

February 11, 2025

# UCSB Financial Management Modernization

## Common Chart of Accounts (CCOA) Training

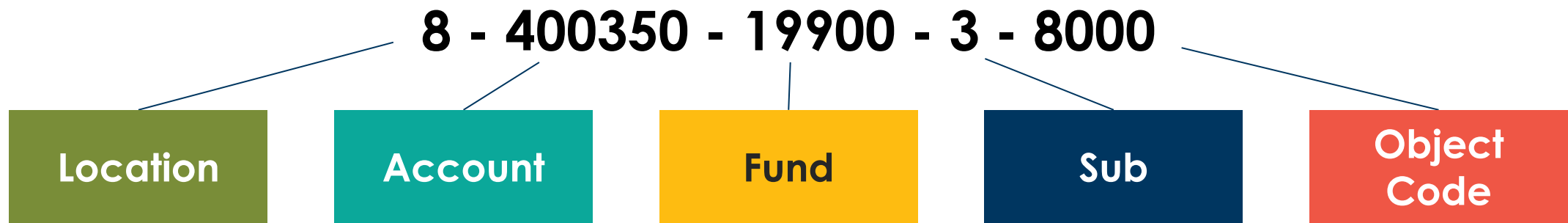
# Agenda

- Current Chart of Accounts
- New Common Chart of Accounts
- CCOA Explorer Tool
- CCOA Request Form
- Resources

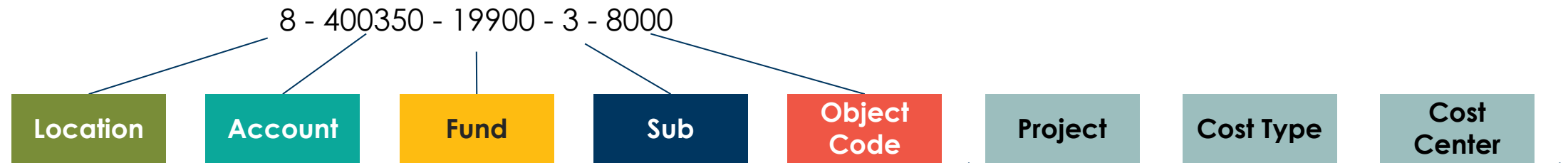
# Current Chart of Accounts

# UCSB Full Accounting Unit (FAU)

UCSB currently uses 17 digits to identify the sources and uses of funds:



# Department Fields (optional)



- **Project** = 6 alphanumeric characters
- **Cost Center** = 4 alphanumeric characters
- **Cost Type** = 5 alphanumeric characters

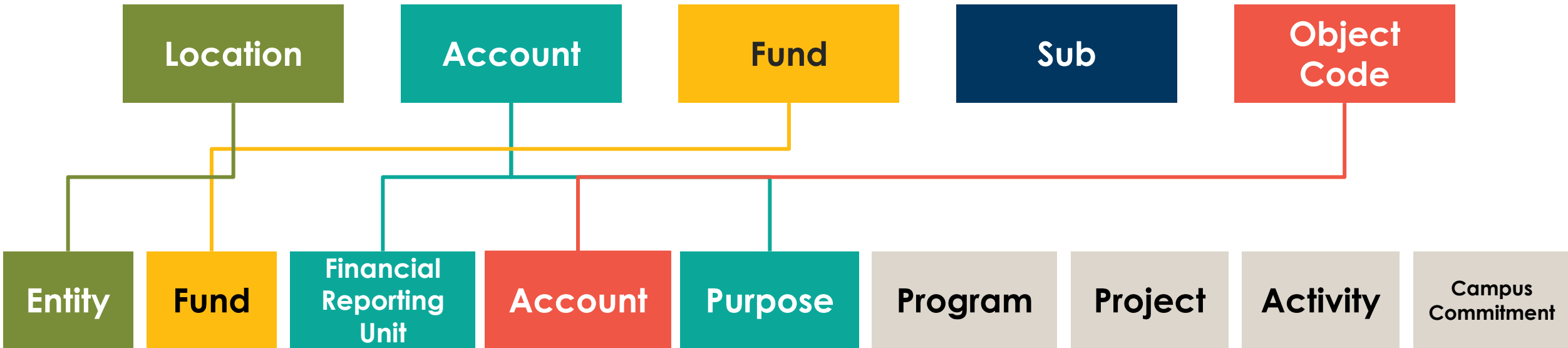
At this time, departments have discretion on how to use these fields.

