



University of California
San Francisco

UCSF 2019-2020

F&A Space Component

Focus Group Training

UCSF Budget and Resource Management, Costing Policy

September 12 & 17, 2019

Agenda

1. Introductions and Overview
2. F&A Process
3. UCSF 2019 Survey Particulars
4. Cost Principles
5. Special Considerations
6. Functionalization Examples
7. System Operations
8. Recap
9. Next Steps
10. Q&A

Introductions

- F&A Survey Support
 - Budget & Resource Management : Darryl Lim, Morissa Gleichenhaus, Garret Jang
- Archibus Space System Administration
 - Real Estate, Space Analytics Team: Ritesh Khanna, Lisa (Lettau) Rolfsness, Bob Pizzi
- Dept Representation (responsible persons)
 - Coordinators
 - Other F&A Contacts: Dept Managers, Lab Managers, Financial Managers, Pls, etc.

“The responsible persons should be familiar with the Cost Principles academic functional definitions, have knowledge of the space and its occupants and have knowledge of the funding sources for the room occupants.”

-CAS Best Practices Manual and Review Guide January 2017

Overview

- Objectives
- Facilities and Administration (F&A) Rate Proposal
- Space Survey Purpose
- Space Survey Population and Significant Dates (Schedule)

Objectives

Goal

Develop a basic understanding of
*the value of the F&A Space Survey
and
*what is required to complete F&A
functionalization within Archibus

Approach

This training will provide:
* a Big Picture view of F&A
* and a description of the concepts, terms and
operations included in the F&A portions of the
space survey

Facilities & Administrative (F&A) Survey

- What is an F&A Survey?

An F&A survey is a way to identify how space is used for development of F&A rates.

- Why is an F&A survey needed now?

To collect data for the official (2019-20) based F&A proposal.

- Will this be done every year?

This year and next surveys are expected.

F&A functionalization is not expected to be included each year, application will be strategically reviewed and determined.

Why is the F&A Survey important for UCSF

- UCSF receives reimbursement for space (facilities) and administrative related costs based on a Facilities and Administrative (F&A) Rate
- F&A Rates base allocation of space (facilities) costs according to details of how space is utilized



- Space Allocation is based on either general department detail or specific departmental assignment
- Recovered costs are used to support building debt payment, operations and maintenance of facilities, sponsored project support and more
- Continued assessment of F&A space detail is necessary to optimize campus F&A rate(s) and related recovery

2019 F&A Survey Population

- Selected departments need to attend this session. Others are welcome, but not required.

	Division	Division Abbrev		Division	Division Abbrev
1	102004	M_Anatomy	12	140020	M_Neurology
2	115001	M_Biochemistry and Biophysics	13	123010	M_ObGyn, Reproductive Sciences
3	104014	M_Cardiovascular Research Inst	14	142060	M_Pathology
4	106028	M_CMP (Cellular Molecular Pha)	15	136200	M_PEDIATRICS
5	128045	M_Diabetes Center	16	133100	M_Psychiatry
6	112100	M_Epidemiology & Biostatistics	17	147100	M_Radiology
7	143100	M_HDF Comprehensive Cancer Ctr	18	114083	M_Regeneration Medicine
8	110058	M_IND (Neurodegenerative Dis)	19	148200	M_Surgery
9	138300	M_MEDICINE	20	334030	P_Bioengineering
10	129070	M_Microbiology and Immunology	21	333019	P_Pharmaceutical Chemistry
11	121085	M_Neurological Surgery			



Timeline for 2019 Space, F&A Survey

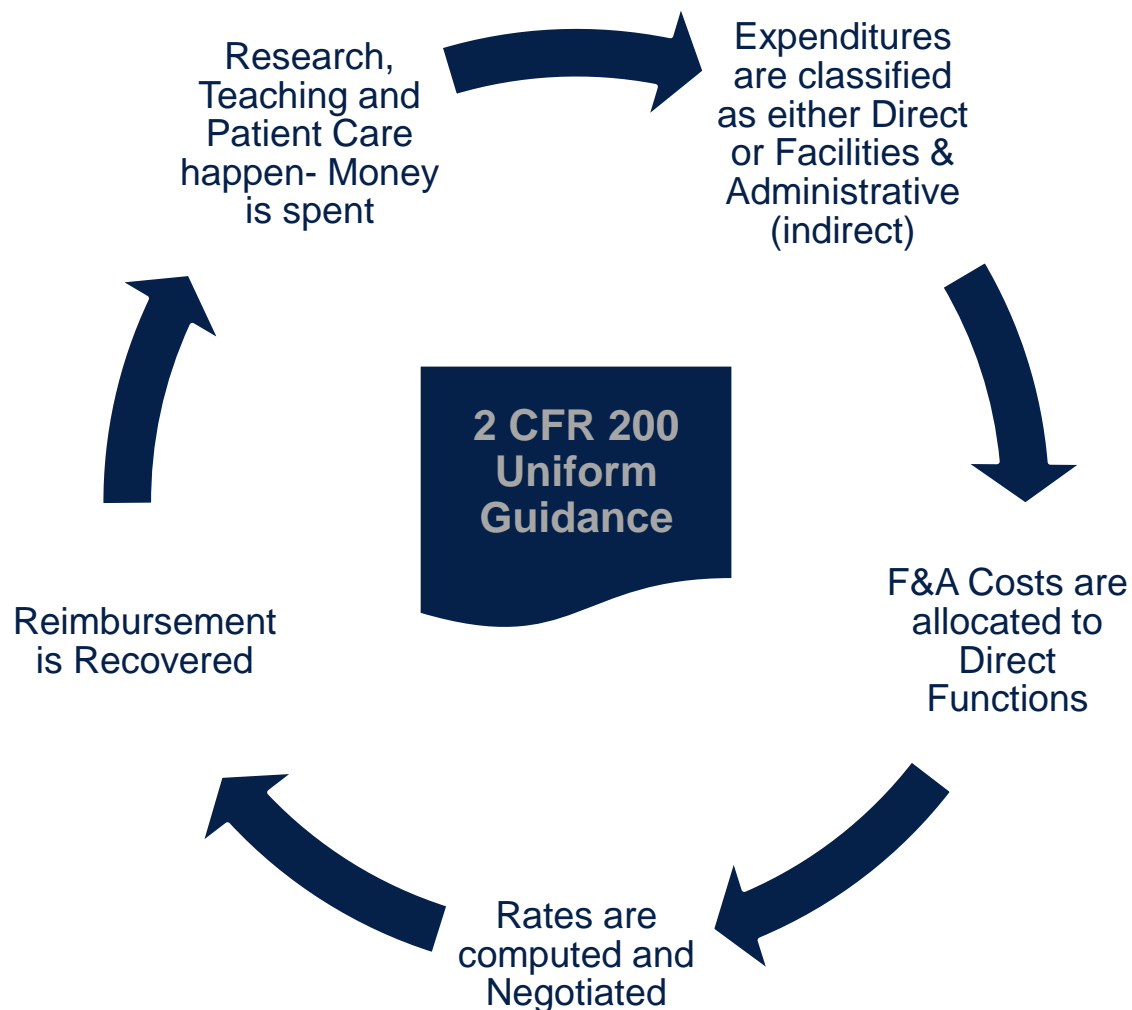
Date	Activity
Space Survey	
Sept 9 th 2019	Annual Space Survey begins
Nov 4 th 2019	Cut-off date for adding any new Space Coordinators
Nov. 22 nd 2019	Annual Space Survey ends (<i>Nov 1st for SoM</i>)
Dec 13 th 2019	UCSF Space Data will be reported to UCOP
F&A Component	
Sept. 9 th 2019	F&A Survey begins on this day
Sept 12th & 17th 2019	F&A Town Hall @ Parnassus and Mission Bay
Oct – Nov 2019	F&A Dept meetings will be scheduled with BRM Team
Dec 13 th 2019	F&A Survey Ends on this day for all end-users involved
Dec – Feb 28 th 2020	BRM Team review of F&A Survey

