any new speedcharts updates (See Edison FSCM *Multi-Unit Journal Support and Contact Information*)

PRINTED NAME AND TITLE OF EMPLOYEE COMPLETING CHECKLIST

SIGNATURE OF EMPLOYEE COMPLETING CHECKLIST

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SIGNATURE OF CONTROLLER/FISCAL OFFICER