

Combination Code

A Combination Code is a 9 digit number created by General Accounting (GA) used solely in the Human Capital Management (HCM) module and represents the complete unique ChartField (CF) combination (cost center) for the General Ledger (GL) in PeopleSoft Financials (FI) module. Combination Codes are used to distribute all payroll charges such as salary and additional pay.

A Combination Code can represent any valid combination of required ChartFields (see Required ChartField by Fund at http://www.fa.ufl.edu/departments/general-accounting/chartfields/) with spending authority. Departments may also use optional CF's such as Flex, to track expenses for their own unique needs.

This instruction guide explains:

- How to determine if a Combination Code exists
- The creation of a new Combination Code

How to determine if a Combination Code exists

The following role is required to view Combination Codes:

- UF_KA_BUDGETING_INQUIRY
- or
- UF_KA_DEPT_BUDGETING_ADMIN (if processing distributions)

Navigation

Navigate through Nav Bar > Main Menu > Human Resources >Set Up HCM > Common Definitions > ChartField Configuration > Combination Code Table

Searching

- 1. Enter as many ChartField values as possible to narrow and expedite the search process.
- 2. Click the Search button to begin the search.
- Select desired search result record from bottom of screen. (See Figure 1).
 Note: If the search doesn't retrieve any records, you will receive the statement, "No matching values were found" in the Search Results area.



Combination Code Table																		
nter any information you have and click Search. Leave fields blank for a list of all values.																		
Find an Existing Value																		
Limit the number of results to (up to	o 300): 300																	
Set ID:	begins with 🔻		0															
Process Group:	begins with 🔻																	
GL Combination Code:	begins with 🔻																	
Description:	begins with 🔻													1				
Search Additional Chartfields	= •			•										l	2			
Account:	begins with 🔻																	
Department:	begins with 🔻 2930	00100																
Project:	begins with 🔻																	
CRIS:	begins with 🔻																	
Fund Code:	begins with 🔻 171																	
Program Code:	begins with 🔻																	
Source of Funds:	begins with 🔻 F006	6114																
Include History Case	Sensitive																	
Search Clear Basic	Search 🥳 Save Sea	arch Criteria																
Search Results																F 1		10 - 1
VIEW All														20		Firs	t 💽 1-2	of 2 D Last
Set ID Group GL Combination D. Code	escription Acc	count Department F	Project C	RIS Code	Program Code	<u>Class</u> Field	Affiliate	Source of Funds	Alternate Account	Budget Reference	<u>Dept</u> Flex	EmpIID	ChartField 3	Business Unit	<u>Activity</u>	Source Type	Category	Subcategory
UFLOR (blank) 0018696 2	9300100-171-2100 600	0000 29300100 (blank) (t	blank) 171	2100	(blank)	(blank)	F006114	(blank)	CRRNT	(blank)	(blank)	(blank)	(blank)	(blank)	(blank)	(blank)	(blank)
UFLOR (blank) 0030707 2	300100-171-6100 600	0000 29300100	blank) (t	blank) 171	<u>6100</u>	(<u>blank</u>)	(<u>blank</u>)	F006114	(blank)	CRRNT	(blank)	(<u>blank</u>)	(<u>blank</u>)	(<u>blank</u>)	(blank)	(blank)	(<u>blank</u>)	(blank)

Figure 1. Combination Code Table Search Form

There may be more than one Combination Code per ChartField combination. Since each Combination Code represents a unique combination of ChartFields, verify the appropriate combination to select the Combination Code.



Viewing Combination Codes

4. Note: The GL Combination Code listed immediately above the Combination Code Detail section.

If the status is inactive, please contact General Accounting for possible reactivation at GAhelp@ad.ufl.edu.

