

**For a Miscellaneous Code**

REQUIRED INFORMATION			
PI/PD NAME:		SPONSOR NAME:	
DEPARTMENT NAME:		PROGRAM OFFICER NAME:	
BFR CODE:	PROGRAM ATTRIBUTE*:	START DATE:	
RESPONSIBLE ADMINISTRATOR:		END DATE:	
Activity Type (For Definitions, see Cost Object IV.A.3 online at: <a href="https://finance.duke.edu/accounting/glaccts/overview.php#iv">https://finance.duke.edu/accounting/glaccts/overview.php#iv</a> )			
<input type="checkbox"/> <b>4B91</b> : INSTRUCTION & DEPT. RESEARCH	<input type="checkbox"/> <b>4B92</b> : TRAINING PROGRAMS	<input type="checkbox"/> <b>4B93</b> : SPONSORED RESEARCH	<input type="checkbox"/> <b>4B94</b> : LIBRARIES
<input type="checkbox"/> <b>4B95</b> : STUDENT SERVICES	<input type="checkbox"/> <b>4B97</b> : GENERAL ADMIN/OPERATIONS	<input type="checkbox"/> <b>4B98</b> : STUDENT AID	<input type="checkbox"/> <b>2/399</b> : SPECIAL PROGRAMS
PROJECT TITLE:			
DESCRIPTION:			

Miscellaneous accounts (39x) are established for external funds that require no financial reporting and are received through mechanisms other than the standard proposal and award process. Examples include all gifts, conference and symposium fees for events sponsored by Duke, editorships, class gifts, executive education programs, and corporate scholarship programs.

Please provide the information requested above and the signatures below:

PI/PD: \_\_\_\_\_ Date: \_\_\_\_\_

Department Chair/Dean: \_\_\_\_\_ Date: \_\_\_\_\_

Business Manager: \_\_\_\_\_ Date: \_\_\_\_\_

ORS Approval:

