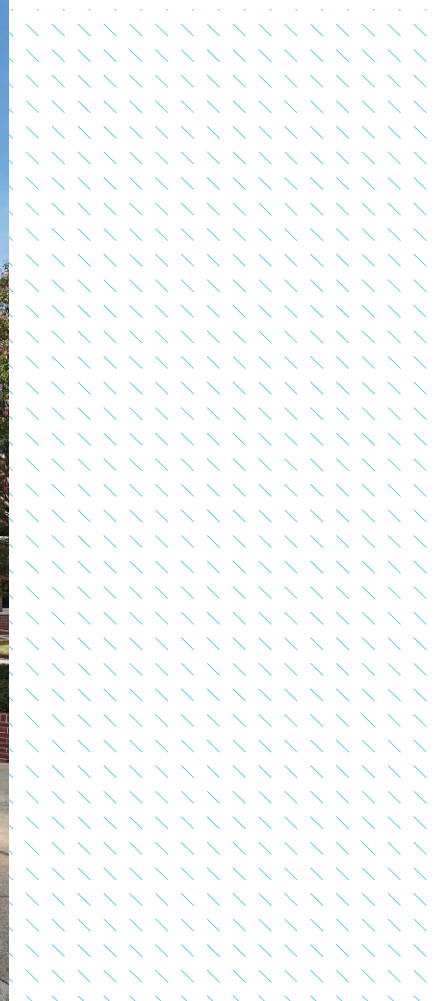




# New Chart of Accounts

## Introduction & Overview

July 2024



This event is being recorded



Submit questions using Q&A feature



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# Agenda

Information Session Introduction

SOAR Program Overview

Chart of Accounts

Project and Grants Management + POETAF

Take Action

Q&A



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# Today's Session

- This presentation is a high-level introduction to UofM's new Chart of Accounts.
- This session is not intended to replace formal training. The SOAR Training Program will launch in late spring/summer 2025 in advance of the July 1, 2025 go live.
- The new Chart of Accounts (COA) will be one of the largest changes associated with the new system implementation.
- **FOAPAL is being replaced with the new Chart of Accounts (COA) across all systems.**



Heidi Kendall  
**SOAR Finance Lead**



Terrice Watson  
**SOAR Projects and  
Grants Lead**



Shundra White  
**SOAR Change  
Management  
Lead**



This event is being recorded



Submit questions using Q&A feature



Video is limited to Presenters

# SOAR Program Overview

We envision a future where our administrative capabilities are a **model of efficiency and effectiveness**, achieving a standard of **operational excellence** that sets us apart. Our commitment to best practices and **innovation for strategic impact** will reshape our operations to support and **strengthen our academic community and research enterprise.**

# SOAR Program Leadership

## EXECUTIVE SPONSOR

**Rene Bustamante**



Executive Vice President  
& Chief Operating and Financial Officer

## PROGRAM OWNERS

**Deborah Becker**



Assistant Vice President,  
Financial Planning and Analysis

**Maria Alam**



Chief Human  
Resources Officer

**Jeff Delaney**



Chief Information  
Officer

## PROGRAM MANAGEMENT

**Colette Williams**



Director, University  
Process Improvement

**Steve Lackey**



Interim Assistant Vice President of  
Financial Accounting and Reporting  
& University Controller

**Nick Papas**



Executive Director of  
Procurement of Contract Services

**Karen Bell**



Assoc Chief  
Info Officer

# Workstream Leaders

- The SOAR project is made up of several **workstreams, each workstream represents a set of business processes** that, when combined, make up all the necessary components of the transformation.
- Each workstream has a **leader and team members** that provide functional area expertise.
- **Visit the SOAR website** to see the program team members involved with this **cross-campus collaboration.**