Combination Code Table										
Set ID:	UFLOR									
Process Group:										
GL Combination Code	:: 0030707									
Combination Code D	etail	Find View All First 🚺 1 of 1 🖸	La	st						
Effective Date:	04/28/2010	Status: Inactive								
Description:	29300100-171-6100									
Short Desc:	29300100	✓ Valid Value								
ChartField Detail										
Department :		29300100	-							
Fund Code :		171								
Program Code :		6100								
Account:		600000								
Source of Funds :		F006114								
Budget Reference :		CRRNT								
Dept Flex :			Е							
EmplID :										
DC Rusinoss Unit										

Figure 2. Combination Code Table

The full ChartField combination represented by the Combination Code is listed in the ChartField Details section.

Creation of a new Combination Code

Funds 201 and 209

Combination Codes for Funds 201 and 209 do not need to be requested manually. General Accounting will create Combination Codes for Projects within two business days of the Notice of Budget Release for the appropriate budget items. If a Combination Code for Funds 201 or 209 needs to be created with an optional ChartField or if a Combination Code is not available after three days the department should send the request directly to their Research Administrator in Contracts and Grants. Visit <u>http://www.cg.cfo.ufl.edu/</u> for contact information. Combination Codes for grant projects are effective dated using the project start date.

For the following funds, the department can submit Combination Code requests directly to the contacts indicated on the request form.

All Grant Funds for 201				
Cash Funds 211-212	Engineering	Depts 19XXXXX	Contact Jon Frum	jfrum@eng.ufl.edu
Cash Funds 211-212	IFAS	Depts 60XXXXX	Contact Juli Carter	jare@ufl.edu
Cash Funds 211	All Other Departments		Research Service Center	idc@research.ufl.edu
Cash Funds 212&214	All Departments		Contact C&G Research	Administrator
Cash Funds 213	All Departments		Contact Suzanne Winik	<u>swinik@ufl.edu</u>
All DOCE (Fund 143) a	bbennet@ufl.edu			
Requests with budget r	budgethelp@ad.ufl.edu			
Fund 275 requests req	budgethelp@ad.ufl.edu			



All Grant Funds for 20	1 & 209 requir	e approval of the Re	search Administrator.		
Cash Funds 211-212	Engineering	Depts 19XXXXXX	Contact Jon Frum	frummengufledu	* UFID: the
Cash Funds 211-212	IFAS	Depts 60XXXXXX	Contact Juli Carter	a re @ufi.e du	requester).
Cash Funds 211	All Other De	partments	Research Service Center	tic@research.ufl.edu	** Effective
Cash Funds 212&214	All Departme	ents	Contact C&G Research Admi		
Cash Funds 213	All Departme	ents	Contact Suzanne Winik	swinik @ufi.edu	
All DOCE (Fund 143)	are approved	bbennett@ufLedu or ckoeni	o <u>go d ce.ufil e</u> du		
Requests with budget	reference of C	ckolb@ufl.edu			
Fund 275 requests rec	quire George k		gkolb@ufi.edu		

All other Funds:

Once you have verified that a Combination Code does not exist, please complete the Combination Code Request form and send it to your ChartField Liaison for submission to General Accounting. All ChartFields must have available budget so that once the Combination Code is assigned, the ChartField will not create a payroll exception or a negative balance. Requests for Combination Codes submitted to the ChartField email address are uploaded no later than the next business day, but usually entered the same day. Combination Codes are effective dated as of the beginning of the fiscal year.

To determine your ChartField Liaison

- 1. Visit the Finance and Accounting forms website (<u>http://www.fa.ufl.edu/forms-and-publications/forms/</u>).
- 2. Select the General Accounting department link.
- 3. Click the CF Liaisons link. (See Figure 3.)



Figure 3. ChartField Liaisons spreadsheet link

- 4. Click the Open option to open CF-Liaisons.xlsx spreadsheet.
- 5. Locate your college/unit to determine your assigned ChartField Liaison's name and email.



Completing the Combination Code Request Form

Note: Some departments may require just the departmental ChartField Liaison complete the Combination Code Request Form. Please verify departmental policy and procedure with your ChartField Liaison prior to completing the Combination Code Request Form.

- 1. Complete steps 1 & 2 above.
- 2. Click the Combination Code Request link. (See Figure 4.)

