Special Topic: UCPath Funding Roll Over
DOM Research Administrator’s Meeting

JULY 8, 2021
Agenda

- Timeline
- Hints & Tips
- Steps to Creating Responsibility List
- Review
- FAUs
- Reminders
  - Staff
  - Faculty
UCPath Funding Roll Over Timeline

► June 24 – Start MCOP/Faculty Roll Over
► June 25 – Complete MCOP/Faculty Roll Over
► June 28 – Start Staff Roll Over
► June 30 – Complete Staff Roll Over
► July 14 – Bi-Weekly Deadline*
► July 26 – Monthly Deadline*

*approved & completed within UCPath
Hints & Tips

► Start with Staff
► Gather all your C&G budgets
► **Meet with your PI**s to discuss potential changes in funding distributions
► **Discuss with your MSO**
  ► Dept & Division & State FTE (19900) unrestricted funding
  ► Potential salary increases in total negotiated salaries (TNS) for your faculty
► Review FY22 Clinical effort in the \OData:_UCPath Default FAU folder
► Complete the [MCOP worksheet](#) to help you draft faculty funding updates
1. Create Review List

1) Run **UCPath Salary & Percentage by Month** by **Organization** in QDB or DG Inform for a report of **all PI’s personnel**. Enter...
   a) Dept Code
   b) All PI’s cost centers; * for all other fields
      - If you’re unsure which cost center’s belong to your PIs, look up in Jump Server’s FPM
   c) Date range: July 2020 – July 2021

2) Run **UCPath Salary & Percentage by Month** by **Employee for PI** to obtain his/her full funding profile
   a) Search by PI name
   b) Leave everything else * (no cost centers), same date range as 1c
1. Create Review List

► If you use **DG Inform**, you can skip step 2!
► Make sure you add “Additional Columns”
2. Obtain Position # List

1) Run **UCPath Empl Sum** by Organization in QDB to obtain for report each personnel’s Position #. Enter...
   
   a) Dept Code
   
   b) All PI’s cost centers; * for all other fields
   
   c) Date range: June 2021 – July 2021 - **EARNED** (only need 1 month)
3. Discuss with PI & MSO RE: any possible changes for FY22

1) Now equipped with list of all staff paid by PI, ensure there are no changes to staff salaries

2) Be aware of any potential TNS increases

3) Review PI’s funding distribution by consulting with
   a) PI: to ensure no effort changes
   b) C&G budgets: to sure efforts match Sponsor effort
   c) MSO: to discuss any 19900/FTE, unrestricted Dept/Division fund coverage, including OTC-Y
4. Review all Funding Distributions in UCPath

1) UCPath > Funding Entry > Add a New Value > Enter Dept Code > Copy & Paste Position # > “Add” > Review funding distribution & make edits as necessary

a) Staff Funding Updates
b) MCOP Faculty Funding Updates
UCPath Unrestricted FAUs

► Work closely w/MSO to confirm funding sources & amts

► FTE
  ► 401026-1A-19900 (MD Clinicians)
  ► 401026-1C-19900 (PhD Basic Scientists)

► Clinical & Non-Clinical
  ► 461028-1A-62165 (clinical effort) ***NEW***
    ► prior to FY22 401028-1A-62165
    ► % from Division’s Faculty Clinical Spreadsheet
  ► 401028-1C-62246 (non-clinical) ***NO CHANGE***
    ► Miscellaneous + Over-the-Cap (OTC)

► Default FAU remains unchanged: 4010_ _-UC-62165
  ► Account #s are Division specific
  ► 100% clinical faculty use 461028-1A-62165-DFLT
Reminders – Staff

► Enter appropriate Funding Effective Date, the date should be no later than 07/01/2021 (see next slide)
► Do NOT add Funding End Dates
► Don’t forget the Sub 02 Override for non-academic staff, if applicable
► Do NOT enter Earn Code (“Ern Cd”). Leave blank!
► Review the actual project period end dates of all funds you will be using
Reminders – Staff & Faculty

- Be aware of processing dates
  - For Bi-Weekly (BW2) you can use as early as 06/27/21
Reminders – Faculty

- Best practice is to keep all Begin Dates 07/01/21 & End Dates 06/30/22
- Make sure you run all the Division OTC unrestricted funding by your MSO
- Try to maximize 19900 (only in HSR) funding, whenever possible. Confirm amount with MSO!
  - See 19900 Calculation spreadsheet
- Use budgeted % effort to complete MCOP whenever possible so ERS/progress reports are consistent
- Confirm the appropriate Cap Rates are being used in MCOP
Reminders – Faculty Part-Time Appointments

- If your PI’s Full Time Equivalent (FTE) is < 100%, make sure to update prorated efforts accordingly in UCPath
- Use Part-Time Faculty spreadsheet to assist

![Compensation Data Snapshot](image-url)
Reminders – Faculty Funding Distribution Preview

► Don’t forget to update the Default FAU (UC-62165) for OTC-Y
Reminders – Faculty Funding Distribution Preview

► Be aware of ANY under funding where the Default FAU (UC-62165) is included in the funding distribution (red box), with an Earn Code

► This is an indication you under funded your PI’s distribution

► Remember FTE/19900 funding can be used as OTC-Y for HSR earn codes only (highlighted in yellow).

► Make sure you do not go over your PI’s 19900 FTE maximum
Summary: What to Review For...

- Funding distribution is accurately represented in UCPath
- No blank funding distributions/MCOP Worksheets
- No UC-62165 FAUs listed in any line funding lines*

Staff
- No earn codes are listed
- No funding end dates
- Sub 02 override for applicable staff titles

Faculty
- MCOP worksheet complete with NO UC-62165* in funding distribution
- 100% clinical faculty have updated default (w/DFLT project code) & MCOP worksheet with 461028-1A-62165

*except on the landing page of MCOP faculty