## Workstream Leads



Heidi Kendall  
**Finance**



Bridgette Decent  
**Reporting**



Rodney Gray  
**Conversions**



Kerri Reece  
**Procurement**



Timothy Cureton  
**Security & Controls**



Danny Linton  
**Training**



Terrice Watson  
**Projects/Grants**



Lauren Byrd  
**Testing**



Shundra White  
**Change Mngmt**



Amanda Clarkson  
**Human Capital**



Shruti Bapat  
**Cutover**



Caroline Landaiche  
**Communication**



Madison Ellison  
**Planning & Budget**



Raj Manickavasagam  
**Technology**

# Reasons for Change

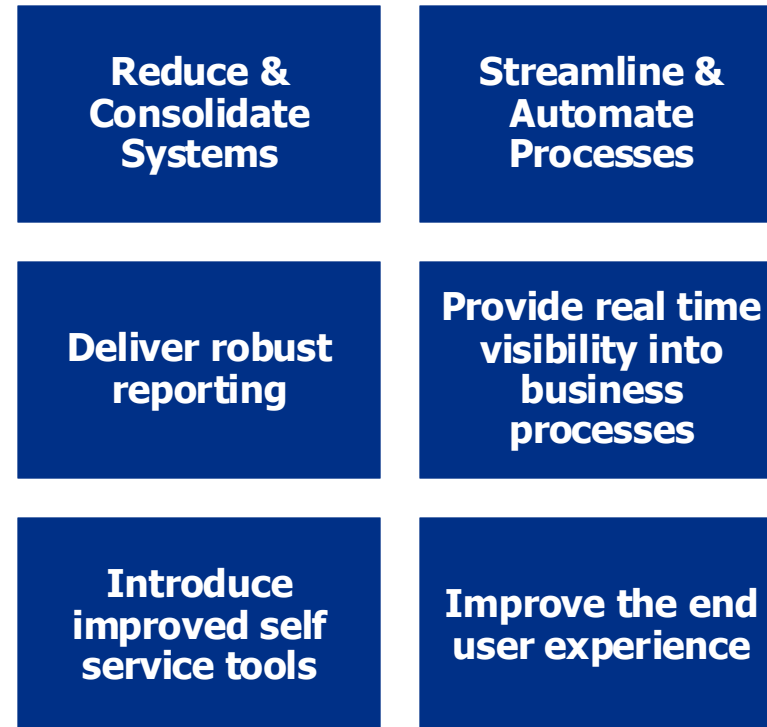
## Why the Change?

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- HR and Finance processes, reports, and technologies have **pain points** that **hamper faculty and staff to effectively do their work.**
  - Current systems are **aging and fragmented**, with an increasing number of **bolt-ons** and **workarounds.**
  - We must **create efficiencies, replace manual processes** and duplicate data entries **with standard simplified business processes**
  - Need **automation, workflows, tracking** and **improved self-service**
  - Desire **robust reporting capabilities** with **increased data transparency**
  - Banner has reached its life on premise and **needs to shift to a modern user interface**
- 

## Benefits of the Change

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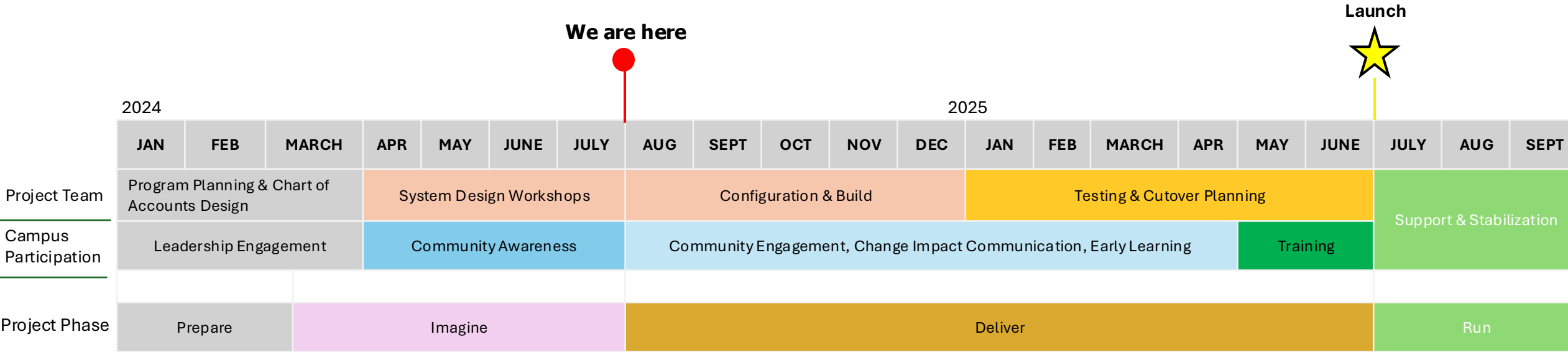


