

OFFICE OF THE CONTROLLER

Chartfield Maintenance and Inquiry Training

February 2026





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USC Chartfields



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South Carolina

What is a Chartfield?

A ChartField is a data field that stores accounting information, affects budget and is used for internal and external reporting. All accounting systems consist of codes used to identify transactions and to track financial activity.

USC required chartfields are:

CHART OF ACCOUNTS - CHARTFIELDS - FOR PEOPLESOFT FINANCE					
Business Unit XXXXX	Account XXXXX	Operating Unit XXXXX	Department XXXXXX	Fund XXXXX	Class XXX
<i>USC Legal Entity</i>	<i>Transaction Type</i>	<i>Campus, College, Division</i>	<i>Department</i>	<i>Source of Funding</i>	<i>Functional Account Category</i>
WHICH responsible entity?	WHAT are we doing with our dollars?	WHO is spending the funds?	WHO is spending?	WHERE is the funding?	HOW are we spending the funds?



PeopleSoft Chart of Accounts

Updated March 2022



CHART OF ACCOUNTS - CHARTFIELDS - FOR PEOPLESFT FINANCE						
Business Unit XXXXX	Account XXXXX	Operating Unit XXXXX	Department XXXXXX	Fund XXXXX	Class XXX	Product XXXXXX
<i>USC Legal Entity</i>	<i>Transaction Type</i>	<i>Campus, College, Division</i>	<i>Department</i>	<i>Source of Funding</i>	<i>Functional Account Category</i>	<i>Academic Terms</i>
WHICH	WHAT	WHO	WHO	WHERE	HOW	WHEN
responsible entity?	are we doing with our dollars?	is spending the funds?	is spending?	is the funding?	are we spending the funds?	is the related term?
<ul style="list-style-type: none"> • USC01 	<ul style="list-style-type: none"> • Assets • Liabilities • Fund Balance • Expenses • Revenues Examples: 10300, 21221, 48650, 53005	<ul style="list-style-type: none"> • Finance • Law School • Aiken Examples: CL010, CL043, AK000	<ul style="list-style-type: none"> • Chemistry • Human Resources • Aiken Examples: 130200, 620100, 910000	<ul style="list-style-type: none"> • Tuition/Appropriations • Sales and Services • Federal Grant Examples: A0001, E3170, F1000	<ul style="list-style-type: none"> • Instruction • Research • Fiscal • Operations Examples: 101, 202, 602	<ul style="list-style-type: none"> • Fall • Spring • Summer Examples: 202108, 202201, 202205
<i>Required on all transactions</i>	<i>Required on all transactions</i>	<i>Required on all transactions</i>	<i>Required on all transactions</i>	<i>Required on all transactions</i>	<i>Required on all transactions</i>	<i>Used on term specific Transactions (from Banner)</i>

REQUIRED for Project Transactions		
PC Business Unit XXXXXX	Project ID XXXXXXXXXX	Activity ID X
WHY	WHY	Required Chartfield
are we spending the funds?	are we spending the funds?	
<ul style="list-style-type: none"> • Sponsored Programs • Construction Projects • Internal Projects • Endowments • Student Activities Examples: USCSP, USCCP, USCIP, USCEN, USCSA	<ul style="list-style-type: none"> • Grants • Capital Projects • Internal Projects • Endowments • Student Activities Examples: 1009009, 50000104, 80000173, E0000125, S0000450	<ul style="list-style-type: none"> • USC only uses 1

OPTIONAL
Cost Share XXXXXXXXXX
WHAT
is the transaction cost share?
<ul style="list-style-type: none"> • Use the project ID that the cost share expense is related to Example: 10009009

Operating Unit - XXXXX

Campus, College, Division

Who – is spending the funds?

- Finance
- Law School
- Aiken

Examples: CL010, CL043, AK000

Required on all transactions

Notes:

- Each operating unit begins with two letters. The letters indicate the campus. CL represents Columbia campus.
- It is a **balancing** chartfield. Whenever an entry between two operating units occurs, cash will automatically be transferred.



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Department - XXXXXX

Department

Who – is spending?