Start early to allow time for discussion with your department and any questions for System Admins and BRM Admins.

F&A Process

- Big Picture
- Video
- Bringing it Home

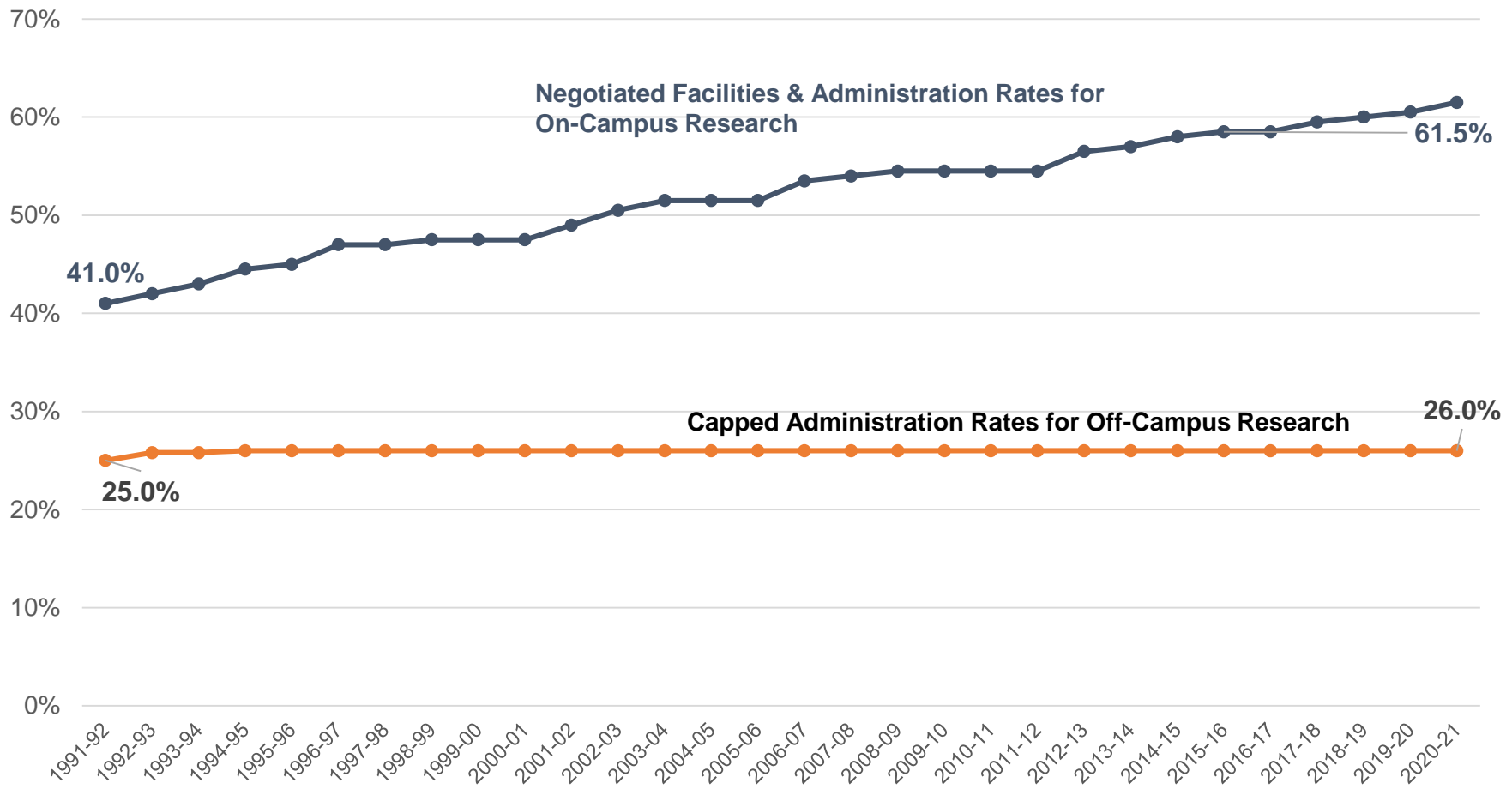
The Big Picture - Facilities and Administration



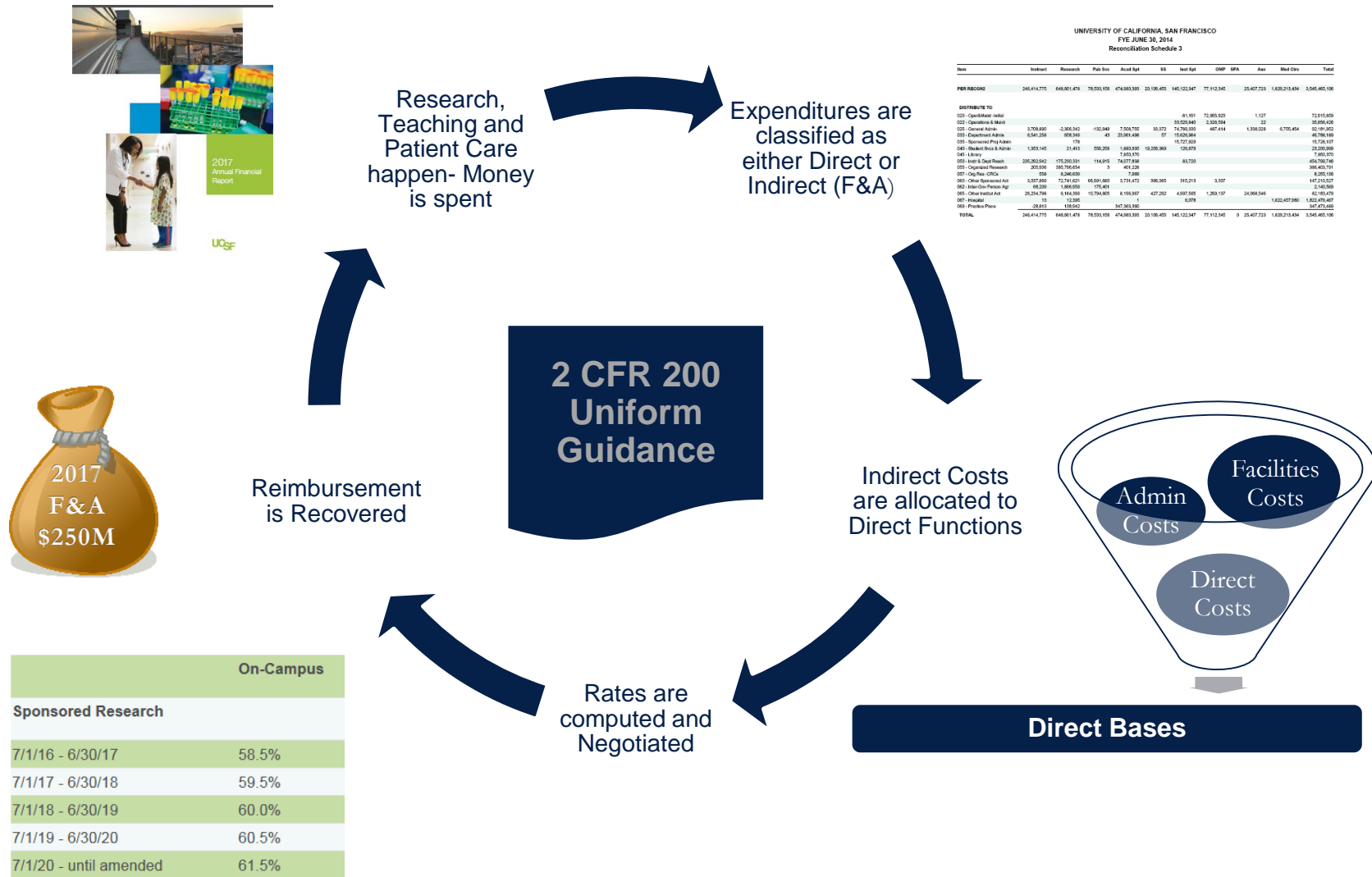
F&A Funding: The Bedrock of Biomedical Research

- <https://www.youtube.com/watch?v=QhDsWVbPMB0>
- Note: While draconian federal limits are not currently impending, the effects highlight the importance of optimizing return.

Negotiated F&A rates for Organized Research have increased, but are restrained by the administrative cap



The Big Picture - Facilities and Administration



F&A Survey Particulars

- Responsible Parties
- Particular research units
- Research room types
- Reflecting FY 2019-2020 functional activity
- Resources

F&A Responsible Persons

- Space supporting multiple functions requires informed review to appropriately functionalize
- Organized research often utilizes high cost lab space more intensively than does instruction, patient care or other activity
- To optimize recovery UCSF requires your support to functionalize campus multi-use research space.
- *“The responsible persons should*
 - *be familiar with the Cost Principles academic functional definitions,*
 - *have knowledge of the space and its occupants and*
 - *have knowledge of the funding sources for the room occupants.”*

-CAS Best Practices Manual and Review Guide January 2017

Departmental Resources / Responsible Persons

Information for the space survey comes from those who are familiar with the functional usage of the space:

- Department business managers
- Facility managers
- Department chairs and principal investigators may provide information and approval
- Departmental Representative may need to gather information from the above resources in order to complete the room survey.

2019 F&A Survey Population

- Research Labs, Research Offices
- Research Support Rooms



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10	129070	M_Microbiology and Immunology	21	333019	P_Pharmaceutical Chemistry
11	121085	M_Neurological Surgery			

Reflecting activity from July 1, 2019 through Jun 30, 2020

F&A Space Functionalization Period

- Reflects activity between July 1, 2019 and June 30, 2020
- Start with year to date activity
- Consider future plans, new occupants, expected projects
 - Record assumptions in F&A notes box in Archibus
- If room is in transition, record activity for room while in use
- If future is not known report current use

Resources

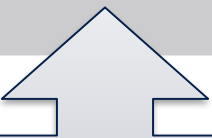
- This Training, Functional Definitions & FAQs will be updated on the Archibus home page
- To support review BRM will provide Divisions
 - In person meetings to review nuances and confirm consistency in coding
 - A list of active OR chartfields
 - A PI expenditure functional profile
 - A list of potentially OR chartfields not yet coded
- BRM will review and follow up next year based on fiscal year end result comparison to coding

Cost Principles

- F&A Costs
- Academic and Non Academic Functions
- Academic Functional Definitions

What are F&A Costs

Facilities Costs	Administrative Costs
<ul style="list-style-type: none">• Depreciation related to facility construction and renovation• Cost to operate facilities (custodial, utilities, security, repair and maintenance, etc.)• Capital Interest Expense• Library Costs• Equipment Depreciation• Campus Infrastructure	<ul style="list-style-type: none">• President's Office• Legal• Human Resources• Sponsored Programs Administration• Pre-award and Post-award Staff• Department Administrators• Financial Officers• Clerical and Support Staff• Data Management Professionals



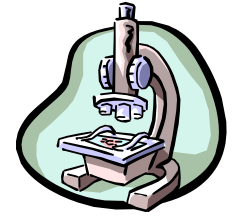
The Facilities component is the biggest driver of the F&A rate calculation and is highly dependent on the results of the space survey.

Academic and Non Academic Functions

Academic Functions	Non-Academic Functions
<ul style="list-style-type: none">• Organized Research (OR)• Clinical Research Center (CRC)• Service Center (SC)• Clinical Trials - Private (CT)• Other Sponsored Activities (OSA)• Instruction and Department Research (IDR)• Other Institutional Activities (OIA)• Departmental Administration (DA)	<ul style="list-style-type: none">• General Administration (GA)• Special Service Facility (SSF)• Sponsored Projects Admin (SPA)• Student Services (SS)• Library (LIB)• Operations & Maintenance (OM)• Renovations (REN)

**Note: You will not necessarily use all of these codes. Please review the following slides for commonly used codes academic functions.*

Organized Research (OR)



- Formal research and development activities

Separately budgeted and accounted for with a distinct chartstring

- Requires chartstring(s) supporting the OR activity in the room
- Examples are:
 - NIH R01 awards are typical OR
 - Office of the President funded AIDS research projects
 - Tobacco-Related Disease Research Program research projects
 - Research Evaluation & Allocation Committee (REAC) funded projects
 - Academic Senate Committee (ASC) funded research projects
 - Clinical Trials Federal projects

NOT coded Organized Research (OR)

- Instruction & Departmental Research (IDR):
 - Research Training (such as NIH K, T & F Awards)
 - Development and Scholarly activities
 - Training or fellowship grants (Non-Federal)
- Departmental Research: Funds that are not “separately budgeted and accounted for”
- CTSI Clinical Research Centers (CRC):
 - Clinical Research Center funded research



CTSI Clinical Research Centers (CRC)

- Separately budgeted and accounted for research activity funded by the Clinical Research Centers portion of the Clinical and Translational Science Institute
- These activities were previously referred to as General Clinical Research Centers (GCRC)
- Requires chartstring(s) supporting the CRC activity in the room

Instruction & Departmental Research (IDR)

- Teaching
- Training
- Course and curriculum development
- Academic advising and development
- Departmental research
 - Research development and scholarly activities that are supported by unrestricted funds, or funds that are **not separately budgeted and accounted for**, are coded IDR
- Department research development (Discretionary funded)
- Research training (such as NIH K, T & F awards)
- Student services
 - student records, student organizations, and student lounges



Other Sponsored Activities (OSA)

- Allowable activities funded through UCSF ledger by an **outside sponsor** not meeting the definition for Instruction, Organized Research, CRC, or Clinical Trials (federal or private sponsor)
- Intergovernmental Personnel Act Agreements supporting UCSF PI's working with the VA and similar contract activity
- Other examples include health service projects, community service programs, and State of California sponsored clinical trials



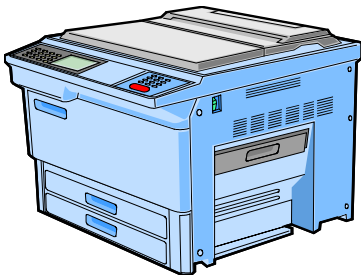
Clinical Trials - Private (CT)

- Private sponsored clinical trials or drug studies
 - State or local government sponsored clinical trials are Other Sponsored Activities (OSA) for space purposes, not CT
 - Federal clinical trials are organized research (OR) for space purposes
 - CT activities are normally related to FDA approval process
- Sponsor examples include commercial drug companies (Merck, Lilly, Genentech), the American Heart Association, the Centers of Disease Control (CDC) etc.
- Often located in a clinical setting; either inpatient, outpatient, or medical office



Service Center (SC)

- Space in academic units used by recharge activities
- Service centers are self-supporting centers with regularly reviewed and approved rates. These operations charge users directly based on actual use of services or sale of products
- Examples include special equipment use like MRI and copier services or professional services like CPR training
- Requires the Service Center operating chartstring(s) be listed
- New this year a Service Center should be identified as a room PI when service center activity exists



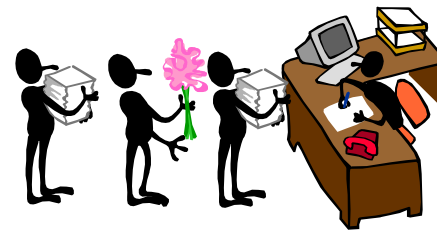
Other Institutional Activities (OIA)

- Non-sponsored activities not associated with any other defined Functional Use category
- Examples include: hospital activities, clinical activities (not including clinical trials/drug studies), auxiliary enterprise activities, HHMI, etc.
- Also includes fund raising/development activities
- Nonpaid activities



Departmental Administration (DA)

- Departmental/divisional administration, operations supporting multiple functions (e.g. Instruction, Research, Patient Care, etc.)
- Activities not directly related to a specific project or a direct activity
- Examples of DA include an appropriate portion of:
 - Departmental office space
 - Departmental service areas
- DA will be associated with all the functions of the Department
- EXCEPTION: Administrative activities NOT considered DA:
 - Support directly charged to a sponsored project fund



Renovation (REN)



- REN is 100% or 0% for rooms
- For rooms being renovated during the full fiscal year and ***occupied for less than 6 months***, code the space 100% REN and make note in FA Notes:
 - expected renovation mo/yr & expected occupancy mo/yr
 - expected occupancy department & anticipated functional use
- For rooms being renovated during the full fiscal year and ***occupied for 6 months or more***, do not use REN, instead code the space according to its use during the base year and make note in FA Notes:
 - renovation mo/yr & occupancy mo/yr

Special Considerations

Hightlight of F&A proposal space survey 'Hot Topics'

- Space to Base
- Funding & Occupants
- Students
- Support Space and Block Coding
- 100% Organized Research Space

Space to Base

- Dollars: F&A function codes are assigned to every chartstring with expenditures.
- Space: Space Functions correlate the activity conducted within each room to the supporting funds through the space survey.
- Dollars and space
 - The Space Function code(s) assigned to a room must reflect the function code(s) of the chartstring(s) supporting the activities in the room.
 - The ratio of space to dollars may not be a one-to-one relationship.
 - The Space Function percentages should reflect the activities performed in each individual room.

Funding and Occupants

- a) How would space used for research funded through **start-up funds** be treated?
- b) How would space used by **visiting faculty** paid from their home institution or country be treated?
- c) How would space used by **emeritus faculty** be functionalized?
- d) How would Organized Research (OR) or Other Sponsored Activity (OSA) activity funded through departmental funds included as **cost sharing** within the award be coded?

- a) Instruction and Department Research (IDR)
Other Institutional Activities (OIA). Please use the F&A note box in Archibus to document the name of the visiting faculty.
- b) Other Institutional Activities (OIA). Please use the F&A note box in Archibus to document the name of the emeritus faculty.
- c) Other Institutional Activities (OIA). Please use the F&A note box in Archibus to document the name of the emeritus faculty.
- d) Committed cost sharing activity should also be treated like the award as OR or OSA.

Students

- Organized Research (OR) space only if the student is funded from OR grants.
- If any students are being funded through departmental funds, related activity should be coded as Instruction and Department Research (IDR).
- If any students not being paid, that space should be coded as Instruction and Department Research (IDR).
- If students use the space to do homework or to work on their thesis (where not paid from OR grants) that space should be coded as Instruction and Department Research (IDR)
- Note of number or type of students using the F&A note box in Archibus when not included in occupants.

Support Space & Block Coding

- Research Support rooms (closets, cold rooms, storage, dark rooms etc.) may be specifically identified or may follow the functionalization of the supporting lab(s) and office(s).
- A copy function is available for use where appropriate and supportable.
- While similar codes are expected in localized lab areas or clusters, too much similar coding within a given department will lead to audit.
- Consideration needs to be given to each room.

100% Organized Research

Initial instinct is 100% Organized Research (OR), but...

- Are there other activities taking place in the lab that are not related to research?
- Are there students doing instructional activity in the lab?
- Are there individuals that work in the lab not funded from a sponsored research award?
- Are there individuals that work in the lab that are not paid from University funds (visiting professors, emeritus professors, etc.)
- Space should only be considered 100% OR if **everyone** is fully funded from OR grants for work performed in that room
- Where minimal other activity may be conducted use an appropriate increment to address potential other use. Increments as small as 1% may be assigned

Example #1

- Two research assistants share a lab, each spending equal amounts of time in the room.
- One research assistant is highly paid and working on a large Organized Research grant with large amounts of supplies. Costs incurred = \$300,000.
- The other research assistant is paid less and is working on a small Department Research project. Costs incurred = \$100,000.

	<u>Research Assistant #1 (OR)</u>	<u>Research Assistant #2 (IDR)</u>
Space	50%	50%
Dollars	75%	25%

Answer: 50% OR, 50% IDR

Example #2

- A research assistant is the sole occupant of a lab.
- The lab is used for work on NIH Research awards ABC and XYZ.
- The occupant is paid 25% from ABC and 25% from XYZ for work in this lab, and 50% from departmental operating funds for work in other space.

Answer: 100% OR

Example #3

- Four research assistants occupy a lab.
- The only activities taking place in the room are Organized Research (OR) and Department Research (IDR).
- Consider that three of the RAs are funded from an OR grant, one is funded by the department, and all use the lab equally. What would be an appropriate allocation?

Answer: 75% OR, 25% IDR

- Maybe your review of the lab showed that it was not used equally and that the one IDR-funded RA spent considerable less time in the lab. What would be appropriate now?

Answer: Use your judgment. A percentage between 75% and 95% for OR would be reasonable.

Operations (Using Archibus)

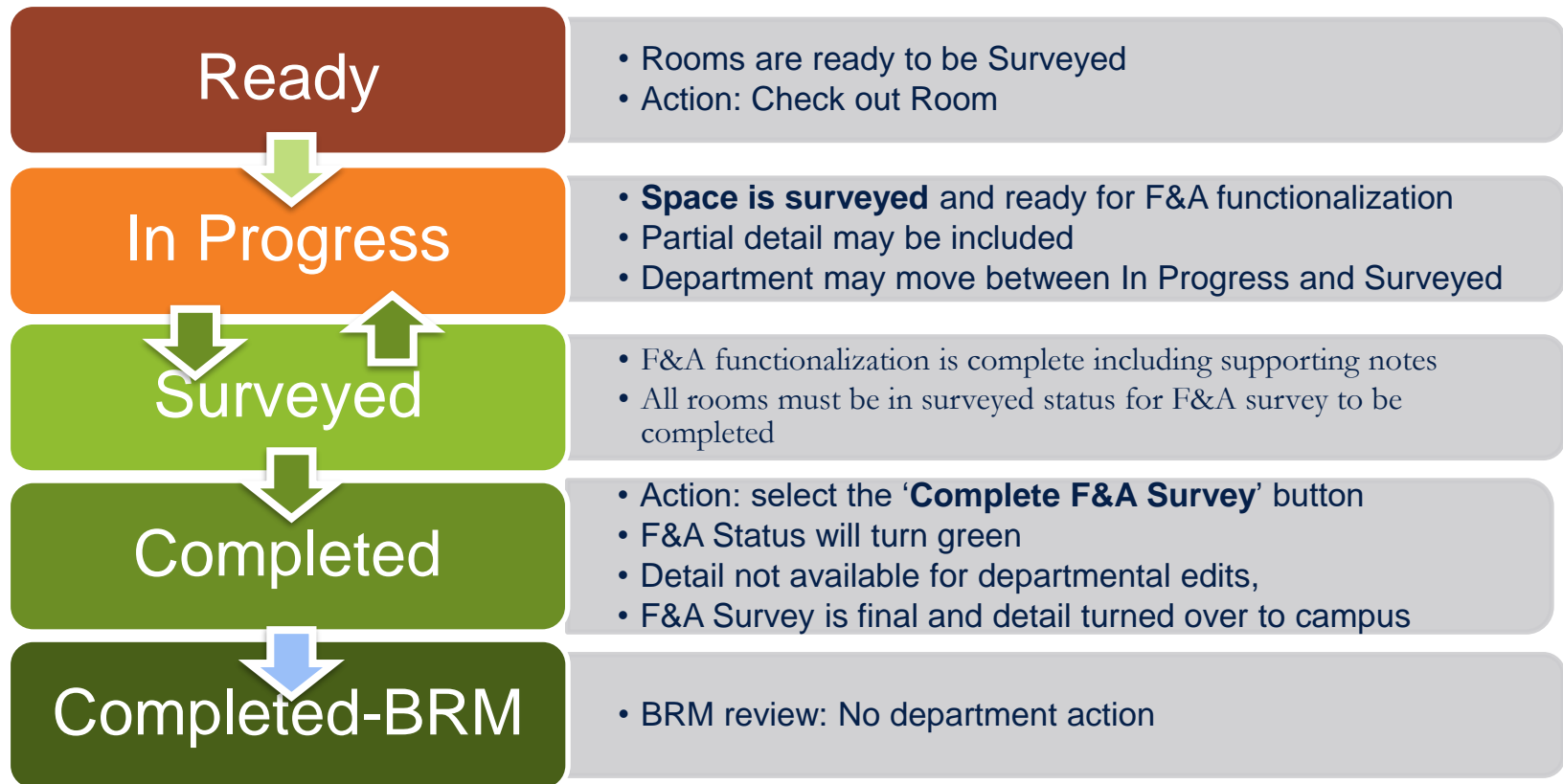
- Demo
- Check out Rooms
- Complete F&A Functionalization
 - Confirm Room Detail “Space Surveyed”
 - Functionalize Room
 - Log Supporting Information
 - Update Status
 - Keep records

