Job Aid

Establishing New Account Codes on Sponsored Projects for Certified Approvers

In establishing new account codes in PS, the Certified Approver (CA) will still continue to follow the same steps as outlined in the CA’s Best Practices Library job aids entitled, “Rebudgeting for Certified Approvers” and “Rebudgeting and F&A adjustments” except as noted below. When establishing new account codes on sponsored projects it is critical to be familiar with the particular sponsors terms and conditions since they may include restrictions for certain expenses, rebudgeting, prior approval requirements, etc. All need to be considered before approving the establishment of a new account code. In some cases it could require prior sponsor’s written approval before an account code can be set up.

**Required Steps for new account codes on Sponsored Projects**

Check account balances and confirm funds are available in applicable account lines. There are only two cases where a new account code can be set-up with zero dollars: 1) if an award is currently in preaward status or 2) a fixed price, industry-sponsored clinical trial.

Ensure that the rebudgeting to the new account code is allowable according to sponsor guidelines. This information can be found in sponsored guidelines and/or the NOGA. If further guidance is required contact your GA in SPA.

If rebudgeting is between F&A exempt and non-exempt account codes please follow the “Rebudgeting and F&A Adjustment” job aid.

In performing net-rebudgeting tasks in PS click the plus icon to insert a new row of data for each budget line you wish to add.

Enter the appropriate chart field information reflecting the new account code being added and the dollar amount.

Verify the data entry was successful.

**The following rebudgeting requests must still be completed by SPA:**

- Rebudgeting into and out of account code 810800
- Rebudgeting between projects

**Valuable Resources:**

Link to Rebudgeting for Certified Approvers and Rebudgeting and F&A Adjustments:
http://www.oar.umn.edu/CA/document_routing_EFS.cfm

Sponsoring agencies guidelines

Your SPA Grant Administrator