The Crosswalk Tool was developed to create a user friendly “crosswalk” between elements of the old Chart of Accounts (Chart 1) and the new Patriot Chart (Chart P). No login information is required to access the Crosswalk Tool; however, users must be connected directly to a Mason Network or remotely through VPN. More information about VPN access is available on the ITS – VPN webpage. Additional information about the COA Redesign project and Chart Elements are available at https://coa.gmu.edu/.

If a FOAPAL element is not cross walking the way you expected please reach out to your Accountability Project Partner for guidance.

Crosswalk Tool Link: https://ssbextsbity.gmu.edu/BannerExtensibility/customPage/page/GMUCOALookup

Searchable Chart Elements

**Chart 1**: The legacy financial accounting structure that contains historical data for FY07 through FY22.

**Chart P**: The new financial accounting structure that begins on July 1, 2022 (FY23).

- **FUND**: Where the money originated. Different sources of funding (E&G, Grants and Contracts, Capital Budgets, Restricted Endowments, etc.) have different rules.
- **ORG**: Who is responsible for the financial activity. Organizational units or departments are represented by a unique Org number.
- **ACCT**: What the money originated as (e.g., tuition, appropriation, fees) or what the money is being spent on (salaries, supplies, travel).
- **PROG**: Why the money is being spent. Represents the function of the University that the transaction supports.
- **ACTV**: An optional segment that can be used fairly flexibly to track work within or across the organization(s)

How to Use and Interpret Results

1. Select a Chart of Accounts (1) or (P) to begin. If you know the Chart 1 element, select Chart 1.
2. Select the FOAPAL element to search. (FUND, ORG, ACCT, PROG, ACTV)
3. Enter the FOAPAL code to create the crosswalk. For example, ORG – 421701.
4. Click the Lookup button and review results.

6. Chart P ORG to Chart 1 Crosswalk. New Org M16224 replaces both old Org 421501 and 421505.

7. Chart P ORG to Chart 1 Crosswalk. Example of “No matching records found” when a new element was created for Chart P where a Chart 1 element did not exist. New Org M19691 = Fiscal Policy and Communication was created in Chart P but there was no Org for Fiscal Policy and Communication in Chart 1.

8. Chart 1 Org to Chart P Fund. Most Self-supporting Orgs have been converted to Funds. The highlight will appear when an element has changed. The Fund is still tied to an Org; however, the Fund is the element that is considered data enterable and would be used to capture revenues and expenses.
9. Chart 1 Sponsored Fund to Chart P Sponsored Fund. The Fund number for sponsored projects is consistent.

10. Chart 1 Account to Chart P Account. Many Account codes have been grouped and consolidated. The example below for office supplies 74120 show the consolidation of the Chart 1 elements.

Things to Know

➢ The Crosswalk Tool can only map data enterable FOAPAL elements. Users can search the Level 6 data, but not the entire hierarchy. For example, FA4A as a Level 4 Fund.
➢ The Crosswalk Tool is unable to perform a range look up. For example, FA4% or 770%.
➢ The Crosswalk Tool can only map current Chart 1 elements to newly created Chart P elements.
➢ Chart 1 Account to Chart P Account. Many Account codes have been grouped and consolidated. The example below for office supplies 74120 show the consolidation of the Chart 1 elements.
➢ Reversing the lookup, once you have the Chart P element, will show you the consolidation more clearly.

Additional resources and information are available on the Fiscal Training webpage. Training and resources specific to MicroStrategy are available on the BI Group webpage.