They are established through the Gateway Management Console (GMC).

# Common Chart of Accounts

# Current vs. Common Chart of Accounts

## Current Chart of Accounts



## Common Chart of Accounts

# Old Segment: LOCATION

## New Segment: ENTITY

Entity	Fund	Financial Reporting Unit	Account	Purpose	Program	Project	Activity	Campus Commitment
1811	19900	2413001	523201	40	New	From PGM	New	New

- Identifies the organizational unit (campus) within the UC System and assigned by UC Office of the President
- UCSB has 3 Entity Codes:
  - **1811** - UC Santa Barbara Campus (Loc = 8)
  - **1831** - UCSB Agricultural and Natural Resources (Loc = 8)
  - **1841** - UCSB-UCOP (Loc = Q)



# Old Segment: ACCOUNT

## New Segment: FINANCIAL REPORTING UNIT (FRU)

Entity	Fund	Financial Reporting Unit	Account	Purpose	Program	Project	Activity	Campus Commitment
1811	19900	2413001	523201	40	New	From PGM	New	New

- FRUs are organized in a hierarchy tree rolling up to department, college and division similar to the current control-point hierarchy
- FRUs represent the business or functional/budgetary unit responsible for or affected by the transaction
- Organizational departments identified by a current DEPTID (Home Dept) may have one or more FRUs

- **1130001** - Baseball
- **2901001** - College of Creative Studies
- **2606001** - Electrical & Computer Engineering

# Old Segment: FUND

## New Segment: FUND

Entity	Fund	Financial Reporting Unit	Account	Purpose	Program	Project	Activity	Campus Commitment
1811	19900	2413001	523201	40	New	From PGM	New	New

- The first digit of the FUND number specifies the type of fund
  - 1 - Unrestricted
  - 2 - Restricted Expendable
  - 3 - Restricted Un-expendable
  - 4 - Capital Assets, Net of Related Debt
  - 5 - Agency
- Sponsored projects will generally use high level fund values that are not specific to each award.
- Gifts will continue to be identified with a unique fund number, unless it is an unrestricted gift with various donors.

# Old Segment: SUB

## New Segment: NONE

Entity	Fund	Financial Reporting Unit	Account	Purpose	Program	Project	Activity	Campus Commitment
1811	19900	2413001	523201	40	New	From PGM	New	New

### Sub:

- In the current Chart, Sub is used as a means to roll up object codes and provide a way to categorize expenses.
- In the new CCOA, Account will have a hierarchy that will provide similar information.

# Old Segment: OBJECT CODE

## New Segment: ACCOUNT

Entity	Fund	Financial Reporting Unit	Account	Purpose	Program	Project	Activity	Campus Commitment
1811	19900	2413001	523201	40	New	From PGM	New	New

- **Account** classifies the **expense** similar to the current object code and will roll up to specific categories such as “Salaries & Wages”
- The first digit of the Account specifies the whether the Account is an:
  - 1 - Asset
  - 2 - Liability
  - 3 - Equity
  - 4 - Revenue
  - 5 - Expense

### Examples

- 400001 = Tuition - Undergraduate
- 522205 = General Office Supplies
- 522402 = Lab Instruments and Supplies

# Old Segment: OBJECT CODE

## New Segment: ACCOUNT

Entity	Fund	Financial Reporting Unit	Account	Purpose	Program	Project	Activity	Campus Commitment
1811	19900	2413001	523201	40	New	From PGM	New	New

### Account Hierarchy:

- ⊖ 50000A-Salaries and wages
  - ⊖ 50000B-Academic salaries and wages
    - ⊖ 50000C-Academic salaries and wages
      - ⊖ 50000D-Academic salaries and wages
        - ⊖ 500001-Academic salaries and wages
        - ⊖ 500002-Sabbatical Leave-In Residence
        - ⊖ 500003-Sabbatical Leave-Not In Resid
  - ⊖ 50100B-Non-academic salaries and wages

