| **Step** | **Action** |
| --- | --- |
| 1.
 | Click on **Main Menu** |
| 1.
 | Scroll down and click the **Set Up Financials/Supply Chain** menu. |
| 1.
 | Click the **Common Definitions** menu. |
| 1.
 | Click the **Design ChartFields** menu. |
| 1.
 | Click the **Define Values** menu. |
| 1.
 | Click the **ChartField Request** menu. |
| 1.
 | Click on the **Find an Existing Value** tab.  |
| 1.
 | Enter your agency SETID into the **SetID** field. Enter "**17300**". |
| 1.
 | Click the magnifying glass next to the Field Name to display the Look Up and click on the **FUND\_CODE** link. |
| 1.
 | Clear the**Field Action** value. |
| 1.
 | Enter the Fund Code value into the **Field Value** field. Enter "**9999**". |
| 1.
 | Click the Search button. |
| 1.
 | Click the **Copy** button at the top of the screen |
| 1.
 | On the **Request Copy** popup, click the dropdown next to the Field Action and choose **Update.** |
| 1.
 | Click on the **Field Value** field and enter the Fund Code being updated. Enter "**9999**". |
| 1.
 | Click the **OK** button. |
| 1.
 | Click the **Effective Date** link and change to the effective date of the Update -- Today's date or a date in the future. |
| 1.
 | To request the Fund Code be inactivated, click the dropdown and choose the **Inactive** list item. To make a change leave Status as **Active**. |
| 1.
 | For updates, click in the **Description** field and change the description. |
| 1.
 | For updates, click in the **Short Description** field and change the short description. |
| 1.
 | Click in the **Fund Effective Date** field and update with the same value as the **Effective Date.** |
| 1.
 | Click in the **Requested Due Date** field and enter the request due date. |
| 1.
 | Other updates may include ChartField Attributes changes, Allow fund to go Negative change, or ADB calculation change.  See the **Add a Fund** UPK for additional information. |
| 1.
 | After reviewing the questions, click the **Submit for Approval** list item at the bottom of the page. |
| 1.
 | Click the **Go** button to Submit the Request into workflow. |
| 1.
 | Click the **View Approval Flow** link to see the workflow. |
| 1.
 | **Approval Flow** is displayed.  The Request will need to be approved by the **Agency Chartfield Approver** and the **Central Chartfield Approver.** After approval the ChartField will be available in SMART. |
| 1.
 | **End of Procedure.** |