RCM and the F&A Allocation

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Sponsored Projects Services
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RCM F&A

• RCM - Responsibility Centered Management
• F&A - Facilities and Administration (Indirect Costs)
• RCU – Responsibility Centered Unit
• UAR- UAcess Research
UAR Upgrade

- UAR upgrade completed end of May 2015
- Award Hierarchy is a new function of UAR
- New terminology – node, root award id, IA
- SPS has entered historical entries for all sibling accounts, default set-up by PRS splits
- Integrated subject area requires strict SPS process for establishing awards
- SPS can accommodate various options for F&A splits
- Accuracy is paramount, incremental data loads
What has changed with F&A?

• Data available via dashboard, calculation is automated
• Sliding Scale eliminated, straight 25% allocation
• Special Allocations eliminated
• RCU Groups - College and Related receive allocations, others received a budget
• Balance of F&A is included in the RCM “true up” process
F&A Fiscal Year

F&A FY2016
- 4th QTR 2015 (6/30/2015)
- 1st QTR 2016 (09/30/2015)
- 2nd QTR 2016 (12/31/2015)
- 3rd QTR 2016 (03/31/2016)

F&A FY2017
- 4th QTR 2016 (6/30/2016)
- 1st QTR 2017 (09/30/2016)
- 2nd QTR 2017 (12/31/2016)
- 3rd QTR 2017 (03/31/2017)
Dashboard Locations

RCM/RCM – Auto w/Analytics

- RCM Sponsored F&A
  - Fiscal Year 2016+
  - Fiscal Year 2015 actual using sliding scale, RCM model

Research/Trending – Research/Medium

- Quarterly Allocation by F&A Fiscal –Summary
- Quarterly Allocation by F&A Fiscal Year - Details
  - Fiscal Year 2016+, actual allocation
  - Prior Fiscal Years for trending only (ballpark - does not represent actual activity)
Dashboard – filter by root award id
Dashboard Graph – compare multiple fiscal years
Allocate by sibling account (100% to account owner)

<table>
<thead>
<tr>
<th>College Code</th>
<th>College Name</th>
<th>Current YR RCU Group</th>
<th>Current YR RCU Group</th>
<th>Split Organization Code</th>
<th>Split Organization Name</th>
<th>Account Number</th>
<th>Account Organization Code</th>
<th>Indirect Cost Rate Percentage</th>
<th>Award Id</th>
<th>Award Version Number</th>
<th>Investigator Name</th>
<th>Investigator Name</th>
<th>F&amp;A Revenue Percentage</th>
<th>Indirect Cost Recovery Expense QTD by F&amp;A</th>
<th>25% of F&amp;A Expense QTD by P&amp;A</th>
</tr>
</thead>
<tbody>
<tr>
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<td>College of Agric and Life Sci</td>
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</tbody>
</table>
Filter by Investigator – check filters in case there is activity beyond the College and Related Group
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