

Chart of Accounts Project Set-Up Guide			
Project Use	User can add a non-shared project	* Project Name	Project Description
Affiliation agreement/ contract		SFGH affiliation agreement	Shared project for SFGH affiliation agreement across multiple departments
		SFGH residents	Shared project for SFGH resident support across multiple departments (same parent/award ID as SFGH affiliation agreement)
		SFGH DSRIP	Shared project for SFGH DSRIP (delivery system reform incentive payments/pool) support across multiple departments (sam parent/award ID as SFGH affiliation agreement)
		Hemophilia program	Shared project for hemophilia program across multiple departments (currently department of Pediatrics and department of Medicine)
		CHO GME residents	Shared project for CHO's GME resident support across multiple departments
		CPMC GME residents	Shared project for CPMC's GME resident support across multiple departments
		Kaiser GME residents	Shared project for Kaiser's GME resident support across multiple departments
		Shriners/Davis GME residents	Shared project for Shriners' GME resident support across multiple departments
		VAMC GME residents	Shared project for VAMC's GME resident support across multiple departments
		Summit GME residents	Shared project for Summit's GME resident support across multiple departments
		Kaiser HI GME residents	Shared project for Kaiser HI's GME resident support across multiple departments
		X	Describes other affiliation agreement/contract project
Capital/plant		Describes capital project	Capital Accounting performs the accounting and reporting functions for capital projects & equipment, software and library collections that have service lives longer than one year. Capital/plant projects are set up centrally by Capital Projects & Facilities Management Accounting.
Costed central activity	X	Describes costed central activity project	Costed central activities are basic central campus functions (e.g. HR, basic police services, internal audit services, payroll, ITS administrative computing) which are funded by allocation of costs to self-supporting auxiliary enterprises (e.g. Campus Life Services).
Faculty/PI/ owner activity	X	Describes faculty/PI/owner activity project	Revenues and expenses for an individual faculty member, a PI, or other individual owner may be tracked in a project. Each project must be assigned to an individual owner. These are not generic departmental funds. A project might include such things as discretionary research, allocation to an individual, clinical trial residuals, academic enrichment, royalty/inventor share or symposiums that an individual is accountable for. Also includes gift and endowment projects that an individual is accountable for.
General		General unspecified	Money received by a department that has no specific project use when received (other than from gifts and endowments which have separate projects). Could include tuition and fees; State general, specific and special appropriations; opportunity funds. Gifts and endowment projects default to this use and may be subsequently reclassified to a more appropriate project use. Gift and endowment projects of a clinical nature should remain in this project use. Can also be used as a default when a project is required.
		Fundraising development	Shared project across multiple departments to capture fundraising and development activity that is department specific. This is not for University Development and Alumni Relations.
		SFGH professional fees	Shared project across multiple departments for professional clinical fees at SFGH which are not part of the SFGH affiliation agreement
		Continuing medical education	Shared project across multiple departments for continuing medical education
		Outside income/consulting	Shared project across multiple departments for earned income from consulting and expert witness fees. All earned income belongs to UCSF as governed by the compensation plan. All outside income generated by the faculty is deposited into the compensation plan and taxed accordingly (dean's tax and departmental tax). Depending on the agreement, the faculty may retain a piece of the income, which normally is distributed to them through payroll.
		Integrated funding model	Shared project across multiple graduate programs for funding 1st and 2nd year graduate students
		Fellows	Shared projects across multiple departments for Fellows support
		Residents - dept funded	Shared projects across multiple departments for residents that are not funded by GME or Hospitals (subsidized by department funds)
		X	Describes other general project which does not belong to any other project use

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Loan (student/faculty/staff)	X	Describes loan project	Projects for loans to students, faculty and staff. Loan projects are primarily set up centrally by Student Accounts.
Medical center and other clinical activities		MC clinical care	Shared project across multiple departments for clinical care activities at the Medical Center. Includes MC PSA (professional service agreement) revenues and expenses, MC purchased services and MC strategic support.
		MC GME residents	Shared project for MC resident support across multiple departments that is funded by GME or Med Center (same parent/award ID as MC clinical care)
		Non MC clinical care	Shared project across multiple departments for professional clinical fees generated at UCSF for clinical service centers/labs (dental clinics)
		Non MC residents	Shared project for UCSF clinic resident support across multiple departments (same parent/award ID as UCSF clinical) (dental clinics)
	X	Describes other special agreement project with the Medical Center	Projects for other special agreements with the Medical Center, e.g. joint ventures
Programmatic investment		Be smart about safety	Shared project across multiple departments for the Be Smart About Safety program
	X	Describes programmatic investment project	Departments may decide to put aside money for a specific program or initiative, such as for teaching support or program development. This project use may also include gifts or endowments that benefit a particular program or initiative. The PI/owner could be an individual or Department/Division.
Recharge		Describes recharge project	Recharge projects are for recharge activities which provide products and/or services to other university organizational units which charge for those products and services through the recharge mechanism. A recharge activity can provide products or services to both internal and external customers. Recharge projects are set up centrally.
Recharge (external only)		Describes recharge (external only) project	Recharge (external only) projects are for recharge activities which provide products and/or services to external customers only. Recharge (external only) projects are set up centrally.
Recruitment/faculty start-up	X	Describes recruitment/faculty start-up project	Projects to track costs associated with commitments made to newly-recruited faculty. The PI/owner attribute identifies the individual involved. Typically expenses are aligned with the offer letter or employment agreement and include salary support and housing loans that are part of the recruitment package. Gifts or endowed chairs should be captured as part of recruitment if they are assigned for that purpose. Capital is included in the recruitment project until the department is ready to spend on the capital, at which point these dollars are transferred to the capital project.
Retention	X	Describes retention project	Projects to track costs associated with commitments and associated expenses made to faculty whom the University is trying to retain. The PI/owner attribute identifies the individual involved. Expenses include salary support which is part of the retention package and bridge funding if for the purpose of retention.
Sponsored project		Describes sponsored project	Projects for an externally-funded research or scholarly activity that has a defined scope of work or set of objectives, which provides a basis for sponsor expectations. Includes extramural grants, contracts and clinical trials. Sponsored projects are generally set up and tracked in RAS, the PeopleSoft Projects module. Sponsored projects are occasionally set up outside of RAS.

Legend		HAS A PULL-DOWN LIST OF AVAILABLE VALUES TO CHOOSE FROM
		PROJECTS ARE PRE-DEFINED AND SHARED ACROSS MULTIPLE DEPARTMENTS
* Note: Project name is limited to 30 characters		