- Chemistry
- Human Resources
- Beaufort

Examples: 130200, 620100, 920000

Required on all transactions

Notes:

- Departments are cost centers under operating units in USC's Organizational Chart.
- Departments are not term-limited and intended to be ongoing/permanent.



Department Types

There are two types of departments:

1. **Budgetary Only Departments:** HCM Home Departments created for HCM PeopleSoft security/workflow purposes only and therefore do not have financial transactions in PeopleSoft Finance.
2. **Financial Departments:** Departments with financial transactions that can be used in both HCM and Finance PeopleSoft.
 - a) Funding – funding only departments can be used to as source of funding for payroll transactions but not does not “house” employees.
 - b) Organizational – departments that will become part of your Official Organizational Chart for reporting; set up for security and workflow and “house” employees.
 - c) Both – the department is established as organizational and funding source for payroll transactions.



Fund - XXXXX

Source of Funding

Where – is the funding coming from?

- Tuition/Appropriations
- Sales and Services
- Federal Grant

Examples: A0001, E3170, F1000

Required on all transactions

Notes:

- It is a **balancing** chartfield. Whenever an entry between two operating units occurs, cash will automatically be transferred.
- Use the [Fund Matrix](#) to help identify which fund to use on the Chartfield Maintenance Request form.



Class - XXX

Functional Account Category

How – are we spending the funds?

- Instruction
- Research
- Institutional Support

Examples: 101, 202, 602

Required on all transactions

Notes:

- Important for audited financial statements.
- Used to determine what goes on the HERD Survey. Research class codes are reported to the National Science Foundation.
- U.S. Dept of Education (IPEDS) report uses the class code to standardize reporting in a way that makes our data comparable to other higher education institutions.



PC Business Unit - XXXXX

Type of Projects

Why – are we spending the funds?

- USCSP – Sponsored Projects
- USCCP – Capital Projects
- USCIP – Internal Projects
- USCEN – Endowments
- USCSA – Student Activities

Required on all Project transactions



Project ID - XXXXXXXXX

Project ID number assigned

Why – are we spending the funds?

- 1xxxxxxx – Sponsored Projects
- 5xxxxxxx – Capital Projects
- 8xxxxxxx – Internal Projects
- Exxxxxxx – Endowments
- Sxxxxxxx – Student Activities

Examples: 10009009, 50000104, 80000173, E0000125, S0000450

Required on all Project transactions

Notes:

- It is a balancing chartfield. Whenever an entry involving a project occurs; cash will automatically be transferred.



PeopleSoft Chart of Accounts

Updated March 2022



CHART OF ACCOUNTS - CHARTFIELDS - FOR PEOPLESFT FINANCE						
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OPTIONAL
Cost Share XXXXXXXXXX
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Requesting a New Chartfield



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South Carolina

Chartfield Maintenance

Purpose – To add, change, or inactivate chartfield strings on the Chart of Accounts on the crosswalk within our financial systems.

A **Chartfield Maintenance Request Form** must be filled out along with any required supporting documentation and submitted to CFMaint@mailbox.sc.edu mailbox for review and processing.

The following forms can be found on the Office of Controller's website:

- Chartfield Maintenance Request Form
- E Fund Questionnaire
- Custodial Fund Questionnaire

[Chart of Accounts - Office of the Controller | University of South Carolina \(sc.edu\)](#)



Chartfield Maintenance Request Form

You can use the Chartfield Maintenance Request Form to:

- Request new Departments.
- Request new Funds.
- Request new USCIP and USCSA projects.
- Change a description for a chartfield or chartfield string (Renaming only; re-purposing is not allowed).
- Extend an existing USCIP or USCSA project.
- Inactivate USCIP and USCSA projects.

Inactivation of a project or chartfield must:

- Have a zero balance.
- Have no open encumbrances, travel advances, accounts receivable, or prepaid card balances.
- Payroll Account changes to update employees funding or home department must be updated.
- Cannot have assets or active leases (must be transferred).



