

Once you receive your new fund number, you will then need to request a new task.

- If it is a GFT account, you will need to check to see what the next GFT task number would be:
 - Go into the AE pull up the Project number to see what the last GFT task number is, if the last GFT task is for example GFT003, then you would request GFT004.
- When requesting the new Task number please provide Associate Director, BOC or BOC Supervisor with the following information:
 - Name of the Task – Name of the Gift using naming convention above
 - Fund Number
 - Project
 - Task number (GFT00X)
 - Program (000 always)
 - Purpose (62, 44, or 64)
 - Activity (for gifts, it should be 000000)

We only need to request a new Fund segment when it is for a specific donation.

When we need a new income, conference, Academic Salary Cost Recovery, or Research and Education task, send the requests directly to Associate Director of BOC or BOC Supervisor. The New Segment Form is not needed for new tasks.

New Faculty Project (for Advisors and CE Specialists)

When requesting a new Faculty Project (FP), please use this naming convention:

FP+ORG+4 DIGIT HIRE DATE (MMDD)+DESCRIPTION (Advisor Name, Location)

- Example: FPALAM1001 John Smith UCCE Alameda County
(for new UCCE advisor for Alameda County with hire date of 10/01)

New GL Project (for Advisors and CE Specialists)

When requesting a new GL Project, please use this naming convention:

GL+ORG+4 DIGIT HIRE DATE (MMDD)+DESCRIPTION (Advisor Name, Location)

- Example: GLALAM1001 John Smith UCCE Alameda County
(for new UCCE advisor for Alameda County with hire date of 10/01)

Reminders:

- When requesting a new FUND for a gift - once received you will need to request a new TASK
- When you receive the new FUND or TASK make sure to add the new CoA to Finjector.

Sponsored Projects naming convention:

Old: KL0+KFS account number

New (no L account): SP0+ GTS#

When an award needs more than one project, the naming convention will follow SP1 + GTS#, SP2 + GTS#, ...

CS0 + GTS# - Cost Share project. If more than one cost share project is needed, the naming convention will follow CS1 + GTS#, CS2 + GTS#, ...

KEY:

Typical FUNDS:

4H:

Regular Income - old XXX4HIN accounts - FUND 13U39

Enrollment Fees - XXX4HFE - FUND 13U37

Marter Gardener: Income Account - FUND 13U38

Master Food Preserver: Income - FUND13U36

Other Income: (TASKS - INCXXX or CNFXXX)

Income - FUND 12101

Publication Income - FUNDS 12100 or 13U20 – All new Tasks for Publication should be created with fund 12101.

No INCOME should POST TO these: - NO SCC for income and NO SURVEYS:

- **Sponsored Projects:**

KL0XXXXXX
SP0XXXXXX

- **FUNDS:**

- 2XXXX - awards
- 3XXXX - endowments
- 6XXXX - gifts
- 7XXXX - gifts
- 19974 - STATE General Funds - Permanent
- 19976 - STATE General Funds - Temporary
- 19978 – Academic Salary Cost Recovery or Start-UP
- 19979 - STATE General Funds - FIRE
- 19900 - STATE General Funds
- 19915 - STATE UCOP Climate Action Initiative
- 13U58 - Research and Education

Instructions to Close a Task:

- Budget minus expenses need to equal zero.
- There cannot be any Commitments. Close any open Pos before closing the task.
- Ensure there are no surveys posting income to that task.
- Check if there is any payroll posting to that task (Cognos 391)
- Close task by Selecting project, Manage Financial Project Plan, select the TASK to close and enter a Transaction Start Date of 1/1/2024 and a Transaction Finish Date of the date you are closing it. Enter the word “CLOSED” at the beginning of the Task Name. Click SAVE. Go to Actions, Manage Tasks, to move the closed task to the end of the list.
- Go to Finjector and remove that Task CoA to prevent customers from using it.
- Inform your client (PI, Office Manager, Director, etc) the Coa Task has been closed and cannot be used.

