



# IUF-to-IU Quick Start Guide for 1-to-1 Account Mapping

The Office of the University Controller

## **Project Objective**

To meet the proposed goal of having a 1:1 account relationship between Indiana University (IU) and IU Foundation (IUF) gift accounts. The university requirement, as of July 1, 2025, will be to have only one active IU restricted account for each IUF gift account. Establishing this 1:1 account relationship will enable real-time reporting, enhance fund utilization through targeted spending strategies, and pave the way for potential automation of reimbursement processes.

## **New Account Creation**

For creating new accounts needed to satisfy the 1:1 IU-IUF account requirements, please reference the following guidelines for each fund purpose:

- [IU Foundation Scholarship Account Guidance](#)
- [IU Foundation Research Account Guidance](#)
- [IU Foundation Faculty-Staff Support Account Guidance](#)
- [IU Foundation Capital Gifts and Acquisitions Account Guidance](#)
- [IU Foundation General and Multipurpose Account Guidance](#)

The account use code on the IUF account determines which guidance is applicable. If unsure of what guidance applies, see Appendix A below.

## **Updating Existing KFS Account Link to IUF Account**

For accounts that already exist and just need to be linked to the corresponding IUF account, the only step that departments need to do is the linking of the two funds. There are two options for completing this step:

1. Create a spreadsheet list that includes both the KFS account number and the IUF account number and have the campus controller submit to UCO for a batch update by sending to Jenny Spors-Hill at [jspors@iu.edu](mailto:jspors@iu.edu). These are currently being updated monthly. *(Preferred method if no other edits needed.)*  
OR
2. In KFS, add the IUF Account Number to the “Corresponding IUF Account” field for an account in KFS. IUF will run a report against this field to update the link in the FEM table. *(Use if other edits are being made at the same time since it requires routing for approvals.)*

All other account attribute updates (e.g., sub fund group code, higher ed function code) for existing accounts that do not require new account creation can be updated by UCO via batch.

## **For Item Type Changes Needed (applies to financial aid accounts only)**

- *Next Batch Update* – We plan to do another batch item type update with submissions due May 31, 2025 for the next fall billing cycle.
- *Additional Updates for Existing Item Types* – If you have updates to submit before next spring, you can email those to [uburreq@iu.edu](mailto:uburreq@iu.edu). Required fields are: Campus, Item Type, Account Number, and Object Code.

- *Requesting New Item Types* – If you need to request a new item type for an account number and object code combination that did not already exist, you can fill out the request form via Financial Aid. Those with FA access can use [this link](#) to find and complete the form. New item type setups are automatically routed to the Bursar.
- *Inactivating Item Types* – If you have additional item types that you would like to have inactivated, you can email that request to University Financial Aid at [usssfa@indiana.edu](mailto:usssfa@indiana.edu). Please include Campus(es) and Item Type number.

### **Account Linking Update Process (Back End)**

IUF will run a report to query KFS and compare values to update the FEM table of links. As IU continues to populate the IUF Corresponding Account Number field, IUF will continue to update the FEM table of links via this method. IUF will seek to identify conflicting data and reach out with issues that need to be resolved.

*IUF Corresponding Account Number (IU KFS field) = Account Number (IUF FEM field)*

*Account Number (IU KFS field) = IU Benefitting Account (IUF FEM field)*


### **Budgeting for IUF Accounts**

Refer to the [UBO website](#) for most up-to-date instructions on budgeting for IUF accounts.

## Appendix A – How to find Account Use Code for an IU Foundation Account

1. Go to [IU Benefitting Account Search - Summary](#) and login. If you do not have FEM access, you will need to request it by clicking [HERE](#) and following the instructions shown.
2. Enter the FEM Account Number (IUF account number) of the fund.

[\\_About This Report](#) [\\_IU Benefitting Account Searc...](#) [\\_Glossary](#)

 **INDIANA UNIVERSITY  
ADVANCEMENT**

Filters  
X

Filter Selections || FEM / Account: 0320016243 - John Mellencamp Sculpture Fund | KFS / Account: 0320016243 - John Mellencamp Sculpture Fund | FEM Expects a Link to a KFS Account?: Y | KFS Link to FEM Type: All | IU Campus: All | Unit: All | IU Chart: All | IU Organization: All | IU Responsibility Center: All | FEM / IU Benefitting Account: All | Account Type: All | Account Use: All | IU Match (List): All | Account Funded Solely by Unrealized Planned Gift?: All | Transaction Restriction (NDISB or NTRAN): All | Account Closed?: All

[FEEDBACK](#)  
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### IU Benefitting Account Search - Summary

FEM / Account 0320016243 - John Mellencamp Sculpture Fund	IU Responsibility Center 98 - VP CAPITAL PROJECTS & FACILITIES
KFS / Account (List) 	FEM / IU Benefitting Account 
FEM Expects a Link to a KFS Account? Y	Account Type 032 - Discretionary Accounts - Unrestricted IU
KFS Link to FEM Type Link not attempted in KFS or FEM	Account Use CR - Construction With Some Restriction
IU Campus BL - Bloomington	IU Match (List) 
Unit IU02 - Indiana University Office of Capital Projects and Facilities	Account Funded Solely by Unrealized Planned Gift? N
IU Chart UA - UNIV ADMIN	Transaction Restriction (NDISB or NTRAN) 
IU Organization VPAD - CAPITAL PLANNING & FACILITIES	Account Closed? N

3. Look up the Account Use Code in the [IU Foundation Purpose Group Definitions and Account Use Codes](#) table to see which phase/guidance applies.