Completing a Chartfield Request Form

UNIVERSITY OF South Carolina
Chartfield Request Form
 Please email completed forms to CFMAINT@MAILBOX.SC.EDU

1 Please select type: _____

Combination Description _____ 2

ChartField String _____ 3

Operating Unit Department Fund Class PC Business Unit

4 Project (if inactivating) _____

Project type (if applicable) _____ 5

Project Start Date Project End Date

For NEW Department or Project: Approver(s) 1* USCID(s) 1 _____

For NEW USCIP PROJECT: Design Principal Investigator (PI)*: Approver(s) 2* USCID(s) 2 _____

USCID: _____

7 *must be an active employee

Mark for Payroll? _____ Select "Yes" if you need HCM Payroll Combo Codes created for this chartstring.

Attach justification _____ 8

Why new department?
 Why new project? How much to be transferred into new account and from where?
 If E fund – attach E Fund questionnaire
 If Z fund – attach Z Fund questionnaire

FOR NEW DEPARTMENT REQUESTS ONLY – PLEASE SEE BELOW:

Does this NEW department need to be added to your Organizational Chart within PeopleAdmin or is it for payroll funding only? Funding Only
 (Will the NEW Department need to create PD's, job postings, and hire employees within it?)

If you answered "Yes" above, please provide the Parent Department Number where this NEW department will roll up to. _____

9 Requested by _____ Date _____

Business Manager _____ Date _____

1. Select Type of Action: Add/Change/Inactivate
2. Provide a Combination Description/Name
3. Enter chartfield string
4. Enter Project (only if requesting inactivation)
5. Enter Project Type, Start and End dates (when requesting projects/extensions)
6. Enter the name of Approvers and PI (when requesting projects) & their USCIDs
7. Will this chartfield have payroll?
8. Include Justification and any additional supporting documentation
9. Signature & Approval

New Departments Only

If you are requesting a new Department and plan to have payroll expenses – you must complete the last two questions on the form regarding PeopleAdmin.

- Controller's Office will send the form to HR
- HR will contact the department if they have questions
- Once reviewed and approved, the new department is added to the Department Tree in HCM PeopleSoft and available to select on ePAF forms

Does this department need to be added to PeopleAdmin (Will you be creating PD's, postings, and hiring employees into this department?)

If you answered "Yes" above, please provide the Parent Department Number where this new department will roll up to.

Note: New Department requests must have justification and be part of your organizational chart/structure. These requests will be limited.



