Within the CTR Portal, chart strings are assigned at the Service Line level, allowing for the ability to have the funding for a given project applied to different chart strings based on the nature of the support provided. In addition to allowing for different sources of funding for per Service Line, the ability to have multiple funding sources per Service Line also exists. The material below illustrates:

- Adding chart strings to a project
- Adding chart strings to an invoice
- Using multiple chart strings to pay for the charges of one service line

Individuals with the roles of Accountant, Invoice Contact, and Principle Investigator on a project will have the ability to perform these tasks.

Adding chart strings to a project:

Important information prior to starting to add a chart string:

- Ensure that the budget for the expense account exists for the current budget period. If the entire chart string (including expense account) is not active in EFS, the chart string will not be saved.
- If an error message “Unable to locate this sponsored account or expense account 7xxxxx is not setup” or “No budget has been created for fiscal year 2xxx for this non-sponsored account” is received, please proceed with rebudgeting within EFS before returning to add the chart string. If you would like to save the chart string information in the project record for reference by others, please add to the Notes section on the Basic Information tab.
- In order for the chart string to be used for an invoice, it will need to be added in the Service Line.

1. In the Project Record there should be four tabs available
2. Select the Service Line tab
3. Locate the service line for which a chart string needs to be added.
4. In the EFS Chart String section click the Add button; the Add EFS chart string window will open.

5. The following fields are required.
   a. Fund
   b. Dept ID
   c. Program and/or Project

6. Once the chart string has been entered, click the Save button; the system will validate the chart string against EFS records.

7. The chart string now shows under the EFS Chart Strings section of the service line.

Editing a chart string:
1. Once associated with a service line, a chart string can be edited by clicking the Edit button.
2. Make edits in the Edit Chart String window and select Save.

Adding chart strings to an invoice:
1. Search for the invoice under My Invoices and open it.
2. On the invoice, scroll down to the service line that needs a chart string added or changed.
3. At the end of the service line name will be an icon.  Click this icon to open the Edit window.

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4. The Edit window will allow you to select the same chart string for all lines or select different chart strings for each line. If a chart string does not appear in the EFS drop down list, follow the instructions for adding a chart string to a project.
   a. The same chart string for all lines:
      i. On the header, use the drop down under the EFS Column.
      ii. Select the chart string. This chart string will populated to all lines.
      iii. Click Save
   b. Different chart strings for each line:
      i. Each line will have a drop down field. Use this field to select a chart string for each line.
      ii. Once all lines have a chart string added, click Save.

5. Upon save, the chart string(s) will be displayed at the bottom of the service line in place of the phrase “No chartstrings have been setup for this service line.”

Using multiple chart strings to pay for the charges of one service line
1. Access the project record through My Projects.
2. Select the Service Line tab.
3. Locate the service line for which multiple chart strings will be used.
4. In the “EFS Chart Strings” area identify which chart strings to use.
5. The last column of the “EFS Chart Strings” section is the “Inv %” field. The values here represent the percentage of the invoice total to be charged to the corresponding chart string.
   a. When only one chart string is present, the percentage defaults to 100%; the addition of subsequent chart strings will result in the new chart strings defaulting to 0%.

The use of two chart strings used for payment of the service line charges.

6. To change the percentage charged to each chart string, change the value in the Inv % column for both chart strings to the percent that should be charged.
   NOTE: The total percentage must add up to 100% in order to save the changes.

7. After editing, select the Update button to save the changes.
   a. A green bar indicating “Invoice Percentages Saved!” will display for a few moments upon updating, to indicate that the changes did save.