

Requesting a New Endowed Project

The NUFinancials Chartfield Maintenance request form allows staff with access to NUFinancials to request a new chartfield value or update to an existing value. New endowed Project ID requests require additional review to ensure proper Chartfield set-up. The process is outlined below:

Gift Acceptance & Fund Management team works with school/unit to establish endowed project
<ul style="list-style-type: none">• Department ID and project attributes/purpose are determined based on the gift agreement
Gift Acceptance and Fund Management submit Chartfield Request in NU Financials and must be approved by Accounting Services
<ul style="list-style-type: none">• The department, Gift Acceptance and Fund Management, and Accounting Services are required to review the Chartfield request before it can be approved• Any additional parties to be notified of project completion must be explicitly included in Question 3 of the NUFinancials request form• Fund memos and gift agreements are not attached to endowed projects as support in order to ensure the confidentiality of donor identification and other personal information
Financial Operations IT update NUFinancials
<ul style="list-style-type: none">• Once the system is updated, Chartfield Maintenance notify multiple interested parties, including the school/unit, that the project has been created or updated via email• If applicable, a spending budget is established at this time
Gift and Record Services will reallocated of any gifts
<ul style="list-style-type: none">• Once notified via the chartfield completion email that the fund has been established, Gift and Record Services moves all gifts from TBD into the new project.
Gift Acceptance and Fund Management distribute a completed fund memo
<ul style="list-style-type: none">• The school/unit may save fund memo and other relevant details into existing systems of record

Please note the following:

- For any changes to active endowed projects, such as attribute changes, department changes, or name updates, please contact [Gift Acceptance and Fund Management](#) **before** making changes to NUFinancials. They will update fund memos and review for compliance with the gift agreement.
- Set up and updates to expendable gifts are processed by the department. Additional information can be found [here](#).

Please reference the Chartfield Maintenance [website](#) and guides for any questions about using the Chartfield Request tool in NUFinancials. Questions can be sent to [Chartfield Maintenance](#).

Key Contacts

[Chartfield Maintenance](#), Accounting Services at

[Gift Acceptance and Fund Management](#), Alumni Relations and Development