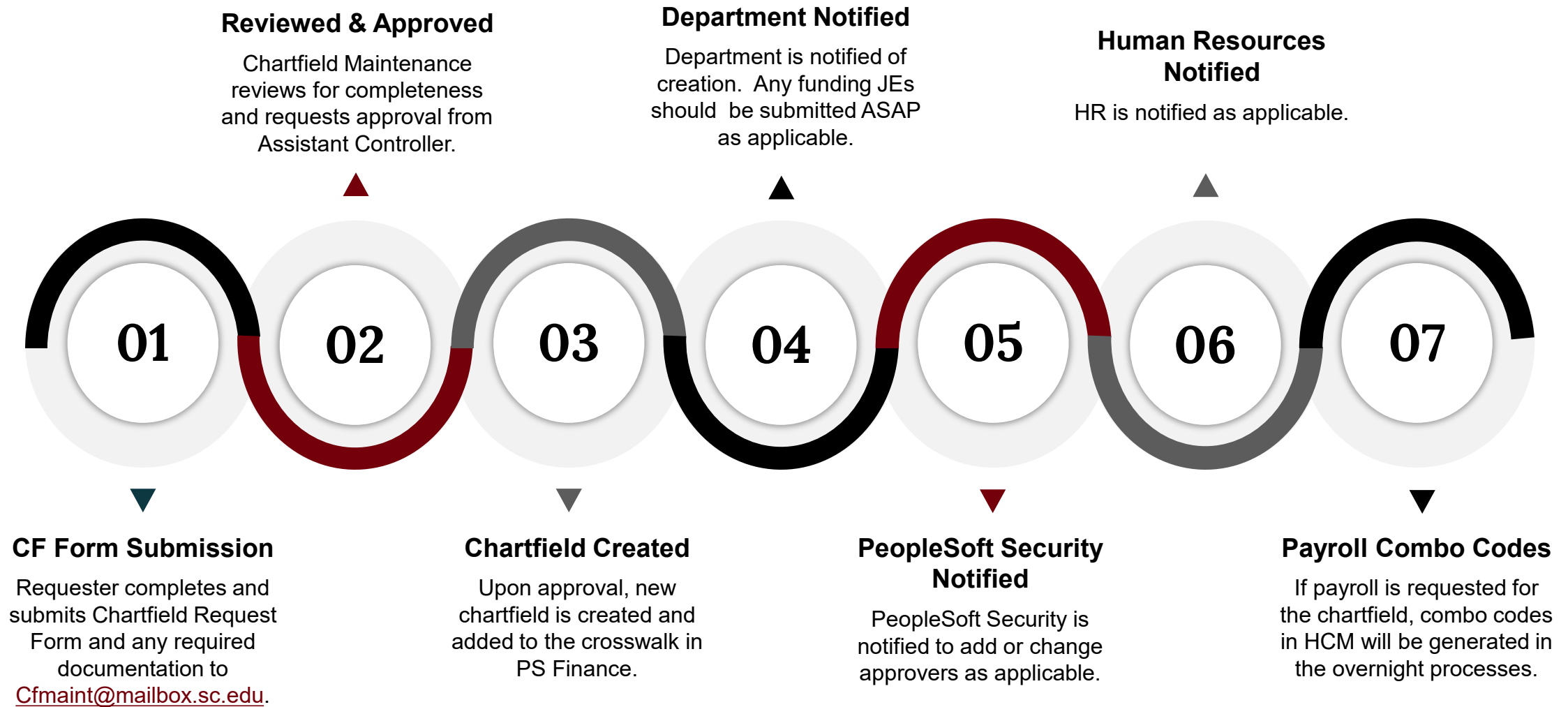
Departments vs. Projects

What is the difference between a department and a project:

- **Departments** are part of your organizational chart and are considered permanent and ongoing.
- **Projects** are limited in scope and term and are funded by an existing department. Projects are created for up to a 5-year term and can be extended as needed by submitting a request to CFMaint@mailbox.sc.edu.



Chartfield Form Process



Chartfield Maintenance: Tips & Tricks

Two types of projects are maintained through this form and mailbox:

- Internal Projects (USCIP) and Student Activity Projects (USCSA)

When inactivating a project, please provide the full chartfield.

Repurpose vs. Renaming: Chartfields cannot be repurposed, but names and descriptions can be updated if necessary. Descriptions must be aligned with the original intent of the department/project.

- Rather than repurpose a chartfield, inactivate the unused one and request a new chartfield

Regularly review balances and end dates of your USCSA and USCIP Projects.

Negative balances must be funded, ended projects should be extended or inactivated as needed.

Use the Non-USCSP Project Dashboard to review project cash balances.

- To access this dashboard, log into <https://financeintranet.sc.edu> and navigate to **Finance Intranet > Non-USCSP Project Dashboard**.



Using the USC CoA Combos Inquiry in Finance PeopleSoft



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Using the USC CoA Combos Inquiry

Use this tool to:

- View any chartfield on our Chart of Accounts (CoA) by Operating Unit, Department, Fund, Project Type, etc.
- Search for active or inactive chartfields.
- View history of chartfields.
- Assist in finding needed chartstrings when making corrections for JEs, JVs, and APEXs.
- Search for Cost Share.



USC CoA Combos Inquiry

Tips and Tricks:

- If looking for a chartfield that became inactive in a prior fiscal year, remove the Fiscal Year field information to return all the chartfield strings regardless of fiscal year so that you can see when the chartfield was inactivated.
- Use the wildcard to look up multiple values “%”.
- Combo Key **vs.** Combo Code:

COMBO KEY	COMBO CODE
Used in PS Finance . Unique identifier for chartfield string. For USCSP it also represents the USCeRA identifier.	Used in PS HCM Payroll . Used in all payroll funding transactions.

