

ADJUSTING TRANSACTION CONTROLS TO MAKE ALL CAPITAL EXPENDITURE TYPES NON-CHARGEABLE

PROCEDURE

1. The Property Management Office determines that capital equipment should not be charged to the award and communicates this decision to OSR.
2. The OSR set-up accountant modifies the transaction controls on the project to make all SU-owned and Non-SU owned expenditure types non-chargeable by referring to the table below.
 - a. Procedures for adding/deleting project transaction controls are at *Add or Delete Project Transaction Controls – “Limit To Transaction Controls” box is not checked*
3. After all transaction controls have been adjusted, run the RM3 180 PTA Configuration report to verify the project transaction controls were correctly updated

MAKING CAPITAL EQUIPMENT EXPENDITURE TYPES NON-CHARGEABLE

Only the capital exp types where the transaction controls change are listed below.

For all capital exp types, see the spreadsheet **TRANSACTION CONTROLS AND CAPITAL EQUIPMENT – STANFORD VESTING (SU Default) and NON-STANFORD VESTING (Non-SU)**.

	Project Templates	SP_T_FED% and SP_T_STATE%	SP_T_NON_FED_NO_A21
EXP TYPE	DESCRIPTION	Federal, State and Local Government Awards	Non- Federal Awards (excludes State of CA and Local Governments)
53110	SU CAP OFFICE FURNITURE		Add TC
53115	SU CAP SCIENTIFIC TECH EQUIP	Add TC	Add TC
53120	SU CAP COMP EQUIP	Add TC	Add TC
53160	SU CAP OTH EQUIP 5 YR LIFE		Add TC
53175	SU CAP EQUIP UPGRADE EXPANSION	Add TC	Add TC