- ⊖ 53600D-Travel and transit
  - ⊖ 536001-Travel-California
  - ⊖ 536002-Travel-Participant Support
  - ⊖ 536003-Travel-Domestic Out Of State
  - ⊖ 536004-Travel-Foreign

- ⊖ 53420D-Telecommunications
  - ⊖ 534201-Telecommunication Charges
  - ⊖ 534202-Toll Calls
  - ⊖ 534203-Other Data Charges
  - ⊖ 534204-Cellular Telephone Charges
  - ⊖ 534205-Cable Television

# Old Segment: FUNCTION CODE (Part of Account #) New Segment: PURPOSE

Entity	Fund	Financial Reporting Unit	Account	Purpose	Program	Project	Activity	Campus Commitment
1811	19900	2413001	523201	40	New	From PGM	New	New

## Purpose:

- Classifies the institutional purpose of an *expenditure*; not used on revenue transactions.
- Tells “why” an expense was incurred, rather than “what” was purchased.
- Based on NACUBO Function Numbers

# Old Segment: FUNCTION CODE (Part of Account #)

## New Segment: PURPOSE

40	Instruction	64	Operation and Maintenance of Plant
41	Summer Session	65	Depreciation
43	Academic Support	68	Student Services
44	Research	72	Institutional Support & General Administration
60	Libraries	76	Auxiliary Enterprises
61	University Extension	78	Student Financial Aid
62	Public Service		

# Old Segment: NONE

## New Segment: PROGRAM

Entity	Fund	Financial Reporting Unit	Account	Purpose	Program	Project	Activity	Campus Commitment
1811	19900	2413001	523201	40	New	From PGM	New	New

### Program:

- Enables roll-up reporting of transactions related to a pre-defined, formal UCOP or cross-campus program or initiative.

#### *Examples*

- 101 - Natural Reserve System (NRS)
- 176 - UC Observatories (UCO)
- A01 - UCSB Campus Commencement



# Old Segment: PROJECT

## New Segment: PROJECT

Entity	Fund	Financial Reporting Unit	Account	Purpose	Program	Project	Activity	Campus Commitment
1811	19900	2413001	523201	40	New	From PGM	New	New

### Project Criteria:

Externally funded by an award notification or other agreement made through the Office of Research (i.e. Sponsored Project, a policy-defined activity)

Funding allocated to a Senate faculty member that requires dashboard level reporting and recurring transactional approval from PMs and PIs

One of the following:

- A) Capitalizable
- B) Construction project
- C) Feasibility study managed by FM or D&CS

# Old Segment: PROJECT

## New Segment: PROJECT

### Project Criteria continued:

Body of work defined for a period of time during which there will be a significant number of transactions, **plus** one of the following:

- A) Multi-fiscal year Inception-to-Date reporting required
- B) Internal reporting needs are not met by referencing another CCOA segment value

# Old Segment: NONE

## New Segment: ACTIVITY

Entity	Fund	Financial Reporting Unit	Account	Purpose	Program	Project	Activity	Campus Commitment
1811	19900	2413001	523201	40	New	From PGM	New	New

### Activity:

- Classifies transactions of a recurring nature, such as recurring program-related activities, recurring conferences, recharge service lines, course and material service fees, and other recurring fees.
- Departments may use generic ACTIVITY values in combination with their FRU or they may request a specific ACTIVITY value.

# OLD SEGMENT: NONE

## NEW SEGMENT: CAMPUS COMMITMENT

Entity	Fund	Financial Reporting Unit	Account	Purpose	Program	Project	Activity	Campus Commitment
1811	19900	2413001	523201	40	New	From PGM	New	New

### Campus Commitment:

- Used by the Chancellor, EVC, Vice Chancellor areas, Divisions, Deans or multi-units to tag funds for a particular funding commitment to a different campus unit.
- It will also allow tracking actual expenditures against a campus commitment when using the segment value to identify an expense.