# What's Changing?

<p><b>Transitioning</b> June 2025</p>	<p><b>Tiger Buy – Chrome River – Fixed Assets Workflow – Spreadsheet Budgeting -Records Inventory</b></p>			<p><b>Budget Revision/Budget Transfer Form</b></p>	<p><b>WorkForum – Kronos – Web Time Entry – eContract – Separation and Clearance Form – Employee Information Updates – SAMS Performance Reviews – Learning Curve</b></p>			
<p><b>Launching</b> July 2025</p>	<p><b>ORACLE®</b> <b>Enterprise Resource Planning (ERP) / Finance</b></p>			<p><b>ORACLE®</b> <b>Enterprise Performance Management (EPM)</b></p>	<p><b>ORACLE®</b> <b>Oracle Human Capital Management (HCM)</b></p>			
<p>Delivers financial applications designed to automate and streamline financial management.</p>			<p>Delivers budget and reporting applications designed to plan, budget, and forecast</p>		<p>Delivers human resource applications and cloud technology to streamline workforce management, including employee self-service</p>			
<p><b>Record to Report</b></p>	<p><b>Projects &amp; Grants</b></p>	<p><b>Procure to Pay</b></p>	<p><b>Planning &amp; Budgeting</b></p>	<p><b>Financial Reporting</b></p>	<p><b>Recruiting</b></p>	<p><b>Compensation &amp; Benefits</b></p>	<p><b>Payroll, Time &amp; Labor</b></p>	<p><b>Talent &amp; Performance</b></p>
<ul style="list-style-type: none"> <li>• General Ledger</li> <li>• Chart of Accounts</li> <li>• Banking</li> <li>• Asset Management</li> </ul>	<ul style="list-style-type: none"> <li>• Contracts &amp; Grants</li> <li>• Capital Projects</li> <li>• Related Receivables</li> </ul>	<ul style="list-style-type: none"> <li>• Procurement</li> <li>• Payables</li> <li>• Payment</li> <li>• Supplier Management</li> </ul>	<ul style="list-style-type: none"> <li>• Financials and Workforce Planning and Budgeting</li> </ul>	<ul style="list-style-type: none"> <li>• Financial Reports and Analytics</li> </ul>	<ul style="list-style-type: none"> <li>• Talent Acquisition (recruiting &amp; onboarding)</li> </ul>	<ul style="list-style-type: none"> <li>• Compensation Administration</li> <li>• Employee Benefits</li> <li>• Enrollment</li> </ul>	<ul style="list-style-type: none"> <li>• Time keeping</li> <li>• Payroll processing</li> </ul>	<ul style="list-style-type: none"> <li>• Performance Management Administration</li> <li>• Learning</li> </ul>



# SOAR Timeline



# Chart of Accounts (COA)

# Chart of Accounts

- The new COA will be in effect **July 1, 2025**
- If you **conduct any financial transactions using FOAPAL**, in any system, **this change will impact you.**

## UofM will adopt a new Chart of Accounts to coincide with the launch of Oracle Cloud

- The Chart of Accounts, or COA, creates a common language to record all financial transactions
- Each segment in the COA has a distinct definition and purpose. When these segments are combined, the full chart string presents a complete picture of each financial transaction.
- All financial related entries must be recorded and reported using this new structure on **July 1, 2025**

## COA BENEFITS



Meaningful, flexible, and real-time reporting to meet University needs



Categorized financial transactions and organized data



Serve as the common language for financial transactions

# Chart of Accounts Team

The COA Team included representatives from a cross section of campus for a holistic view of the future state design.

COA Team Representatives	
Financial Planning & Analysis	Auxiliaries
Research/Grants Accounting	Procurement & Contract Services
Financial Reporting	Human Resources
The UofM Foundation	Technology (Reporting, System Initiatives)

The COA Team furthered their reach through a survey with responses provided by:

Survey Respondents	
Human Resources	Office of Institutional Research
Financial Reporting and System Initiatives	Financial Planning and Analysis
Housing and Residential Life	College of Arts and Sciences
Conference & Event Services	Auxiliary and Financial Operations
Procurement & Contract Services	University of Memphis Foundation

# Chart of Accounts Development

Information Gathered	Sampling of Workshops Conducted	
<ul style="list-style-type: none"> <li>• Current COA Structure</li> <li>• Current COA Values</li> <li>• State or System COA Requirements</li> <li>• Boundary System List</li> <li>• High Level COA Stakeholder List</li> <li>• Internal Stakeholder Questionnaires</li> </ul>	<ul style="list-style-type: none"> <li>• ERP Oracle COA Team Kickoff (12/11/23)</li> <li>• ERP Oracle COA Leading Practice Workshop (1/3)</li> <li>• ERP Oracle COA – Oracle and Project Portfolio (1/10)</li> <li>• ERP Oracle COA Design Workshop (1/18)</li> <li>• ERP Oracle COA Team meeting (1/23)</li> <li>• ERP Oracle COA Design Walk through w/Scenarios (1/25)</li> <li>• ERP Oracle COA Governance Workshop (1/26)</li> <li>• ERP Oracle COA High Level Mapping (2/1, 2/2, 2/5, 2/6)</li> </ul>	<ul style="list-style-type: none"> <li>• ERP Oracle COA Ancillary Data Workshop (2/5)</li> <li>• COA: Fund Type/Fund Source discussion (2/7)</li> <li>• ERP Oracle COA Governance Design Session (2/13)</li> <li>• ERP Oracle COA Team Weekly meetings (multiple)</li> <li>• ERP Oracle COA Present Future Design (2/15)</li> <li>• ERP Oracle COA Meeting with Athletics (2/15)</li> <li>• ERP Oracle COA Data Gathering &amp; Mapping (2/16)</li> </ul>

# Chart of Accounts Definition



Chart of Accounts is the primary way to classify financial transactions which drive key reports and queries around University administrative operations



Chart of Accounts is comprised of multiple segments, with each segment having a separate definition, put together to a specific structure.



