

Requesting a New Endowed Project

The NU Financials Chartfield Maintenance request allows staff with access to NU Financials to request a new Chartfield value or update to an existing value. New endowed Project ID requests require additional review to ensure proper Chartfield setup. The process is outlined below.

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| Gift Acceptance & Fund Management team works with school/unit to establish endowed project |
| <ul style="list-style-type: none">x 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">x The department, Gift Acceptance and Fund Management, and Accounting Services are required to review the Chartfield request before it can be approvedx Any additional parties to be notified of project completion must be explicitly included in Question 3 |
| Financial Operations IT update NU Financials |
| <ul style="list-style-type: none">x Once the system is updated, Chartfield Maintenance notify multiple interested parties, including the school/unit, that the project has been created or updated via emailx If applicable, a spending budget is established at this time |
| Gift and Record Services will reallocate of any gifts |

Please note the following:

- x 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 NU Financials. They will update fund memos and review for compliance with the gift agreement.
- x 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 [guaaart27\(b\)-0i](#) [Chartfield Maintenance](#) [#f AS3\(q\(A\)1u3\(t\)-3\(h\)26.7](#)

Key Contacts

[Chartfield Maintenance](#), Accounting Services at

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