**Putting it all Together**

# Common Chart of Accounts - FRU Hierarchy

The organization tree has 7 levels; may also be referred to as 'organizational node'

**Level 1** = Campus

**Level 2** = Vice Chancellor/Chancellor Direct Report

**Level 3** = Colleges/Division

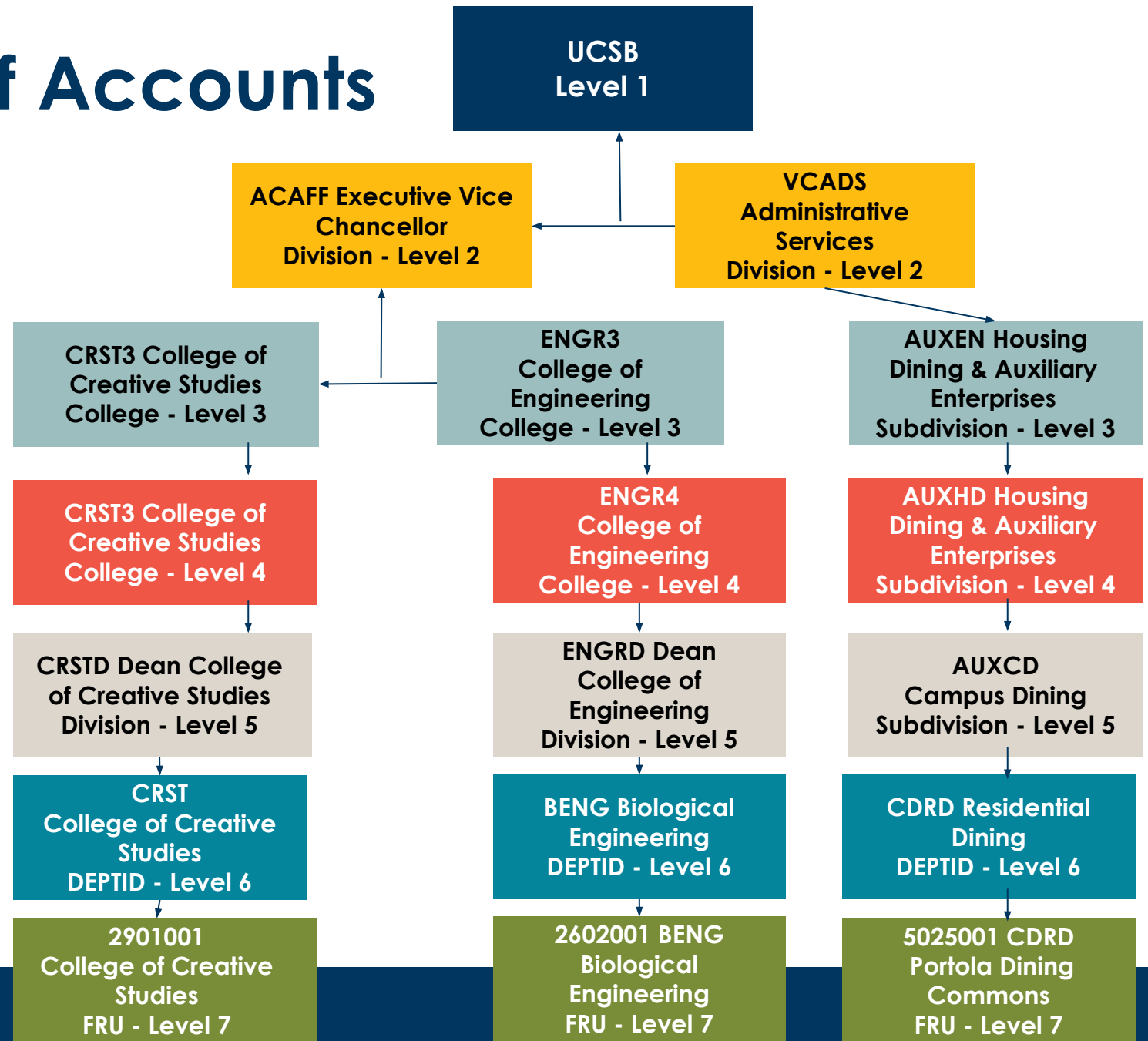
**Level 4** = Sub-division, college, schools (1)