Using a Wildcard in PeopleSoft

A **wildcard** is a character that stands for one or more characters. You can use wildcards to help you search for data in character fields. The percentage sign, %, is a wildcard that can be helpful in finding the exact information you want to process.

The screenshot shows the PeopleSoft interface for the 'USC CF Combos Inquiry' page. The breadcrumb trail is: Favorites > Main Menu > USC Conversion > USC Chartfield Mapping > USC CoA Combos Inquiry. The page header includes the University of South Carolina logo and a search bar with 'All' selected and 'Search' button. Below the header, there is a green button labeled 'USC CF Combos Inquiry'. The search filters are arranged in two rows. The first row includes: USC Combo Key (input), Fiscal Year From (2023), Fiscal Year To (2023), Status (dropdown), and a checkbox for 'Payroll Only?'. The second row includes: Operating Unit (input), Department (115000), Fund Code (E%), Class Field (input), and a checkbox for 'Include Cost Share?'. A third row includes: PC Business Unit (input), Project (input), Activity (input), and Product (input). A 'Search' button is located below the filters. Below the filters is a table with 12 columns: USC Combo Key, Description, Fiscal Year, Status, Operating Unit, Department, Fund Code, Class Field, PC Business Unit, Project, and Activity. The table contains 4 rows of data.

	USC Combo Key	Description	Fiscal Year	Status	Operating Unit	Department	Fund Code	Class Field	PC Business Unit	Project	Activity
1	11500E150	RESEARCH INCENTIVE	2023	Active	CL034	115000	EN700	202	USCIP	80000075	1
2	11500E159	IPEHD IDC ACCOUNT	2023	Active	CL034	115000	E1166	202			
3	11500E163	DIVERSITY ENHANCEMENT ASPH	2023	Active	CL034	115000	E2633	202			
4	11500E165	STARTUP/LEE PEARSON	2023	Active	CL034	115000	EN300	202	USCIP	80002004	1