Chart of Accounts is typically supplemented with attributes and details captured in transactions and subledgers to create the full picture of operation results.

# Chart of Accounts Fundamentals

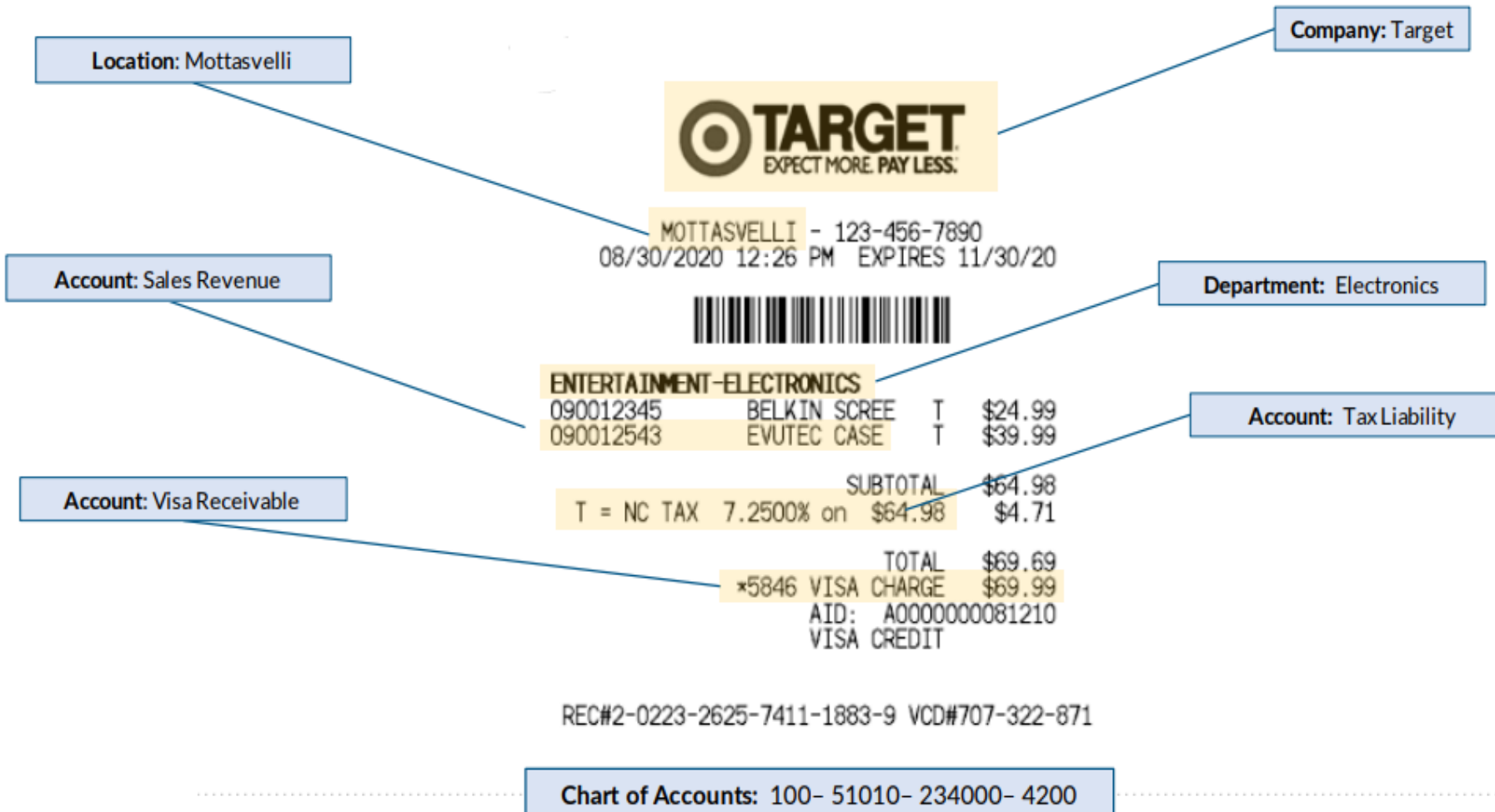
Chart of Accounts is a set of predefined segments (in a pre-defined sequence), with a fixed list of values available under each segment

Every segment is a critical dimension in representing some aspect of the business – legal, financial, operational, management – on the books for every transaction

Every event on a transaction that has a financial impact generates accounting entries posting it to a combination of segment values in the General Ledger

All segments may not be relevant for all transactions, but all segments of a combination entry is always mandatory and cannot be blank

