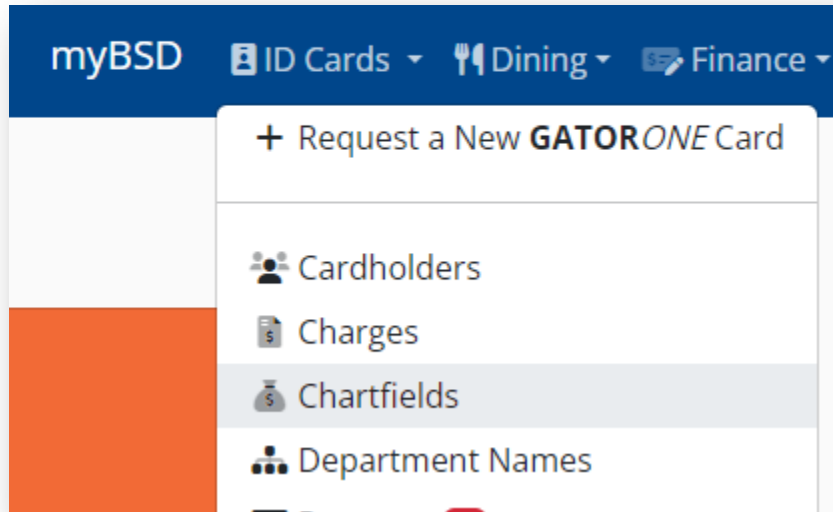


## How to Add Chartfields for Billing Purposes - Tutorial

To add chartfields in the portal, you'll need the following role: **UF\_N\_BSD\_DEPT\_FISCAL**. Your DSA will need to assign this role in PeopleSoft (takes overnight to update).

1. From the [Business Services portal](#), choose ID Cards, "Chartfield."



2. On the next screen, review the chartfields already in the system. You can sort the data by clicking any column header (ex. DeptID).
3. If you need to add a new chartfield, click the plus button in the blue "Chartfields" header field.

A screenshot of the myBSD Chartfields page. The top navigation bar is blue and contains the myBSD logo and several dropdown menus: ID Cards, Dining, Finance, Admin, Search, and Questions. Below the navigation bar is a green information banner with an 'i' icon and the text: "These are the chartfields available to your department's authorizers when paying for GATORONE Cards. Add chartfields here, and authorizers will be able to use them when approving card requests." Below the banner is a blue header for the "Chartfields" section, which includes a search box with the placeholder text "Type to filter Chartfields..." and a plus sign button circled in red. Below the header is a table with the following columns: OWNER, NAME, DEPTID, FUND, PROGR..., SOURCE, PROJECT, FLEX, ACCOUNT, BUDGE..., UFID, and ACTIVE. The first row of data shows: OWNER: BS-ID CARD OPERATIONS, NAME: ID Card, DEPTID: 68011000, FUND: 149, PROGR...: 9100, ACCOUNT: 793300, BUDGE...: CRRNT, and ACTIVE: a checkmark. A vertical "Column" label is visible on the right side of the table.

- The “Chartfields” form appears.  
Start by adding “Friendly name,” which will help you easily identify the chartfield during the card request process rather than using the PeopleSoft naming convention. ex. ID Card

**Add Chartfield**

Friendly Name

|

\*Department ID      \*Fund      \*Program

Required      Required      Required

Source      Project

Flex      Account

793300

Budget Reference      CRIS

Project Unit      Activity

Analysis      Res Type

Category      Sub-Category

UFID      Affiliation

Close      Save

- Select the correct Department ID from the dropdown menu.  
If you do not see the department you need, contact your DSA so they can add that department to your role in PeopleSoft.
- After you fill all the necessary fields, click the “Save” button.
- This will create a new record that will then become available to your departmental authorizers.