General Accounting									
Agency Chartfield Authorization									
DeptFlex Request	Click the Combination Code (HRAC)								
DeptID Request	Code Request Form								
Combination Code (HRAC) Request									
CF Liaisons									
Request to Operate an Educational Busin	ess Activity (Auxilary)								
Excel Calc Sheet									
 UFLOR General Ledger (Actuals) Journal 	Entry Template								
 General Ledger (Actuals) Journal Upload \ JEMACRO2 files required) 	Workbook (JEMACRO1 and								
General Ledger (Actuals) Compiled Macro	Sheet (JEMACRO1)								
General Ledger (Actuals) Compiled Macro Sheet (JEMACRO2)									
Figure 4. Combination Code Request Form									

- 3. Click the Open option to open the Combination Code (HRAC) Request Form.
- 4. Verify the Combination Code Request tab (2nd tab) is active at bottom of screen.

19	8						
20	9						
14		Example of Requre	d Fields	Combination C	ode (HRAC)		

Figure 5. Combination Code Request tab

Note: The first tab, Example of Required Fields, shows the ChartFields required per each Ledger/Fund.



- 5. Complete the form as directed.
- 6. Save the completed Combination Code (HRAC) Request form to a desired location on your computer.
- 7. Email the completed form as an attachment to your ChartField Liaison or designated contact with "Combination Code Request" in the subject line.

Date of	f request:													
Chartfi	eld Liaison:													
Dept C	ontact:				All Cor	All Combination Code (HRAC) requests received by 3:30pm will be created the next business day.								
Dept C	ontact Email:													
College	e or Unit:													
		DO NOT	delete, add	or move co	lumns (you ma	ay add/delete rows)								
		General /	Accounting V	Vebsite:	http://www.fa.ut	fl.edu/departments/genera	al-accounting/							
		Instruction	n Guide:		http://hr.ufl.edu	/training/myUFL/instruction	onguides/Human%20R	esource%20	Account%	20Codes.pdf				
		Note:	All Grant Fu	unds for 20	1 & 209 requir	re approval of the Res	search Administrate	or.						
	Cash Funds 211-212		Engineering	Depts 19XXXXXX	Contact Jon Frum			jfrum@eng.ufl.edu						
					IFAS	Depts 60XXXXXX	Contact Juli Carte	r		jare@ufl.edu				
			All Other Dep	partments	Contact Suzanne Wink			mailto: <swinik< td=""><td>@UFL.EDU></td><td></td><td></td><td></td></swinik<>	@UFL.EDU>					
			Cash Fund	s 213-214	All Departme	ents	Contact Suzanne Wink			mailto: <swinik@ufl.edu></swinik@ufl.edu>				
			AII DOCE (Fund 143)	are approved by Charles Koe					mailto: <ckoenig@dce.ufl.edu></ckoenig@dce.ufl.edu>				
			Requests w	vith budget	reference of C	CYFWD require Sheri	Austin's Approval			mailto: <sheri@< td=""><td>Qufl.edu></td><td></td><td></td><td></td></sheri@<>	Qufl.edu>			
Combi	nation Code (H	IRAC) Red	quest	ChartField	d examples by	Fund can be found o	n the other tab.							
													With shire to a	Creat
										DCD :			will this be	Grant
	D			0 1 1	0.05	D. 1 . D. 6	D		ODIO	PC Business			used in a Prior	Beginning
Line	DeptID	Fund	Program	(Blank)	SOF	Budget Ket	Deptilex	UFID	CRIS	Unit	Project	Activity	Year?	Date.
1														
1		1		1	1	1	1		1	1	1	1	1	1

Figure 6. Combination Code (HRAC) Request Form

Effective Dated Combination Codes

Combination Codes will be effective dated. This means for Grant Funds, the Combination Codes are effective dated. This means for Grant Funds, the Combination Codes will be effective dated at the beginning of the Grant. For all other Funds the effective date will default to the beginning of the fiscal year (07/01/20##). If a Combination Code on a Cash Based Fund is needed for prior year retros, use the beginning of the prior fiscal year as the effective date.

If you need help contact --General Accounting 392-1326 or gahelp@ad.ufl.edu.

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