# Chart of Accounts





# Overview of COA Changes

# COA Segments

Order	Segment	Mandatory	Data Type	Description
1	Entity	Yes	Alphanumeric	<b>Identifies a major institutional operating unit.</b> University, Foundation, HERFF and Auxiliary Services Foundation
2	Fund	Yes	Alphanumeric	<b>identifies overall spending restriction</b> of the fund source. Track budget restrictions and spending.
3	Org	Yes	Alphanumeric	Activity <b>represents the divisional breakdown based on operation and function</b> for financial activity.
4	Account	Yes	Alphanumeric	<b>Account classifies nature of transaction.</b> Examples: asset, liability, expense, revenue, net position
5	Program	Yes, for expenses No, for other transactions	Alphanumeric	Classifies <b>the nature of the University's major areas.</b> Examples: instruction, research, student services, etc.
6	Activity	As Needed	Alphanumeric	<b>Identify and group unit projects, special events and other items</b> that do not align with other segments.
7	Initiative	Required for Expenses	Alphanumeric	A <b>cross-organization segment</b> to identify activity for <b>organization initiatives and/or where two or more departments contribute</b>
8	Future 1	As Needed	Alphanumeric	<b>A segment that allows future growth</b>

# COA Notable Changes

- Organization Codes will be limited to Departments in the General Ledger.
- Oracle Balance Sheet will require Entity, Fund, Organization and Account Code.
  - *All other COA Segments are optional but, will be recorded and can be tracked.*
- In addition to what is required on the Balance Sheet, Oracle Expenses will require a Program Code, but Revenues will not.
- If a COA segment is not needed, default values will be populated.
- Grants and Contracts details will be in the PGM Subledger, not the General Ledger. The General Ledger will have summary level activity.
- Activity Codes will be used to allow Departments to track specific transactions.
- The Activity Codes will have meaningful descriptions.



# COA Segments & Hierarchies

# Entity

- The University and Foundations will use the same Chart of Account structure.
- The Entity Code will be used to separate the transactions.

Parent	Child Value	Description
1A		University of Memphis
	10	University of Memphis
2A		Auxiliary Services Foundation
	20	Auxiliary Services Foundation
3A		University of Memphis Foundation
	30	University of Memphis Foundation
	31	HERF

# Fund

Definition	Individual pot of money that's being budgeted for or funded and spent against.
Overall	The Fund segment will follow a hierarchy that is consistent with the reporting required by the Tennessee Board of Regents (TBR).
Hierarchy 5 Parents 1 Child	One parent is used to summarize all transactions regardless of fund value. This is used to quickly confirm all transactions. Four parents are used to align the fund hierarchy with the reporting required by the TBR. The child contains the various funds such as donor funds, state funds, tuition funds, and others with an appropriate level of granularity.
Characters 6	The six characters allow for the appropriate rollup summary levels as well as the detailed accounts. The six characters allow for proper growth as less than 10% of available values are used.
Default No	The Fund segment is a required field and requires a positive value.
Mapping Old Account Segment	Mapping will go from the current Fund segment to this segment. The consolidation of restricted funds allows for summarization of restricted financial data at the GL level while having the detail in the PGM module.

Parent 1	Parent 2	Parent 3	Parent 4	Parent 5	Child Value	Description
11000A						All Funds
	11000B					Unrestricted
		11000C				Education and General
			11000D			Undesignated E and G
				11000E		Undesignated E and G
					110001	Undesignated E and G
					110002	Fringe Benefits
					112000	Intercollegiate Athletics
					112200	K – 12 Schools
					112500	University Technology and ERP
					114000	Indirect Cost Recovery
					114500	Cost Share
					114600	Faculty Research Grant
					114650	Startup
					116000	Lambuth
					119000	Budget
			12000D			
				12010E		Designated E and G
						Reserved for Working Capital

# Org

Definition	Divisional breakdown based on operation and function for financial activity
Overall	The Org segment will be consistent with the current Org segment with some values being removed to align with the definition.
Hierarchy 5 Parents 1 Child	Executive (Parent) Sub Executive (Parent) Division (Parent) Sub-Division (Parent) Department (Parent) Sub Department (Child)
Characters 5 Characters	The five characters allows for growth as less than 20% of available values are being utilized.
Default No	All transactions require an Org value, no default is created.
Mapping Old Org Segment	Mapping will go from the current Org segment to this segment. PI Org codes will no longer be shown in the GL. That security and that level of details will be shown in the PGM module.

Parent 1 - Executive	Parent 2 - Sub Executive	Parent 3 - Division	Parent 4 - Sub Division	Parent 5 - Department	Child Value - Sub Department	Descriptions
1000A						President Units
	1000B					President Units
		1000C				President Units
			1000D			President Units
				1000E		Office of President
					10000	Office of President
				1100E		University Counsel
					11000	University Board Governance
					11000	University Counsel
				1200E		Staff Senate
					12000	Staff Senate
				1300E		Athletic Committee
					13000	Athletic Committee
				1400E		Government and Community Relations
					14000	Government and Community Relations

# Account

Definition	Nature of the transaction (e.g. asset, liability, expense, revenue, net position)
Overall	The Account segment will be consistent with the classifications used for accounting transactions including assets, liabilities, net position, revenue and expense accounts.
Hierarchy 6 Parents 1 Child	One parent is used to summarize assets, liabilities, net position, revenue and expenses. Five parents are used for grouping according to financial statements and other management reports. The child contains the various asset, liability, net position, revenue and expense accounts.
Characters 5 Characters	The five characters allow for the appropriate rollup summary levels as well as the detailed accounts. The five characters allow for proper growth as less than 10% of available values are used.
Default No	The Account segment is a required field and requires a positive value.
Mapping Old Account Segment	Mapping will go from the current Account segment to this segment.  There have been changes in the Account codes between Banner and Oracle, so caution is needed when first using Oracle.

