



Project/Grant Chartfield Add/Change Form

Form Use: Used for adding or requesting changes to any of the Project/Grant Chartfields used by the University.

Request Type: New (Crosswalk form required) Update

Requestor:

Today's Date: **Requested Completion Date:**

Set ID: **Project/Grant:**

Effective Date: **Status:** Active Inactive

Description:

Project/Grant Type: Project Grant

Project/Grant Status: Proposed In Progress **Start Date:** **End Date:**

Manager Name:

Integration:

Description (long):

Budgeting Business

User: **Budgets User:**

Control Rules:

Overall Project/Grant Amount:

- Overall Project/Grant Control Budget Period Override
- Budget Line Level (project only) Allow Overdraft
- Funding Source Control



University of
Massachusetts

Project/Grant Chartfield Add/Change Form

Grant Attributes 1:

Account Code:

Dept Admin:

Grant Campus Location:

F&A Rate:

F&A Base:

Program:

Financial Report Due Date:

Expiration Date:

Grant Attributes 2:

Fund Type: Fed Direct Fed P-Thru Not Fed

Funding Agency Type:

CFDA Number:

CFDA Type:

Funding Agency:

Letter of Credit (LOC) Number:

Reimbursement Method:

Related Project/Grant Ref:

Pre-Award Spending

FA Revenue Distribution:

Validated F&A Distribution

Department Value:

F&A Distribution Percentage:

Department Value:

F&A Distribution Percentage:

Department Value:

F&A Distribution Percentage:

Approver 1:

Approver 2:

For Maintenance Team Only:

Completed By:

Date Completed:

Resolution/Comments:

Maintenance Checklist (for New Project/Grant Only)

- Update Crosswalk
- Update all Project/Grant Trees
- Update Allocation Tree
- Update Workflow (If applicable)

Date Completed: