

UPDATING MCOP FACULTY FUNDING IN UCPATH

Revised July 17, 2020

Updating MCOP Faculty for FY21 with C&Gs, 19900, and 62165/62246 Split

PRIORITY OF FUND USE*

1. Contract & Grant funds
2. 19900 FTE, if applicable
3. Other Funding Sources (e.g. gifts, endowments, Dean's Office commitments, etc.)
4. 62165 max
5. 62246 balance

**Disclaimer: This priority list is a general rule. Not all funding sources will be available to every faculty member. Please be sure to check with your PI and MSO to determine if specific funding sources have a higher/lower priority.*

PREP-WORK

1. Run a QDB download of payroll earned for June 2020. Use this as a starting point to determine the C&G funds to be charged for FY21.
 - a. Are there any changes to C&G funds for July 2020? Has a grant ended, or a new one been awarded? Are the %s of effort charged still accurate?
 - b. Create a new column at the end of the QDB download for the FY21 % effort distribution. Add a Subtotal Line. Add a line for the % to charge to 62246 (100 minus Subtotal). Add a Total line to confirm total is 100%. Enter the C&G % salary in the new FY21 column.
See example on Page 3 of this guide
2. Use the [19900 FTE Calculation worksheet](#) to determine the max \$ allowed to be charged to 19900
 - a. Be sure to use the updated FY21 worksheet (updated with new CBR rate of 37.4%)
 - b. For funding updates with a start date of 07/01/2020, column M "Salary Charged to-date on 19900 in Current FY" will be \$0
3. Are there any other funding sources to be used FY21, e.g. gifts, endowments, etc.? If so, add the funding source to the QDB download, and include the % to be paid in the FY21 column
 - a. **Check with MSO:** Faculty may be receiving monies you are unaware of, e.g. \$ for serving on a campus committee (IRB, ARC, Dean's Office commitments, other funding with an end date)
4. Review Albert's 62165/62246 split spreadsheet (located in the Funds/DivName/_UCPath folder) to determine the max % allowed to be charged to 62165
 - a. **Check with MSO:** Can this faculty charge any portion of their salary to 62165/62246, i.e. does this faculty have a salary commitment, or does the faculty generate clinical revenue?
 - b. If allowed to charge, enter 62165 max % on the QDB download for the FY21 distribution

UCPATH UPDATE

5. UCPATH MCOP Worksheet:
After each step below, check if you are at 100% in the "Percent of Effort" column. If not, go onto the next step to include additional funding

Leave Earn Codes blank. 19900 will automatically distribute to HSR (base) upon submitting to the Funding Distribution Preview

- a. Enter the C&G funds – Step 1: under the “Percent of Effort” column
 - b. Enter the 19900 \$ max – Step 2: under the “Total Allocated Amt” column. Tab out and then UCPath will auto-calculate the “Percent of Effort” column. Enter this amount in the QDB download for the FY21 distribution
 - c. Enter any additional funding – Step 3
 - d. Enter the 62165 % max – Step 4: under the “Percent of Effort” column
 - e. Enter the 62246 % based on the balance needed to get to 100% effort distributed from the QDB download.
6. Funding Distribution Preview:
- a. At this point, the funding for 19900 and 62165 should already be maxed out. Therefore, all OTC funding lines should be updated to use 62246 funding (as long as the faculty is allowed to charge salary to this fund, see Step 4a)
 - b. Double check all of the funding distribution lines for accuracy. Also check the FAU Monthly Preview report for help determine funding distribution accuracy. Make any adjustments, as need before sending “Submitting to Funding Entry”
 - c. Make sure you do **not** see UC-62165 on any of the lines prior to clicking “Submit to Funding Entry”. If you see UC-62165 in a non-editable line, click “Return to Salary Cap/MCOP Funding Worksheet” to ensure 100% of Percent of Effort has been distributed. If you see UC-62165 in an editable field, change the FAU to applicable unrestricted funding source to cover the cap gap.
7. Back on the Funding Entry page, be sure to add a robust description, so that the Approver knows what you were trying to accomplish with the Funding Entry update.
- a. Be sure to upload any backup documents as attachments, e.g. Faculty Funding Update Template or the spreadsheet you used similar to the sample below

FAUs:

401028-1A-62165 – Clinical effort only. Check Albert's 62165/62246 for % max allowed on 62165.

401028-1C-62246 – Non-clinical, such a research

401026-1A-19900 – MCP Faculty (MD clinicians)

401026-1C-19900 – BSCP Faculty (PhDs)

SAMPLE QDB REPORT

QDB June 2020 download example. Items in highlighted in green were added by the fund manager. Do NOT use the 19900 or 62165 %s from June 2020 (items highlighted in light gray), as these will both need to be adjusted for FY21.

Account	CC	Fund	Project	202006	Total Salary	Percent FY21	Annual	Monthly
401026	1A	19900		0.43	0.43	25.085500	100,342	8,361
401045	1A	62125		0.17	0.17	5.000000		
441345	R1	31330		0.25	0.25	25.000000		
		31544		0.10	0.10	10.000000		
		57213		0.05	0.05	5.000000		
		57374		0.00	0.00	5.000000		
		Total Sum of Gross Earnings						
Total Sum of Paid %				1.00	1.00	0.000000		
SUBTOTAL						75.085500		
401045	1C	62246				24.914500		
TOTAL						100.000000		