**Level 5** = Sub-division, college, schools (2)

**Level 6** = DEPT ID - Will be used as UC Path Home Dept

**Level 7** = Financial Reporting Unit (FRU)

# Common Chart of Accounts FRU Hierarchy



# Scenario #1

An employee in the Admissions department needs to purchase a new laptop; funding provided by State General Funds for their departmental operating funds:

## Common Chart of Accounts

Entity	Fund	Financial Reporting Unit	Account	Purpose	Program	Project	Activity	Campus Commitment
1811	19900	7002008	523209	68				
Always 1811	State General Fund	ADMS - Admissions: Guardian Scholars	Computer Equip & Network <\$5K	Student Services	Not Needed in this transaction			



# Scenario #2

An employee in the History department needs to be reimbursed for providing snacks at a two-day faculty retreat (one-time) to discuss curriculum changes; funding provided by discretionary departmental gift funds.

## Common Chart of Accounts

Entity	Fund	Financial Reporting Unit	Account	Purpose	Program	Project	Activity	Campus Commitment
1811	62363	2318001	536501	40				
Always 1811	Various Donors	HIST - History	Business Meeting Expense	Instruction	Not Needed in this transaction			

# Scenario #3

The Computer Science department will pay transportation, lodging, and meals for invited prospective graduate students to visit campus. Because this is an ongoing activity the department wishes to track across multiple years, an Activity Code is used when recording the expenses.

## Common Chart of Accounts

Entity	Fund	Financial Reporting Unit	Account	Purpose	Program	Project	Activity	Campus Commitment
1811	10201	2605001	536001	40			101001	
Always 1811	Educ. Fund	Computer Science	Travel	Instruction	Not Needed in this transaction		Prog. Activity	Not Needed in this transaction

# Scenario #4

The Earth Science Department administers the Robert Norris Brunton Award to the best students in the introductory field class. Due to the specific nature of the fund, an activity code is not needed in this case.

## Common Chart of Accounts

Entity	Fund	Financial Reporting Unit	Account	Purpose	Program	Project	Activity	Campus Commitment
1811	61703	2407001	530111	78				
Always 1811	Brunton Award	ERSC - Earth Science	Student Prizes/Awards	Student Financial Aid	Not Needed in this transaction			

# Summary of Changes

# CCOA Structure: Summary

- **FRU Hierarchy**
  - Departments may have many DEPTIDs (home dept codes)
  - Each DEPTID may have one or more **FRU**'s
- **Purpose**
  - New segment, which identifies the **WHY** an expenses was incurred, rather than what was purchased.
- **Sub**
  - Will not be a segment in the Common Chart of Accounts.
- **CCOA Account**
  - Replaces the Object Code and will allow for a hierarchy of reporting with summarized categories.

# CCOA Structure: Summary

- **Project**

- Projects will be assigned by the Project and Grant Management (PGM) module if they meet specific [criteria](#).

- **Program and Campus Commitment**

- Values are used for tracking budgetary and transactional activity for consolidated reporting. Systemwide programs will be established centrally by UCOP.

- **Activity**

- Used to track recurring activities; departments may request new Activity codes.

# Resources

# CCOA Explorer Tool

## Power BI Report: CCOA Explorer Tool

- Videos:
  - Accessing Power BI and the CCOA Explorer Tool
  - Navigating Power BI
  - Understanding the FRU Hierarchy Report



# CCOA Explorer Tool - Power BI Report

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Name	Type	Opened	Location	Endorsement	Sensitivity
CCOA Explorer	App	4 days ago	Apps	—	—
Campus UCPath Reporting	App	28 days ago	Apps	—	—
Legacy Financial Reporting	App	3 months ago	Apps	—	—

Power BI

# CCOA Explorer Tool - Home Page

CCOA Explorer | Data updated 2/4/25

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UC SANTA BARBARA About the CCOA Explorer Extract as of 2/4/2025 12:30:55 PM

### Welcome to Common Chart of Accounts (CCOA) Explorer

This tool is intended to allow reviewing of the Common Chart of Accounts (CCOA) structure. These views provide the new structure as well as the mapping of the legacy chartfields to the CCOA chartfields. *Hierarchy* (tree) pages allow drilling down through the structure of the chart. *Lookup* pages provide list views of the chartfields and their attributes. Use the slicers on the left to filter by legacy fields. Use slicers on the top to filter by CCOA fields. This tool does not present financial data, only the structure of the Chart of Accounts. Click on the **PowerBI Tips** link on the left to learn more about how to use PowerBI and recent updates.