DEMO 1 Fundamental F&A

[Tinyurl.com/ucsfstage](https://tinyurl.com/ucsfstage)

- Confirming Room Detail – Space Survey
- Functionalizing Space – Functionalization form
- Supporting Detail – F&A contact, chartfields
- Status updates
- Completion Activities – Keep records
- BRM Review

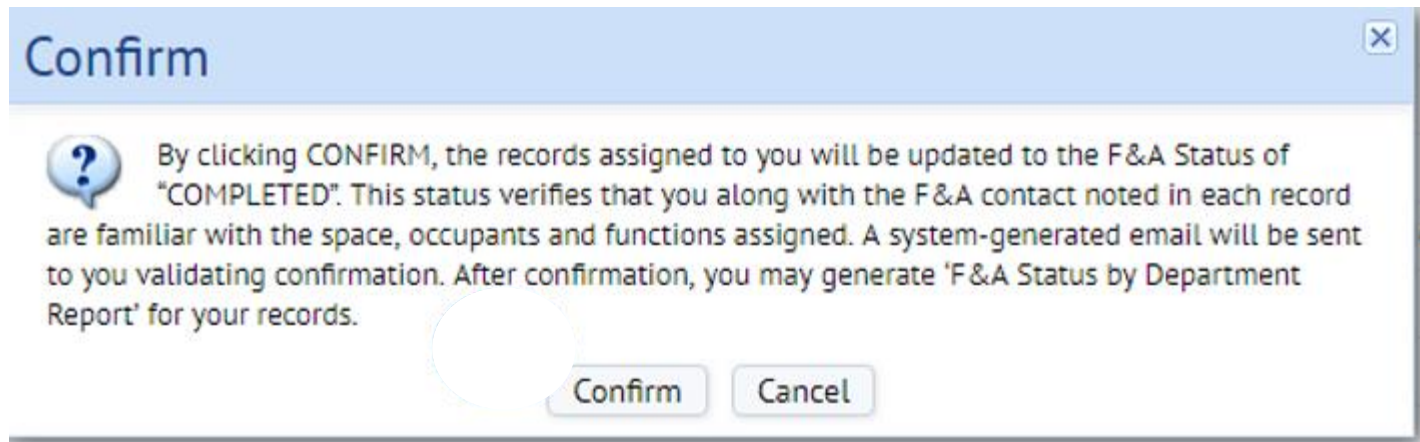
F&A Status flow during Survey



- F&A is not available until basic space detail has been surveyed
- Upon Completion users are certifying data and are advised to make and keep copies of records
- Copy Err and Chartstring Err will show if F&A copy caused an incomplete record

Completing the F&A Survey

- Upon completion, you will get a confirmation and prompt to record your submission.



- Generating the F&A Status by Department report will secure the data you have submitted for your records.
- An email will also be sent from the system documenting your completion.

Other Space Survey Items

Demo

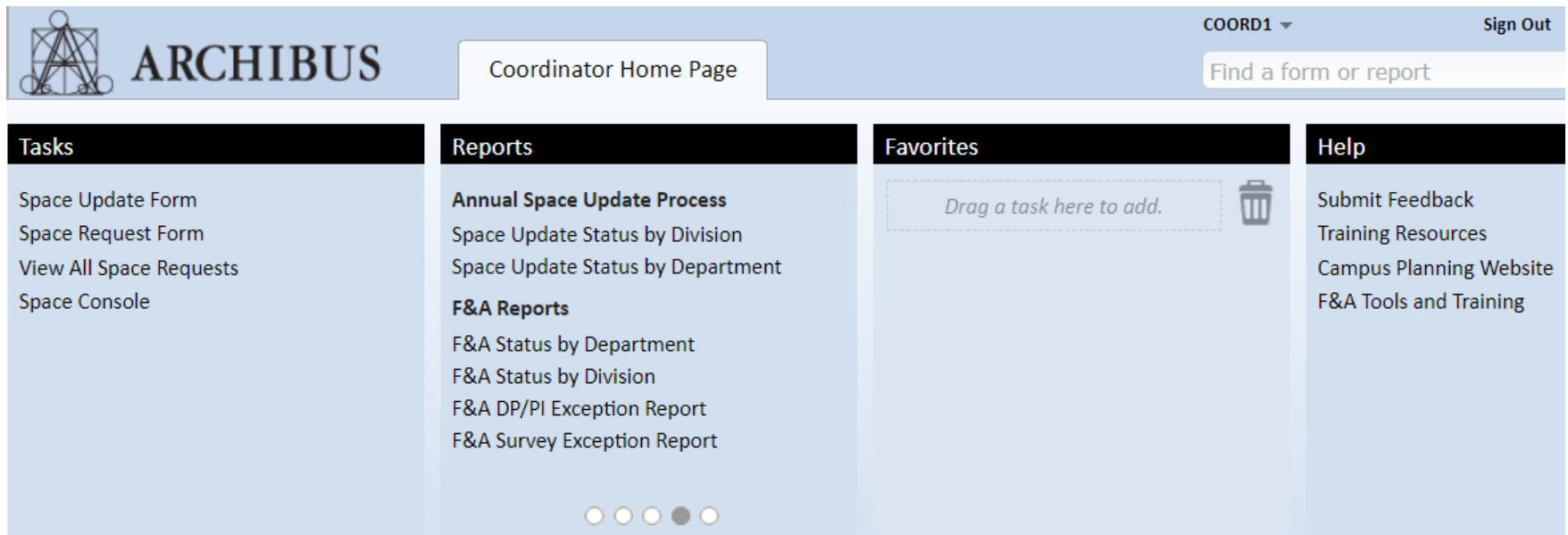
- Shared Space
- Copy Functions
- Reporting Tools