Parent 1	Parent 2	Parent 3	Parent 4	Parent 5	Parent 6	Child Value	Descriptions
1000A							Total Assets
	1000B						Current Assets
		1000C					Current Assets
			1000D				Cash and Cash Equivalentts
				1000E			Claim on Cash
					1000F	10000	Claim on Cash
						10001	Cash in Bank General Operation
						10002	Cash in Bank UOM Disbursement
						10003	Cash in Bank Payroll
						10004	Cash in Bank – Touchnet
						10005	Cash in Bank – First Bank
						10006	Cash – US Bank EP
						10007	Cash – JP Morgan Bank JP
				1010E			Cash in Savings
					1010F		Cash in Savings
				1020E			Petty Cash and Change Funds
					1020F		Petty Cash and Change Funds



# Program

Definition	Nature of the university's major areas (i.e., instruction, research)
Overall	The Program segment will be consistent with the current program segment as it is used to categorize transactions consistent with NACUBO Function Codes.
Hierarchy 2 Parents 1 Child	One parent is used to summarize all transactions regardless of program code. This is used to quickly confirm all transactions. One parent is used to summarize to the NACUBO Function Codes. The child is slightly more granular than the NACUBO Function Code to provide some additional details.
Characters 3 Characters	The three characters allow more detailed child levels to roll up to parents that are consistent with NACUBO. The three characters allow for proper growth if new codes are needed without creating excessive data entry.
Default Yes	Not all transactions require a program code so a default of "000" was established.
Mapping Old Program Segment	Mapping will go from the current Program segment to this segment. Many of the Banner Program Codes will now be reflected in other COA segments.

Parent 1	Parent 2	Child Value	Description
10A			All Program Values
	20B		Instruction
		200	General Academic Instruction
		201	Community Education
		202	Preparatory and Remedial Instruction
	25B		Research
		250	Institutes and Research Centers Applied Research
		251	Institutes and Research Centers Basic Research
		252	Institutes and Research Centers Clinical Research
		253	Institutes and Research Centers Developmental Research
		258	Centers of Excellence
		260	Individual and Project Applied Research
		261	Individual and Project Basic Research
		262	Individual and Project Clinical Research
		263	Individual and Project Developmental Research
		264	University Research
	30B		Public Service
		300	Public Service
		301	Community Service

# Activity

Definition	Identify and group individual organizational unit projects, special events and other items that do not align with other segments
Overall:	The Activity segment will have a mix of values all intended to provided department level reporting. The mix of values will be both values specifically identified for an area and values which can be used by many areas.
Hierarchy 3 Parents 1 Child	One parent is used to summarize all transactions regardless of fund value. This is used to quickly confirm all transactions. Two parents are used to align provide individual area ranges as well as more generic groupings of the activity codes. The child contains the various activities as identified by the areas across the University of Memphis organization.
Characters 5 Characters	The five characters allow for the appropriate rollup summary levels as well as the detailed accounts. The five characters allow for proper growth as less than 10% of available values are used.
Default Yes	Not all transactions require an activity code so a default of "00000" was established.
Mapping Various	Only some activity code values will require mapping and generally will come from the current Org and Fund segments.

Parent 1	Parent 2	Parent 3	Child Value	Description
1000A				All Activities
	1000B			Activity Based
		1000C		General Academic Activity
			10000	Homecoming
			10001	Distinguished Alumni Awards
			10002	Faculty Distinguished Teaching & Research Awards
			10003	Student Retention
			10004	Employee Retention
			10005	Professional Development
			10006	Student Pantry
			10007	Career Closet
			10008	Fall Break Campus Project
			10009	Spring Break Campus Project
			10010	Grad Student Travel
			10011	Faculty Travel
			10012	Assessment
			10013	Training
			10014	Outreach and Prevention

# Initiative

Definition	A cross-organization used segment to identify activity for organization initiatives and/or where two or more departments contribute.
Overall:	The Initiative segment will create new functionality by capturing meaningful operations between two or more Orgs..
Hierarchy 4 Parents 1 Child	One parent is used to summarize all transactions regardless of initiative value. This is used to quickly confirm all transactions. Three parents are used for grouping and reporting of the various initiatives including strategic, local, and others.. The child tracks the specific operation where two or more organizations contribute.
Characters 5 Characters	The five characters allow for approximately 100,000 values. The five characters allow for proper growth.
Default Yes	Not all transactions require an Initiative code so a default of "00000" was established.
Mapping None	No mapping exists for the initiatives as this is a new segment that has not been tracked in the past.