Using the Chartfield Values in Finance PeopleSoft

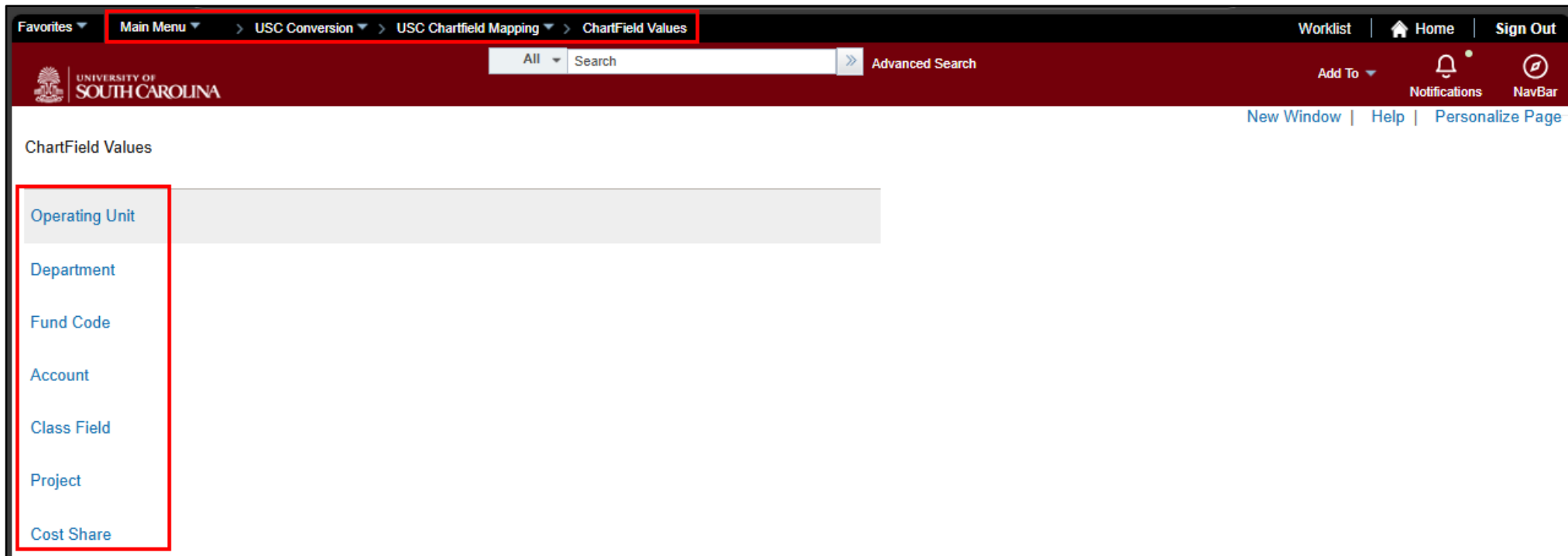


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What is Chartfield Values?

The **Chartfield Values** is a tool within PeopleSoft Finance that will allow you to search all the active and inactive values by specific chartfield.

PeopleSoft Finance Navigation: Main Menu > USC Conversion > USC Chartfield Mapping > Chartfield Values



The screenshot displays the PeopleSoft Finance interface for the 'ChartField Values' page. The breadcrumb navigation at the top reads: 'Main Menu > USC Conversion > USC Chartfield Mapping > ChartField Values'. The page header includes the University of South Carolina logo and a search bar. The main content area is titled 'ChartField Values' and features a list of chartfield categories on the left side, which are highlighted with a red box:

- Operating Unit
- Department
- Fund Code
- Account
- Class Field
- Project
- Cost Share

The right side of the page contains utility links: 'New Window | Help | Personalize Page'.

Chartfield Values - Example

Favorites Main Menu > USC Conversion > USC Chartfield Mapping > ChartField Values Worklist

All Search Advanced Search

UNIVERSITY OF SOUTH CAROLINA

Department

Find an Existing Value ⊕ Add a New Value

Search Criteria

Enter any information you have and click Search. Leave fields blank for a list of all values.

Recent Searches Choose from recent searches Saved Searches Choose from saved searches

*SetID = USC01

Department begins with

Description begins with

^ Show fewer options

Case Sensitive Include History Correct History

Search Clear Save Search

Chartfield Values allows you to search by chartfield, using the alpha-numeric value OR description.

Begin by selecting the chartfield you would like to search. For this example, we will select **Department** to open the **Find an Existing Value** screen.

Chartfield Values – Department

The screenshot shows the 'Chartfield Values' page for the University of South Carolina. The breadcrumb trail is 'Favorites > Main Menu > USC Conversion > USC Chartfield Mapping > ChartField Values'. The page title is 'Department'. There is a search bar with 'All' and 'Search' options, and an 'Advanced Search' link. A 'Find an Existing Value' button is highlighted with a red box, along with the 'Department' label. Below this is a 'Search Criteria' section with instructions: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' There are two dropdown menus for 'Recent Searches' and 'Saved Searches'. The main search area has a field for '*SetID' with a dropdown set to '=' and a text input containing 'USC01'. Below this, the 'Department' field has a dropdown set to 'begins with' and a text input. The 'Description' field also has a dropdown set to 'begins with' and a text input. A dropdown menu is open for the 'Department' field, showing options: 'begins with', 'contains', '=', 'not =', '<', '<=', and '>'. The 'contains' option is highlighted. There are checkboxes for 'Include History' and 'Correct History', and a 'Clear' button.

Notice you can search by Department number or Description.

Use the drop-down menu to change search criteria from “**begins with**” to “**contains**”.

You can also use wildcards in either of these fields (%).

Chartfield Values – Description Field

Navigation: Favorites | Main Menu | USC Conversion | USC Chartfield Mapping | ChartField Values | Worklist

Search: All | Search | Advanced Search | Add T

UNIVERSITY OF SOUTH CAROLINA

Department

Find an Existing Value ⊕ Add a New Value

Search Criteria

Enter any information you have and click Search. Leave fields blank for a list of all values.

