**CoA Overview**

# Non-sponsored CoA values

Requests to make changes (add new values, make changes, disable, or re-enable existing values) to the following segment types, value types, and ranges may be made through the Chart-Security Maintenance Application (CSMA) as long as the change is permitted by the user’s CSMA responsibility:

|  |  |  |
| --- | --- | --- |
| **Segment Type** | **Value Type** | **Ranges** |
| ORG | All | All |
| FUND | Parent, Budget-Only | All non-sponsored |
| FUND | Child | All non-sponsored |
| ACTIVITY | Parent, Budget-Only | All non-sponsored |
| ACTIVITY | Child | All non-sponsored except Construction in Progress (CIP) activities, which can only be requested by the Office of Fixed Asset Accounting (OFAA) |
| SUBACTIVITY | Budget-Only, Child | All non-sponsored |
| ROOT | All | All |
|  |  |  |

# Sponsored values

All requests to add, modify, disable, or re-enable child values in the sponsored fund, activity, and subactivity ranges are generated by changes to sponsored projects tracked in the GMAS system. When changes to the chart of accounts values associated with the sponsored projects are entered in the GMAS system, GMAS saves these changes and submits them to CSMA four times daily. For more detail on sponsored CoA values, contact your tub’s representative in OSP.

# Object segment values

Requests to add, modify, disable, or re-enable all object segment values are submitted to CSMA by the Client Services department, based on instructions they receive from Financial Accounting & Reporting (FAR). Tubs wishing to communicate a need to create a new object, or make changes to those that exist, should contact Karen O’Rourke (karen\_o’rourke@harvard.edu) FAR. For requests to add new codes, the following information should be provided:

* the approximate super parent range in which the proposed value would fall
* the name of the proposed code
* the business purpose served by the code as well as an estimation of the annual dollar amount of transactions, and
* any restrictions on its use.

# Tub segment values

Because of the enormous complexity associated with adding, disabling, or re- enabling tub segment values, those requests should be directed in writing to Financial Accounting & Reporting (FAR), care of Karen O’Rourke (karen\_o’rourke@harvard.edu). Requests to modify the description or attributes associated with an existing tub value may be directed to Client Services (csrequest@harvard.edu) with a copy to Karen O’Rourke (karen\_o’rourke@harvard.edu).