Parent 1	Parent 2	Parent 3	Parent 4	Child Value	Description
1000A					Total Initiatives
	1000B				Strategic Initiatives
		1000C			Aggressively Provide Access
			1000D		Higher Enrollment and Admission Standards
				10000	
			1100D		Diversified Student Sourcing
			1200D		Purposeful and Distinctive Recruitment and Marketing
			1300D		Improved Access and Affordability
			1400D		Growing Graduate and Professional Enrollment
			1500D		Increased UofM Global Enrollment
			1600D		Differentiate Lambuth Learning
		2000C			Create Opportunities to Succeed
			2100D		Student Success 2.0
			2200D		Second to None Safety & Security
			2300D		Cohesive Campus Community
			2400D		Expanded, High Quality and Affordable Housing
			2500D		Diversified, Delicious, Convenient and Affordable Dining
			2600D		Rich and Exciting Campus Life

# COA Examples: Office of the President

## Office of the President

### Current State FOAPAL:

Chart of Account		Fund		Organization		Program	
U	University of Memphis	110001	Undesignated E and G	100000	Office of President	4500	Office of the President
U-110001-100000-4500							



### Future State COA:

Entity		Fund		Organization		Account		Program		Activity		Initiative		Future 1	
10	University of Memphis	110001	Undesignated E and G	10000	Office of President	XXXXX		450	Office of the President	00000	Default Activity	00000	Default Initiatives	00000	Default Future
<b>10-110001-10000-XXXXX-450-00000-00000-00000</b>															

**10 - 110001 - 10000 - XXXXX - 450 - 00000 - 00000 - 00000**  
 Entity                  Fund                  Org                  Account                  Program                  Activity                  Initiative                  Future 1

# COA Example: University Middle School

## University Middle School

### Current State FOAPAL:

Chart of Account		Fund		Organization		Program	
U	University of Memphis	110001	Undesignated E and G	237600	Middle School Campus	3701	Middle School Campus
U-110001-237600-3701							



### Future State COA:

Entity		Fund		Organization		Account		Program		Activity		Initiative		Future 1	
10	University of Memphis	112200	PreK-12 Schools	28570	Middle School Campus	xxxxx		354	Ancillary Support	00000	Default Activity	00000	Default Initiatives	00000	Default Future
<b>10-110001-10000-XXXXX-450-00000-00000-00000</b>															

**10 - 112200 - 28570 - XXXXX - 354 - 00000 - 00000 - 00000**  
 Entity Fund Org Account Program Activity Initiative Future 1

# COA Example: Foundation

## Foundation – Cecil C Humphreys Law Enrichment

### Current State FOAPAL:

Chart of Account		Fund		Organization		Program	
F	University of Memphis Foundation	25734	John P Colton Jr Scholarship	206	School of Law	SF	Scholarships and Fellowships
F-25734-206-SF							



### Future State COA:

Entity		Fund		Organization		Account		Program		Activity		Initiative		Future 1	
30	University of Memphis Foundation	285734	John P Colton Jr Scholarship	25000	School of Law	XXXXX		810	Scholarships	00000	Default Activity	00000	Default Initiatives	00000	Default Future
<b>30-2857341-15000-XXXXX-810-00000-00000-00000</b>															

**30** - **285734** - **25000** - **XXXXX** - **810** - **00000** - **00000** - **00000**  
 Entity Fund Org Account Program Activity Initiative Future 1