Use the **Entity** page to see the new Entity codes which replace the legacy Location code. Most departments will use Entity 1811.

Use the **★ Fund Lookup** page to find the mapping of legacy Funds to the new CCOA Funds or CCOA Funds back to legacy Funds. Note that some funds, such as 19900 have the same old and new Fund number. Use the **Fund Hierarchy** page to understand the overall Fund structure and see how legacy funds fit into the new structure.

Use the **★ Account to FRU Lookup** page to find the mapping of legacy Expense or Revenue Accounts to the new CCOA FRU (Financial Reporting Unit), and see what legacy accounts were mapped to CCOA FRUs. Use the **FRU Hierarchy** page to see the FRUs belonging to a Department, and see the overall FRU reporting structure, which is similar to the legacy "Control Point Hierarchy".

Use the **★ Object Code to Account** page to find the mapping of legacy Expense Object Codes to the new CCOA Expense Accounts. Use the **Account Hierarchy** page to see the structure and categories of CCOA Accounts, including Expense Account categories. Departments will be primarily interested in the Expense Account group. Use the **Account Lookup** page to find the mapping of legacy Asset, Liability, Fund Balance and Revenue Accounts. Expense Accounts are not displayed here.

Use the **Purpose** page to see the new CCOA Purpose codes which must be coded with all Expense transactions. These are often the same as the first 2 digits of the legacy Expense Account number.

Use the **Program** page to see the new CCOA Program codes. This is a new chartfield. Some legacy LAFS combinations map to new UC-Wide Program codes. There are currently no mappings for campus programs. Use the **Program Hierarchy** to see the categories of the defined Program codes. There are both campus specific and UC-wide Program codes.

Use the **★ Project Lookup** page to find the new CCOA PGM Projects and see the legacy Account-Fund-Project codes which are mapped to new Projects. Use the **Project Hierarchy** page to see the categories of CCOA Projects and the Projects in each category.

Use the **Activity Lookup** page to see the new CCOA Activity codes. This is a new chartfield and there are currently no mappings from legacy values to Activity. Use the **Activity Hierarchy** to see the groupings of Activity codes.

The **Advanced Lookup** page is primarily for use by central offices to see the mappings for Balance Sheet (Asset, Liability, Fund Balance) and Revenue Accounts. The **Transaction Code Lookup** is primarily for use by central offices to find the mappings for Transaction Codes which are used on Fund Balance Accounts only.

### CCOA Structure

Entity	Fund	FRU	Account	Purpose	Program	Project	Activity	Commitment
(4)	(5)	(7)	(6)	(2)	(3)	(7)	(6)	(5)

# CCOA Explorer Tool - FRU Hierarchy

**CCOA Explorer** | Data updated 2/4/25

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## UC SANTA BARBARA

### Financial Reporting Unit (FRU)

**CCOA FRU Hierarchy**: ACAFF-Executive Vice Chancellor  
**CCOA FRU Deptid Level 6**: All  
**CCOA FRU**: All  
**CCOA Department Type**: All  
**Active**: Y

**Legacy Account**: All  
**Legacy Department**: ARTS-Department of Art  
**Legacy Account Type**: All

Legacy Expense and Revenue Account numbers map to the Financial Reporting Unit (FRU). Use the Account to FRU Lookup screen for that mapping.

Numeric (bottom level) FRUs are assigned to a 4-letter Department code which in many cases is the same as the legacy department code.

**Tip:** When filtering, right click top row of hierarchy and click "Expand > All" to automatically expand to display selections.