TASK KEY:

			Additional Information				Project and Financial Department NOTES
TASKS Number	TASK NAME		PROGRAM	PURPOSE	FUND	ACTIVITY	
ACR025	FY 24-25 ACADEMIC COST RECOVERY 19978		000	62	19978	202044	
ACR026	FY 25-26 ACADEMIC COST RECOVERY 19978		000	62	19978	202044	
ACR027	FY 26-27 ACADEMIC COST RECOVERY 19978		000	62	19978	202044	
RED01	RESEARCH AND EDUCATION + Advisor Name 13U58		000		13U58	000000	
CNF001...	UNIT ORG + Program (MG, MFP, 4H) + Conference Income + Specific 12101		000		12101	000000	

INC001...	UNIT ORG + Program (MG, MFP, 4H) + Publications + Specifics 12101			12101		<p>Some publication Income Tasks have fund 12100 or 13U20. For all New ones, use fund 12101 always.</p>
INC001...		000	62	varies	000000	
	UNIT Org + Master Gardener + Specific 13U38			13U38		
	UNIT Org + Master Food Preserver + Specific 13U36			13U36		
	UNIT Org + 4H Income + Specifics 13U39			13U39		
	UNIT Org + 4H Enrollment Fee 13U37			13U37		
	UNIT Org + 4H Enrollment Fee 13U39			13U39		
				12101		
						<p>Only for these Counties: Alpine, Kings, Calaveras, Mariposa, Napa, Riverside, San Bernardino, Santa Barbara, Sacramento, Solano, Tulare, Tuolumne and Yolo.</p>
GFT001...	Unit Org + Recharge NUD Funding 12100	000	62	varies/unique for each task	000000	<p>Do not create a separate TASK for the same Gift Fund, even if they ask to track something separately. This will complicate things with the recording of Gifts. There have been one or two exceptions but we should not do this again.</p>

END001...		000	62	varies/unique for each task	000000	
IAW001...		000	62 or 44	varies 19900	000000	
RR2425	FY2425 Unit Org + RECHARGE RATE + Type 12100	000	44	12100	000000	
RR2526	FY2526 Unit Org + RECHARGE RATE + Type 12100	000	44	12100	000000	
RR2627	FY2627 Unit Org + RECHARGE RATE + Type 12100	000	44	12100	000000	
RR0NUD	Unit Org + Recharge NUD Funding 12100	000	44	12100	000000	
RATE01	DEPRECIATION EXPENSE 12100	000	44	12100	000000	

ORG Key:

ORG Name	ORG code	Financial Dept
ANR Davis Building	BLDG	9934111
ANR Business Operations Center	BOC	9933111
ANR Contracts and Grants Office	OCG	9937111
ANR CSIT IT Group	IT	9938111

Facilities, Planning, and Management	FPM	9934111
65CSIT Web Group	WEB	9938112
ANR Development Office	DEV	9913111
Publications/Media/Graphic Design	PUBS	9921411
ANR EH&S/ Risk Services	RS	9932411
4-H Foundation	4HF	9913112
Office of Human Resources	HR	9935111
Workplace Inclusion and Belonging	WIB	9935121
Learning and Development	LD	9935112
ANR Office of Controller	OCB	9932111
Chief Information Security Office	CISO	9939111

AVP Contingency Fund	AVP Cont Fund	9921112
AVPBO Immediate Office	AVP Imm Off	9931111

Lindcove	LREC	9922171
Sierra Foothill	SFRC	9922181
Kearney	KREC	9922161
South Coast	SCRC	9922191
Hopland	HREC	9922141
Westside Rec	WSRC	9922201
Hansen Agricultural	HANS	9922131
Desert	DREC	9922121
Intermountain	IREC	9922151

Agricultural Issues Center	AIC	9924161
CalFresh Healthy Living	CALFRESH	County Financial Dept