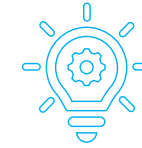
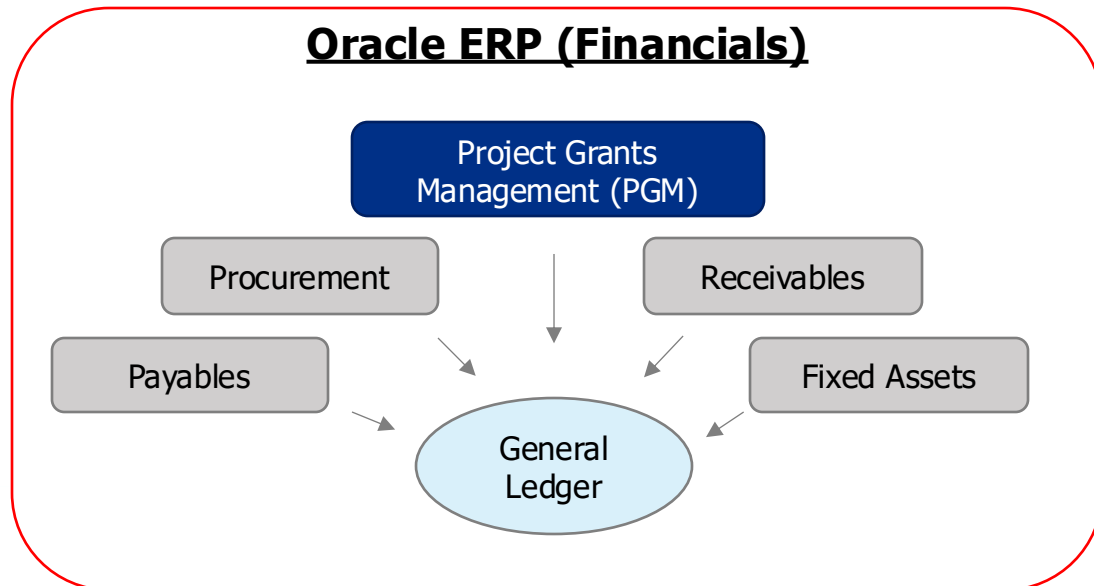
# Project Grants Management & POETAF

# Project Grants Management & POETAF

The Project Grants Management (PGM) module is a subledger in Oracle.

PGM is used to track more complex projects that require additional monitoring.

**Sponsored Projects, Internally Funded Faculty Projects, and Capital Projects will be managed within PGM.**



## Key Concepts

- Transactions charged to projects use the POETAF chartstring to capture the details of the project to be charged.
- POETAF is used in all subledgers (AP, Procurement, Expenses etc.) **when entering a project transaction.**
- Oracle will be configured so that POETAF values translate and roll up to applicable Chart of Accounts (COA) segments in the General Ledger (GL).



# POETAF

Segment	Description
<b>P</b> roject Number	Represents a "body of work" that often has a start and end date that spans across fiscal years Represents the Contract and Grant, Internally Funded and Capital Project
Expenditure <b>O</b> rganization	Represents the academic operating unit responsible for the transaction
<b>E</b> xpenditure Type	Classifies the nature of the transaction (asset, liability, expense, revenue)
<b>T</b> ask Number	Identifies the activities used to break down a PGM project future Tasks allow for further detail when assigning budget and costs within a project
<b>A</b> ward Number	This is an umbrella record containing overall financial and demographic information
<b>F</b> unding Source	Identifies the external sponsor or internal funding source

# POETAF Examples

**Project Number - Expenditure Organization - Expenditure Type - Task Number - Award Number - Funding Source**

POETAF	Project Number	Expenditure Organization	Expenditure Type	Task Number	Award Number	Funding Source
External Sponsor	A250015A	23200 - Instruction Curriculum Leadership	74250 - Supplies	01	A250015	National Institute of Health
	A250015A-23200-74250-01-A250015-National Institute of Health					
Internally Funded	F100000 A. Jones CEPR	23100 - Counsel Education Psych Research	74251 - Computers	Task 1 – IDCR		
	F100000 A. Jones CEPR	23100 - Counsel Education Psych Research	74207 - Dues & Subscriptions	Task 2 - Start-Up		
	F100000 A. Jones CEPR	23100 - Counsel Education Psych Research	74200 – Consulting Services	Task 3 - Research Grant (Dept)		
	F100000 A. Jones CEPR	23100 - Counsel Education Psych Research	74250 - Supplies	Task 4 - Research Grant (Research)		
	F100000 A. Jones CEPR – 23100-74251-01 F100000 A. Jones CEPR – 23100-74207-02 F100000 A. Jones CEPR – 23100-74200-03 F100000 A. Jones CEPR – 23100-74250-04					

**Take Action**

# Stay Engaged

Here are actions you can take today in preparation for the transition from FOAPAL to COA:

- Do you know of a new activity code or initiative? Email Heidi Kendall at [hkendall@memphis.edu](mailto:hkendall@memphis.edu)

## Stay Engaged

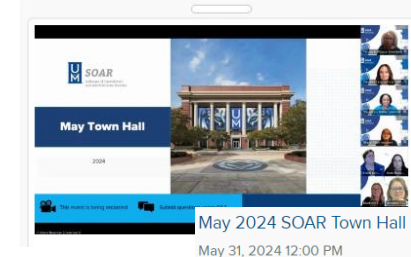
**Review past Newsletters**



**Check the SOAR website and calendar for upcoming events**



**Miss an event? You can watch past events on demand**



# Q&A

# Chart of Accounts (COA) & POETAF

## **How will I be able to find my new Chart of Accounts?**

*Answer:* There are continued discussions on the best approach. The Finance and HR Program Guides remain an option the SOAR team is exploring

## **How would my current award/projects relate to Banner FOAPAL?**

*Answer:* Your current awards will be the same as your Cayuse Award Number.





**SOAR**

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and Administrative Resolve