### Financial Reporting Unit (FRU)

- ACAFF-Executive Vice Chancellor
  - LTSC3-College of Letters & Science -3
    - HUFA4-Division of Humanities & Fine Arts
      - AASCT-Arts Admin Support Center-AASC
        - ARTS-Department of Art
          - 2305001-ARTS Department of Art** (Level 7 FRU)
            - [220034-Art-Course Material Fee]
            - [260040-Department Of Art Income]
            - [403602-Art Studio Supplemental Acct]
            - [404002-Department Of Art]
            - [404602-Arts-Ta Reader]
            - [624403-Dept Of Art - Public Service]
            - [783102-Prizes & Awards-Dept Of Art]
            - [784102-Student Aid-Department Of Art]
            - [784105-Misc Student Aid-Dept Of Art]
            - [784130-Misc Std Aid - Art Department]
            - [784146-Student Aid-Department Of Art]
          - 2305002-ARTS Sponsored Research
            - [444002-Department Of Art Research]
          - 2305003-ARTS Faculty Funds + Other Assigned
            - [403702-Dep Of Art-Faculty Startup&Ret]
            - [407102-Mg2005102-Arts-Fulbeck]
            - [407131-Dept Of Art-Krueger Minigrant]
            - [407255-Dep Of Art-Mulfinger-Minigrant]
            - [407317-Dept Of Art-Yasuda Minigrant]
            - [407393-Mg2004136-Arts-Callister]
            - [407459-lig2004203-Arts-Callister]
            - [407478-lig2004223-Arts-Yasuda]
            - [407499-Dep Of Art-Vanderpool-Ta Instr]
            - [407510-Tad2005302-Arts-Fulbeck]

Level 7 FRU

Legacy Accounts

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# CCOA Explorer Tool - Account to FRU Lookup

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UC SANTA BARBARA Legacy Account to Financial Reporting Unit (FRU) Lookup

CCOA FRU Hierarchy: ACAFF-Executive Vice Chancellor

CCOA FRU Deptid Level 6: All

CCOA FRU: All

CCOA Department Type: All

Active: Y

Legacy Account Type: All

Legacy Account: All

Legacy Department: All

Use this page to find the new Financial Reporting Unit (FRU) for a legacy Revenue or Expense Account.

Some new FRUs were added which do not have a legacy account. These can be found in the FRU Hierarchy for the new Department (Level 6 FRU).

Legacy Dept	Legacy Account-Title	Legacy Fund Title	FRU Title	Dept Type	Active
ARTM	267219-Arch, Des&Art Museum Royalties		2304001-ARTM Art Museum	GC01	Y
ARTM	267334-Memberships Parking Passes		2304001-ARTM Art Museum	GC01	Y
ARTM	404004-Art Museum-Instruction		2304001-ARTM Art Museum	GC01	Y
ARTM	444004-Art Museum Research		2304002-ARTM Sponsored Research	GC90	Y
ARTM	484004-Art Museum Res-Fed Contracts		2304002-ARTM Sponsored Research	GC90	Y
ARTM	597055-Art Museum Mexus		2304002-ARTM Sponsored Research	GC90	Y
ARTM	597056-Art Museum Chicano Studies		2304001-ARTM Art Museum	GC01	Y
ARTM	620430-Art Exhibits		2304001-ARTM Art Museum	GC01	Y
ARTM	624402-Art Museum Public Service		2304001-ARTM Art Museum	GC01	Y
ARTM	784104-Student Aid-Art Museum		2304001-ARTM Art Museum	GC01	Y
ARTS	220034-Art-Course Material Fee		2305001-ARTS Department of Art	GC90	Y
ARTS	260040-Department Of Art Income		2305001-ARTS Department of Art	GC90	Y
ARTS	403602-Art Studio Supplemental Acct		2305001-ARTS Department of Art	GC90	Y
ARTS	403702-Dep Of Art-Faculty Startup&Ret		2305003-ARTS Faculty Funds + Other Assigned	GC90	Y
ARTS	404002-Department Of Art		2305001-ARTS Department of Art	GC90	Y
ARTS	404602-Arts-Ta Reader		2305001-ARTS Department of Art	GC90	Y
ARTS	407102-Mg2005102-Arts-Fulbeck		2305003-ARTS Faculty Funds + Other Assigned	GC90	Y
ARTS	407131-Dept Of Art-Krueger Minigrant		2305003-ARTS Faculty Funds + Other Assigned	GC90	Y
ARTS	407255-Dep Of Art-Mulfinger-Minigrant		2305003-ARTS Faculty Funds + Other Assigned	GC90	Y
ARTS	407317-Dept Of Art-Yasuda Minigrant		2305003-ARTS Faculty Funds + Other Assigned	GC90	Y
ARTS	407393-Mg2004136-Arts-Callister		2305003-ARTS Faculty Funds + Other Assigned	GC90	Y
ARTS	407459-lig2004203-Arts-Callister		2305003-ARTS Faculty Funds + Other Assigned	GC90	Y
ARTS	407478-lig2004223-Arts-Yasuda		2305003-ARTS Faculty Funds + Other Assigned	GC90	Y
ARTS	407499-Dep Of Art-Vanderpool-Ta Instr		2305003-ARTS Faculty Funds + Other Assigned	GC90	Y
ARTS	407510-Tad2005302-Arts-Fulbeck		2305003-ARTS Faculty Funds + Other Assigned	GC90	Y
ARTS	407529-Dept Of Art - Reese Minigrant		2305003-ARTS Faculty Funds + Other Assigned	GC90	Y
ARTS	407531-Dept Of Art - Carson Minigrant		2305003-ARTS Faculty Funds + Other Assigned	GC90	Y