DEMO 2 – F&A's Finer Points

[Tinyurl.com/ucsfstage](https://tinyurl.com/ucsfstage)

- Shared rooms – status at lowest level
- Built in logic notes and Prior Survey
- Copying
- Reports
- F&A Tools and Training Resources – Archibus Home Page

F&A Reports



The screenshot displays the ARCHIBUS Coordinator Home Page. The top navigation bar includes the ARCHIBUS logo, a 'Coordinator Home Page' tab, a user dropdown menu set to 'COORD1', and a 'Sign Out' link. A search bar labeled 'Find a form or report' is also present. The main content area is divided into four columns: 'Tasks', 'Reports', 'Favorites', and 'Help'. The 'Reports' column is currently selected and expanded, showing a list of reports under the 'F&A Reports' section. The 'Favorites' column contains a dashed box with the text 'Drag a task here to add.' and a trash icon. The 'Help' column lists various resources like 'Submit Feedback' and 'Training Resources'.

Tasks	Reports	Favorites	Help
<ul style="list-style-type: none">Space Update FormSpace Request FormView All Space RequestsSpace Console	<ul style="list-style-type: none">Annual Space Update ProcessSpace Update Status by DivisionSpace Update Status by DepartmentF&A ReportsF&A Status by DepartmentF&A Status by DivisionF&A DP/PI Exception ReportF&A Survey Exception Report	<ul style="list-style-type: none">Drag a task here to add.	<ul style="list-style-type: none">Submit FeedbackTraining ResourcesCampus Planning WebsiteF&A Tools and Training

F&A Status by Department Report can be saved when complete to record submitted detail

Reports

F&A Reports		
F&A Status by Department	Division, Department,	Report shows the status of rooms where F&A Req = YES, which means detailed functionalization by the Space Coordinator is required.
F&A Status by Division	Division	Report shows the status of rooms where F&A Req = YES, which means detailed functionalization by the Space Coordinator is required.
F&A DP/PI Exception Report	Building, Floor, Division, Department	Report for all rooms where F&A Req = YES and one or both of the Department or PI info is missing as a guide for which rooms need to be flagged and corrected.
F&A Survey Exception Report	Building, PI Code, Division, Department	Report shows F&A records where no Functionalization has occurred yet but is required.

Report 1: F&A Status by Department

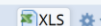
F&A Status by Department

F&A Status by Department



Division Code	Division Name	Department Code	Department Name	Total Survey Records	Total Ready	% Ready	Total In Progress	% In Progress	Total Copy - Error	% Copy - Error	Total Surveyed	% Surveyed	Total Complet
143100	M_HDF Comprehensive Cancer Ctr	143100	M_HDF Comprehensive Cancer Ctr	285	206	72.28%	0	0.00%	0	0.00%	79	27.72%	0

Department Detail




Building Code: 2^[282] 3^[3] All^[285]

Building Code	Building Name	Room Code	Room Category	Room Type	Room Area ft²	Room Notes	Business Unit Name	Division Code	Division Name	Department Code
2316	Helen Diller Family Cancer Research	236	C-WETLAB SUP	WET LAB SUP	101.11	Hot room	M_School of Medicine	143100	M_HDF Comprehensive Cancer Ctr	143100
2316	Helen Diller Family Cancer Research	255	C-WETLAB SUP	TISSUE CULT	100.98	Tissue Culture Rm	M_School of Medicine	143100	M_HDF Comprehensive Cancer Ctr	143100
2316	Helen Diller Family Cancer Research	255	C-WETLAB SUP	TISSUE CULT	100.98	Tissue Culture Rm	M_School of Medicine	143100	M_HDF Comprehensive Cancer Ctr	143100
2316	Helen Diller Family Cancer Research	346	C-WETLAB SUP	WET LAB SUP	101.67	Film Processor Recharge	M_School of Medicine	143100	M_HDF Comprehensive Cancer Ctr	143100
2316	Helen Diller Family Cancer Research	206	C-WETLAB SUP	WET LAB SUP	101.11	Dark Room	M_School of Medicine	143100	M_HDF Comprehensive Cancer Ctr	143100
2316	Helen Diller Family Cancer Research	222	C-WET LAB	WET LAB	5,168.10	including lab benches, equipment and additional...	M_School of Medicine	143100	M_HDF Comprehensive Cancer Ctr	143100
2316	Helen Diller Family Cancer Research	244	C-WETLAB SUP	WET LAB SUP	114.85	Film Processor Recharge	M_School of Medicine	143100	M_HDF Comprehensive Cancer Ctr	143100
2316	Helen Diller Family Cancer Research	245	C-WETLAB SUP	WET LAB SUP	200.63	Procedure Rm - Hemavet	M_School of Medicine	143100	M_HDF Comprehensive Cancer Ctr	143100
2316	Helen Diller Family Cancer Research	322	C-WETLAB SUP	WET LAB SUP	5,168.17	West Wing Open Lab Benches	M_School of Medicine	143100	M_HDF Comprehensive Cancer Ctr	143100
2316	Helen Diller Family Cancer Research	422	C-WET LAB	WET LAB	5,168.44		M_School of Medicine	143100	M_HDF Comprehensive Cancer Ctr	143100
2316	Helen Diller Family Cancer Research	425	C-WETLAB SUP	WET LAB SUP	60.80	Shared copier.	M_School of Medicine	143100	M_HDF Comprehensive Cancer Ctr	143100
2316	Helen Diller Family Cancer Research	440	C-WETLAB SUP	WET LAB SUP	391.53		M_School of Medicine	143100	M_HDF Comprehensive Cancer Ctr	143100
2316	Helen Diller Family Cancer Research	208	C-WETLAB SUP	WET LAB SUP	214.16		M_School of Medicine	143100	M_HDF Comprehensive Cancer Ctr	143100
2316	Helen Diller Family Cancer Research	208	C-WETLAB SUP	WET LAB SUP	214.16		M_School of Medicine	143100	M_HDF Comprehensive Cancer Ctr	143100
2316	Helen Diller Family Cancer Research	245	C-WETLAB SUP	WET LAB SUP	200.63	Procedure Rm - Hemavet	M_School of Medicine	143100	M_HDF Comprehensive Cancer Ctr	143100
2316	Helen Diller Family Cancer Research	250	C-WETLAB SUP	WET LAB SUP	302.40	Linear Equipment Room	M_School of Medicine	143100	M_HDF Comprehensive Cancer Ctr	143100