Recent Searches: Choose from recent searches

Saved Searches: Choose from saved searches

*SetID: = USC01

Department: begins with

Description: contains animal

^ Show fewer options

Case Sensitive Include History Correct History

Search Clear Save Search

Search Results

3 results - SetID "USC01" Description "animal"

SetID	Department	Description	Manager Name	
USC01	220075	ANIMAL RESEARCH	(blank)	>
USC01	135858	PSYC ANIMAL CAGES	(blank)	>
USC01	962207	SMT PROVIDE ANIMALS WITH SHELTER	(blank)	>

For our example:

- Select “**contains**” in the description search field,
- Enter “**animal**” in the description search field.
- Select **Search** button.

Notice 3 values returned. You can drill down for more information on the department from this screen by selecting a result value.

Select **220075**.

Chartfield Values Key Information

Navigation: Favorites | Main Menu | USC Conversion | USC Chartfield Mapping | ChartField Values

University of South Carolina

SetID: USC01 | Department: 220075

Effective Date: 07/01/2017

*Effective Date: 07/01/2017

*Status: Active

*Description: ANIMAL RESEARCH

*Short Description: ANIMALRES

Manager ID: | Manager Name:

Attributes: Budgetary Only

Long Description: + -

Buttons: Save | Return to Search | Previous in List | Next in List | Notify | Add | Update/Display | Include History | Correct History

Key Information:

- Status
- Long and Short Description
- **Budgetary Only flag**

Budgetary only departments are not used in General Ledger transactions and are created to facilitate workflow and security in PeopleSoft HCM only.

Chartfield Values Job Aid



Office of the Controller
Operational Management & Reporting
Looking up ChartField Values in PeopleSoft Finance

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Each chartfield has a different screen containing additional information about the specific value.

A job aid is available on the Controller's Office website that walks you through each of the values and related screens of information.

The job aid can be found here:

[Chartfield Values Job Aid](#)



Demonstration

- Using the Chartfield Values in PeopleSoft Finance



Resources & Contacts



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Chart of Account Resources

- [Review the PeopleSoft Chart of Accounts](#)
- [Funding Sources Matrix](#)
- [ChartField Values Job Aid](#)
- [USC CoA Combos Inquiry](#)
- [USC CoA Combos Inquiry Page Job Aid](#)
- [General Ledger Queries and Job Aid](#)
- [Chartfield Request Form](#)
- [E Fund Questionnaire](#)
- [Custodial Fund Questionnaire](#)
- [Requesting New Chartfields Webinar Recording](#)
- [Requesting New Chartfields Presentation](#)
- [How to Use the Finance Intranet Demo Video](#)
- [How to Use the Finance Intranet Presentation](#)
- [Drilling Down into the Expenses/Payroll in the Grant Dashboard Job Aid](#)
- [How to use the GL Dashboard Report Job Aid](#)
- [How to use the GL Summary Report Job Aid](#)
- [How to use the GL Activity Report Job Aid](#)
- [How to use the Non-USCSP Project Dashboard Job Aid](#)
- [Using HCM Distribution in the Finance Intranet Job Aid](#)
- [Using HCM Distribution in the Finance Intranet Webinar Recording](#)
- [Using HCM Distribution in the Finance Intranet Presentation](#)
- [Earnings Summary Payroll Report Job Aid](#)



Office of the Controller

Office of the Controller

General Accounting

Accounts Payable

Capital Assets

Chart of Accounts

General Ledger

Moving and Relocation

Travel

Treasury Management

General Accounting Staff Directory

Grants and Funds Management

Compliance and Tax Management

Payroll Department

Operational Management and Reporting

External Financial Reporting and Transparency

Resource and Training Toolbox

Contact Us

Chart of Accounts

The Chart of Accounts is made up of unique chartfields used to store accounting information. Chartfields are used track budget and actual financial activity across the University system.

Expand all

PeopleSoft Chartfields +

Fund Numbers +

PeopleSoft Finance Chart of Accounts Inquiry +

Helpful Chartfield Related Queries +

Chartfield Maintenance +

Contact Us

For questions about the chart of accounts or organizational structure, please contact us directly:

1600 Hampton St., 6th Floor
Columbia, SC 29208

Email: cfmaint@mailbox.sc.edu

Where to Find More Resources

For chartfield maintenance resources, visit the [Chart of Accounts](#) page.



