

# New UC Berkeley Management Codes Structure

(updated: 6/17/13)

## To remain:

The following existing management codes will remain unchanged.

Management Code	Purpose	Comments
3DCFAC	Endowed Chair payout – Scholarly Allowance	Hewlett, Common Good Model Only
3DCRES	Endowed Chair payout – Multidisciplinary	Hewlett Only, for Multi-disciplinary
3DCSTU	Endowed Chair payout – Grad Student Support	Hewlett, Common Good Model Only
3ZACOM	Commencement	

## To be phased out:

The following management codes will be phased out effective **July 1, 2013**.

Please refrain from creating new codes in these series, and start the process of retiring the values that are in use in these series in your Division. We understand that there may be a need in your Division to continue tracking existing funds in these code series; therefore, we will not be inactivating these values at the moment.

Management Code	Purpose
3CXXxx	Classroom Improvements
3DCAMP	Campus Capital campaign
3EXXxx	CRCC Awards
3LXXxx	Limited Purpose
3RXXxx	Committee on Research
4AXXxx	Stem Cell Activities
5AXXxx	Stem cell: Non Registry

## To be replaced:

There are presently over 1,000 management codes in use relating to Faculty Start Up, Retention and Recruitment. The following series will be removed from the list of campus Management Code values, and will be replaced with a single shared value for each of startup, retention and recruitment. These new shared values are already available for planning in CalPlan.

### Your Division should take the following **actions**:

- **Start** using the new shared code values for any new recruitment, retention or start up packages. (Do not set up any new codes under the old series.)
- **Start** using the new codes for any future expenses, and for planning purposes.
- **Stop** using the codes in the old series - any expenses for FY14 should be on the new shared values.

## Important:

We are planning to centrally move chartfield balances on any code in the old series for recruitment, retention, and start up to the new shared values. We are currently prioritizing chart of account changes related to other projects and cannot yet determine a date for the movement of chartfield balances related to the new management code series. We will communicate the expected completion date sometime in the fall FY2014.

Retiring Management Code Series	Purpose	New Shared Value Management Code
3SXXxx, 4SXXxx, 5SXXxx	Faculty Start-up	3S00MC
3TXXxx, 4TXXxx, 5TXXxx	Faculty Retention	3T00MC
3UXXxx	Faculty Recruitment	3U00MC

Please note that the use of 3U00MC is optional - if you would like to track expenditures relating to faculty recruitment, please use this shared value.

## To be added:

New Shared Values: Combining Endowed Chair and Start Up and Retention Management Codes

In testing our new shared value management code strategy, we realized that there is a need on campus to track both the intended use of the endowed chair funds, as well as whether those funds are used as part of a retention or start up package. In this case, there is a need for 2 CF1 codes! We have created the 6 management codes below to use in those cases where the funds from an endowed chair are also used as part of a retention or start up package.

Management Code	Purpose	Comments
3S0FAC	Endowed Chair payout – Scholarly Allowance, <b>when used as part of a start-up package</b>	Hewlett, Common Good Model Only
3S0RES	Endowed Chair payout – Multidisciplinary, <b>when used as part of a start-up package</b>	Hewlett Only, for Multi-disciplinary
3S0STU	Endowed Chair payout – Grad Student Support, <b>when used as part of a start-up package</b>	Hewlett, Common Good Model Only
3T0FAC	Endowed Chair payout – Scholarly Allowance, <b>when used as part of a retention package</b>	Hewlett, Common Good Model Only
3T0RES	Endowed Chair payout – Multidisciplinary, <b>when used as part of a retention package</b>	Hewlett Only, for Multi-disciplinary
3T0STU	Endowed Chair payout – Grad Student Support, <b>when used as part of a retention package</b>	Hewlett, Common Good Model Only