**Chart of Accounts (COA) Maintenance**

**PROGRAM REQUEST - NEW**

Use this form to request the setup of a program. The effective date for a program is April 1 of the current fiscal year.

A program is a group of related activities directed toward the accomplishment of a set of identifiable objectives.

Refer to Guide: Chart of Accounts (COA) for further information on program including budget options.

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| If requesting a high volume, contact fscoarpt@ualberta.ca for a more expedient means of processing. |

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| Program number(5 characters starting with first 2 numbers of deptID) | Program name(max. 30 characters) | Manager = Position name, Department name (max. 30 characters)(e.g. Director,Communications) | Budget [[1]](#footnote-1) | The purpose of the information below is to assess the appropriateness of the request for a new program. |
| Purpose | Anticipated annual dollar amount |
|  |  |  | [ ]  program is budgeted and should be added to the COA\_PROGRAM\_DETAIL tree |  |  |
| Budget variance carries forward to the deptID (default). If not check below[ ]  program budget variance carries forward to itself[[2]](#footnote-2) under deptID \_\_\_\_\_\_\_\_\_  |
|  |  |  | [ ]  program is budgeted and should be added to the COA\_PROGRAM\_DETAIL tree |  |  |
| Budget variance carries forward to the deptID (default). If not check below[ ]  program budget variance carries forward to itself2 under deptID \_\_\_\_\_\_\_\_\_ |
|  |  |  | [ ]  program is budgeted and should be added to the COA\_PROGRAM\_DETAIL tree |  |  |
| Budget variance carries forward to the deptID (default). If not check below[ ]  program budget variance carries forward to itself2 under deptID \_\_\_\_\_\_\_\_\_  |
|  |  |  | [ ]  program is budgeted and should be added to the COA\_PROGRAM\_DETAIL tree |  |  |
| Budget variance carries forward to the deptID (default). If not check below[ ]  program budget variance carries forward to itself2 under deptID \_\_\_\_\_\_\_\_\_  |

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| **ADD PROGRAM TO EXISTING REPORT** Note: only applicable if currently using program reporting. If other report maintenance is required, complete the nVision Report form. |
| Program number | Existing nVision report ID (report ID can be found in the top left corner of your nVision report) |
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| **ROUTING INSTRUCTIONS**Senior Financial Officer (SFO) emails completed form to Financial Services, fscoarpt@ualberta.ca.ChartField requests will be processed on the first business day of each week for all requests received the previous week; SFO will be notified if this timing cannot be met. For high volume requests (50 or more), FS will open a helpdesk ticket to process the request and will notify the unit when the request has been processed. |

1. SFO must contact Resource Planning to set up budget [↑](#footnote-ref-1)
2. If program budget variance carries forward to itself, FS will automatically set up the program as budgeted. [↑](#footnote-ref-2)