Office of the Controller

Office of the Controller

General Accounting

Grants and Funds Management

Compliance and Tax Management

Payroll Department

Operational Management and Reporting

External Financial Reporting and Transparency

Resource and Training Toolbox

Business Manager

Grant Administration

Principal Investigator

Policies & Procedures

Forms

Newsletters

PeopleSoft Finance Training Schedule

Listserves

Social Media

Contact Us

Business Manager

The role of each Business Manager at the University of South Carolina varies across each college and department. Each Business Manager handles several responsibilities that directly influence the success of their departments and the University overall. They provide business expertise on a variety of topics including, but not limited to budget, expenses, supplier onboarding, transaction corrections, and University policies and procedures.

Below is a list of tasks a Business Manager may be responsible for within their college/department. Sections include links to training resources that support each task.

Note: Each year the Controller's Office provides refresher trainings starting the month of February thru the end of April. Registration links for all scheduled trainings are sent to our BIZMANAGER listserv end of January, provided in our monthly newsletter, and in a prior week reminder email. On demand training can be found in the sections below.

Account Funding Change

Expand all



AP Uploads



Business Expense Prepaid Cards



Cash Advances



Cost Transfer



Departmental Deposits



Employee Reimbursement (Non-travel)



Endowments



Finance Intranet

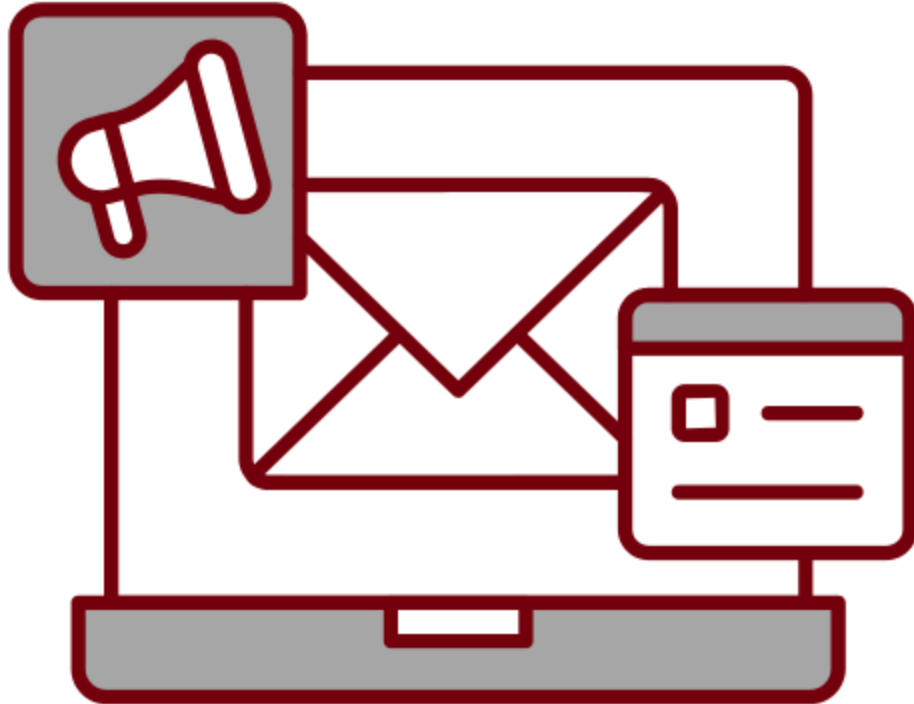


Where to Find the Resources

For general training resources, visit our [Business Manager](#) page.



Contact Us



For specific questions, please visit our [website](#) to find the appropriate contact.



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Questions



UNIVERSITY OF
South Carolina

THANK YOU!

Office of the Controller



Alone, we can do so little; together,
we can do so much.



Address:

1600 Hampton Street
Columbia, SC 29208



Contact Number:

Phone: 803-777-2602
Fax: 803-777-9586



Email Address:

controller@sc.edu



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