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# CCOA Request Form

The Request Form can be used if a department wants to:

- Add a FRU, Fund, Account, or Activity
- Change a FRU
- Inactivate a FRU

\*Note, if a current/legacy account has activity within the last 2 years, it needs to be mapped to a FRU.

# CCOA Request Form



## CCOA Request Form

To help us fulfill your request, please complete this form with as much detail as possible.

This form is used to request changes to the Common Chart of Accounts.

**Your Name \***

  
**Email \***  
**Department \***  
**Contact Information: Business Officer Name \***  
**Business Officer Email \***  
**Control Point \***

Select

**FRU Segment Actions**

Do you want to Add, Change, Inactivate, or Delete the FRU? Note: Segments can not be deleted if they have any transactions associated with them.

Select or enter value

**Fund Segment Actions**

Do you want to Add, Change, Inactivate, or Delete the Fund? Note: Segments can not be deleted if they have any transactions associated with them.

Select or enter value

**Account Segment Action**

Do you want to Add, Change, Inactivate, or Delete the Account? Note: Segments can not be deleted if they have any transactions associated with them.

Select or enter value

**Activity Segment Action**

## CCOA Request Form

To help us fulfill your request, please complete this form with as much detail as possible.

This form is used to request changes to the Common Chart of Accounts.

**Your Name \***

  
**Email \***  
**Department \***  
**Contact Information: Business Officer Name \***  
**Business Officer Email \***  
**Control Point \***

Executive Vice Chancellor

**College/Division \***

EVC - All Others

**FRU Segment Actions**

Do you want to Add, Change, Inactivate, or Delete the FRU? Note: Segments can not be deleted if they have any transactions associated with them.

Select or enter value

**Fund Segment Actions**

Do you want to Add, Change, Inactivate, or Delete the Fund? Note: Segments can not be deleted if they have any transactions associated with them.

Select or enter value

**Account Segment Action**

Do you want to Add, Change, Inactivate, or Delete the Account? Note: Segments can not be deleted if they have any transactions associated with them.

Select or enter value

# CCOA Request Form

Instructions and the Form will be on the FMM CCOA Page:

**<https://financemanagement.ucsb.edu/resources/CCOA>**

# Additional Resources

- Previous CCOA Presentations
  - [Town Hall \(August 2022\)](#)
  - [Town Hall \(February 2024\)](#)
- FMM Program Website: [financemanagement.ucsb.edu](https://financemanagement.ucsb.edu)
  - [Common Chart of Accounts](#)
- [Office Hours](#)
- Chart of Accounts Template (coming soon!)

**Questions:** [ga@bfs.ucsb.edu](mailto:ga@bfs.ucsb.edu)



**Next Steps**

# Next Steps

- Spent time with the Common Chart of Accounts - Now - Don't Wait!
- Practice translating from the legacy chart string to the new CCOA
- Use the Template to help your department staff
- Attend Office Hours for Questions

# Q&A



**Questions?**

**UC SANTA BARBARA**