UNIVERSITY OF CALIFORNIA
Agriculture and Natural Resources

California 4-H Youth Development Program	4H	9924361
California Institute for Water Resources	CIWR	9924401
Community Nutrition and Health	CNH	9924261
Expanded Food and Nutrition Education Program	EFNEP	County Financial Dept
Informatics and GIS Program	IGIS	9924211
Integrated Pest Management Program	IPM	9924561
Master Food Preserver	MFP	9924262
Master Gardener Program	MGP	9924461
Nutrition Policy Institute	NPI	9924301
Organic Agriculture Institute	OAI	9924501
Rosenberg National Forum on Water Policy	RNFW	
Statewide Operations	SWPR OPS	9921811
Statewide Program and REC Operations	SWPR	9921611
Sustainable Agriculture Research and Education Program	SAREP	9924611
UC Environmental Stewards	UES	9924111
UCANR Fire Network	FIR	9924811
Western IPM	WIPM	9924562

ALAMEDA COUNTY	ALAM	9923211
AMADOR COUNTY	AMAD	9923212
BUTTE COUNTY	BUTT	9923213
CALAVERAS COUNTY	CALV	9923214
CAPITOL CORRIDOR	CCMP	9923265
COLUSA COUNTY	COLU	9923215

CONTRA COSTA COUNTY	CNTR	9923216
CENTRAL SIERRA NEVADA	CSNP	9923266
EL DORADO COUNTY	ELDO	9923212
FRESNO COUNTY	FRES	9923218
FMCP	FMCP	9923267
GLENN COUNTY	GLEN	9923219
HUMBOLDT COUNTY/DEL NORTE	HUMB	9923220
IMPERIAL COUNTY	IMPE	9923221
INYO/MONO COUNTY	INYO	9923222
KERN COUNTY	KERN	9923223
KINGS COUNTY	KINC	9923224
LAKE COUNTY	LAKE	9923225
LASSEN COUNTY	LASS	9923226
LOS ANGELES COUNTY	LOSA	9923227
MADERA COUNTY	MADE	9923228
MARIN COUNTY	MARN	9923229
MARIPOSA COUNTY	MARI	9923230
MENDOCINO COUNTY	MEND	9923231
MERCED COUNTY	MERC	9923232
MODOC COUNTY	MODO	9923233
MONTEREY COUNTY	MONT	9923234
NAPA COUNTY	NAPA	9923235
ORANGE COUNTY	ORAN	9923237
PLACER/NEVADA COUNTY	PLAC	9923238
PLUMAS/SIERRA COUNTY	PLUM	9923239
RIVERSIDE COUNTY	RIVE	9923240
SACRAMENTO COUNTY	SACR	9923241
SAN BENITO COUNTY	BNTD	9923242
SAN BERNARDINO COUNTY	BERN	9923243
SAN DIEGO COUNTY	DIEG	9923244

SAN JOAQUIN COUNTY	SANJ	9923246
SAN LUIS OBISPO COUNTY	LUIS	9923247
SAN MATEO/SAN FRANCISCO COUNTIES/ELKUS RANCH	SANM/ELKS	9923248
SANTA BARBARA COUNTY	SBRB	9923249
SANTA CLARA COUNTY	SNTC	9923250
SANTA CRUZ COUNTY	SCRZ	9923251
SHASTA COUNTY	SHAS	9923252
SISKIYOU COUNTY	SISK	9923254
SOLANO COUNTY	SOLA	9923255
SONOMA COUNTY	SONM	9923256
STANISLAUS COUNTY	STAN	9923257
SUTTER/YUBA COUNTY	SUTY	9923258
TEHAMA COUNTY	TEHA	9923259
TRINITY COUNTY	TRIN	9923260
TULARE COUNTY	TULA	9923261
TUOLUMNE COUNTY	TUOL	9923262
VENTURA COUNTY	VENT	9923263
YOLO COUNTY	YOLO	9923264