\_\_\_\_\_ WBS: 2/39 \_\_\_-xxxx F&A \_\_\_\_\_ % Date: \_\_\_\_\_

\*See page 2

PROVOST AREA COST OBJECT REQUEST ADDENDUM		
SE CIRCLE OR UNDERLINE THE PROGRAM ATTRIBUTE THAT BEST DESCRIBES THE FUNCTION PERFORMED WITHIN THE FUND CODE.		
CODE	DESCRIPTION	ATTRIBUTE DESCRIPTION
<b>Reserves</b>		
RDF	Discretionary Reserve	Discretionary funds to support activities and to backstop operations (e.g. Dean's reserve, Provost's reserve)
RDP	Department/Program Reserve	Discretionary funds to support program activities. The program directors or operating unit directors manage these funds.
RDS	Dean's Strategic Funds	Yearly appropriation allocated from the endowment spending policy to support the school's strategic initiatives.
RDO	Designated Operating Reserve	Funds to support operational backstops for unanticipated budget variances.
RMA	Minor Acquisition Betterments Reserve	Funds reserved for purchase of minor acquisition betterments of \$5,000 or less.
RCB	Capital Betterments Reserve	Funds reserved for purchase of capital betterments greater than \$5,000.
<b>Research</b>		
FDR	Faculty Discretionary	Funds received from the school or external sources to provide unrestricted support of the individual's academic and research activities.
FSR	Faculty Start-Up	Funds received from the school, faculty enhancement initiative and/or other external entities to provide support of start up/instrumentation costs.
<b>Programs</b>		
PSU	Start-Up Program	Funds to support the launch of a new program or initiative.
OPX	Other Programs	Funds received from the school or external sources to provide support of operational / organized activities of an existing program
RMG	Restricted Multi-Year Gifts	Multi-year gifts from donors for specific programs or activities.
<b>Endowments</b>		
ENP	Endowment Professorship	Endowment received in support of a chair professorship
	<b>Endowment Financial Aid/Scholarships</b>	Endowment received in support of providing aids to students in the form of scholarships, fellowships, and stipends.
EUA	UG Student Financial Aid/Scholarships	Financial Aid - Undergraduate Aid - Need Endowments
EUM	UG Financial Aid Merit	Financial Aid - Undergraduate Aid - Merit Endowments
EUO	UG Financial Aid Other	Financial Aid - Undergraduate Aid - Other Endowments
EGA	Grad/Prof Student Financial Aid/Scholarships	Financial Aid - Graduate or Professional Students
EPA	Professional Student Financial Aid/Scholarships	Professional Student Financial Aid/Scholarships
ENR	Endowment Operating Restricted	Endowment received in support of restricted operating
ENU	Endowment Unrestricted	Endowment received in support of unrestricted operating.
ENS	Endowment Operating Special Program	Endowment received in support of special program
EIR	Endowment Instr/Research	Endowment received in support of Instruction & Research
ENL	Endowment Library	Endowment received for Library support/acquisitions.
ENB	Endowment Plant & Maintenance	Endowment received in support of plant facilities and maintenance
LIA	Life Income Assets	This includes annuity funds, living trust gifts, and life insurance policy.
ENO	Other	Gifts that do not have a predominate purpose and for multi-purpose use.
EDQ	Endowment Quasi Dual	Quasi Endowment that allows principal withdrawal and distributes income
ESQ	Endowment Special Quasi	Special Quasi Endowment that allows principal withdrawal
EOQ	Endowment Quasi Other	Quasi Endowment that distributes income
<b>Spendable Endowments</b>		
ESL	Spend-End Libraries	Spendable endowment for Library support/acquisitions
ESP	Spend-End Professorship	Spendable endowment in support of a chair professorship
ESU	Spend-End Oper Unrestricted	Spendable endowment in support of unrestricted operating
ESR	Spend-End Oper Restricted	Spendable endowment in support of restricted operating
ESS	Spend-End Oper Special Program	Spendable endowment in support of special program
ESI	Spend-End Instr/Research	Endowment received in support of Instruction & Research
ESB	Spend-End Plant & Maintenance	Spendable endowment in support of plant facilities and maintenance.
EQS	Spend-End Quasi	Spendable Quasi Endowment
SUA	Spend-End Fina Aid UG Need	Spendable endowment in support of financial aid UG need
SUM	Spend-End Fin Aid Merit	Spendable endowment in support of financial aid UG Merit
SUO	Spend-End Fin Aid UG Other	Spendable endowment in support of financial aid UG Other
SGA	Spend-End Fin Aid Grad/Prof	Spendable endowment in support of Graduate and Professional financial aid and graduate financial aid reserves generally in a 4XX code.
<b>Plant Funds</b>		
WCL	Working Capital Loan	Working Capital Loan fund code.
PFN	Non-Capital Projects	Project cost of less than \$100,000 or for budgeted use of capital betterments.
PF1	Tier I Capital Projects	Project cost of \$100,000 but less than \$250,000
PF2	Tier II Capital Projects	Project cost of \$250,000 but less than \$2.5 million.
PF3	Tier III Capital Projects	Project cost of \$2.5 million or greater.
<b>Sponsored Grants and Contracts</b>		
SRF	Sponsored Grants & Contracts Federal	All activities supported by federal grants and contracts. (2xx - 34x)
SRS	Sponsored Grants & Contracts State	All activities supported by state grants and contracts. (35x)
SRN	Sponsored Grants & Contracts Non-Govern	All activities supported by non-government grants and contracts. (38x, 39x)
<b>Other</b>		
SCO	Service Components	Operating units that provide goods or specific technical or administrative services within the University community.
		Self supporting activities, primarily serving students, faculty, and staff by providing goods and services
AUX	Auxiliary	for a fee or sales price related to the cost of goods and services (e.g. Duke University Press)