Report 2: F&A Status by Division

F&A Status by Division

F&A Status by Division															 XLS
Division Code	Division Name	Total Survey Records	Total Ready	% Ready	Total In Progress	% In Progress	Total Copy - Error	% Copy - Error	Total Surveyed	% Surveyed	Total Completed	% Completed	Total Completed - BRM	% Completed - BRM	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
143100	M HDF Comprehensive Cancer Ctr	285	206	72.28%	0	0.00%	0	0.00%	79	27.72%	0	0.00%	0	0.00%	

Division Detail

Building Code: 2^[282] 3^[3] All^[285]

Building Code	Building Name	Room Code	Room Category	Room Type	Room Area ft ²	Room Notes	Business Unit Name	Division Code	Division Name	Department Code
2316	Helen Diller Family Cancer Research	236	C-WETLAB SUP	WET LAB SUP	101.11	Hot room	M_School of Medicine	143100	M_HDF Comprehensive Cancer Ctr	143100
2316	Helen Diller Family Cancer Research	255	C-WETLAB SUP	TISSUE CULT	100.98	Tissue Culture Rm	M_School of Medicine	143100	M_HDF Comprehensive Cancer Ctr	143100
2316	Helen Diller Family Cancer Research	255	C-WETLAB SUP	TISSUE CULT	100.98	Tissue Culture Rm	M_School of Medicine	143100	M_HDF Comprehensive Cancer Ctr	143100
2316	Helen Diller Family Cancer Research	346	C-WETLAB SUP	WET LAB SUP	101.67	Film Processor Recharge	M_School of Medicine	143100	M_HDF Comprehensive Cancer Ctr	143100
2316	Helen Diller Family Cancer Research	206	C-WETLAB SUP	WET LAB SUP	101.11	Dark Room	M_School of Medicine	143100	M_HDF Comprehensive Cancer Ctr	143100
2316	Helen Diller Family Cancer Research	222	C-WET LAB	WET LAB	5,168.10	including lab benches, equipment and additional...	M_School of Medicine	143100	M_HDF Comprehensive Cancer Ctr	143100
2316	Helen Diller Family Cancer Research	244	C-WETLAB SUP	WET LAB SUP	114.85	Film Processor Recharge	M_School of Medicine	143100	M_HDF Comprehensive Cancer Ctr	143100
2316	Helen Diller Family Cancer Research	245	C-WETLAB SUP	WET LAB SUP	200.63	Procedure Rm - Hemavet	M_School of Medicine	143100	M_HDF Comprehensive Cancer Ctr	143100
2316	Helen Diller Family Cancer Research	422	C-WET LAB	WET LAB	5,168.44		M_School of Medicine	143100	M_HDF Comprehensive Cancer Ctr	143100
2316	Helen Diller Family Cancer Research	425	C-WETLAB SUP	WET LAB SUP	60.80	Shared copier.	M_School of Medicine	143100	M_HDF Comprehensive Cancer Ctr	143100
2316	Helen Diller Family Cancer Research	440	C-WETLAB SUP	WET LAB SUP	391.53		M_School of Medicine	143100	M_HDF Comprehensive Cancer Ctr	143100
2316	Helen Diller Family Cancer Research	322	C-WETLAB SUP	WET LAB SUP	5,168.17	West Wing Open Lab Benches	M_School of Medicine	143100	M_HDF Comprehensive Cancer Ctr	143100
2316	Helen Diller Family Cancer Research	461	C-WETLAB SUP	WET LAB SUP	495.66		M_School of Medicine	143100	M_HDF Comprehensive Cancer Ctr	143100
2316	Helen Diller Family Cancer Research	325	C-WETLAB SUP	WET LAB SUP	254.52	Glasswash Autoclave Recharge	M_School of Medicine	143100	M_HDF Comprehensive Cancer Ctr	143100

Report 3: F&A DP/PI Exception Report

F&A DP/PI Exception Report

F&A DP/PI Exception Report

Building Code: 2^[524] 3^[118] All^[639]

Building Code	Building Name	Floor Code	Room Code	Room Type	BU Code	BU Name	Division Code	Division Name	Department Code	Department Name
2274	Moffitt Hospital	14	M1476	OFFICE	100000	M_School of Medicine	132050	M_Otolaryngology	132071	M_Oto-General OHNS
2274	Moffitt Hospital	08	M876	OFFICE	100000	M_School of Medicine	132050	M_Otolaryngology	132071	M_Oto-General OHNS
2252	Medical Science Building	12	1231	ADMN OFF SUP	100000	M_School of Medicine	106028	M_CMP (Cellular Molecular Pha	106028	M_CMP (Cellular Mole
2252	Medical Science Building	12	1250	ADMIN OFFICE	100000	M_School of Medicine	106028	M_CMP (Cellular Molecular Pha	106028	M_CMP (Cellular Mole
2252	Medical Science Building	10	1050	ADMN OFF SUP	100000	M_School of Medicine	122000	M_Dean's Office	122000	M_Dean's Office
2252	Medical Science Building	02	216	ADMN OFF SUP	100000	M_School of Medicine	122000	M_Dean's Office	122000	M_Dean's Office
2252	Medical Science Building	02	216A	ADMN OFF SUP	100000	M_School of Medicine	122000	M_Dean's Office	122000	M_Dean's Office
3001	Rock Hall	01	190	ADMN OFF SUP	100000	M_School of Medicine	122000	M_Dean's Office	122000	M_Dean's Office
3001	Rock Hall	01	190G	ADMN OFF SUP	100000	M_School of Medicine	122000	M_Dean's Office	122000	M_Dean's Office
3001	Rock Hall	01	190H	ADMN OFF SUP	100000	M_School of Medicine	122000	M_Dean's Office	122000	M_Dean's Office
3001	Rock Hall	01	190K	ADMN OFF SUP	100000	M_School of Medicine	122000	M_Dean's Office	122000	M_Dean's Office
2252	Medical Science Building	04	447B	ADMIN OFFICE	100000	M_School of Medicine	129070	M_Microbiology and Immunology	129070	M_Microbiology and I
2252	Medical Science Building	04	447D	ADMIN OFFICE	100000	M_School of Medicine	129070	M_Microbiology and Immunology	129070	M_Microbiology and I
2252	Medical Science Building	04	447G	ADMIN OFFICE	100000	M_School of Medicine	129070	M_Microbiology and Immunology	129070	M_Microbiology and I
2252	Medical Science Building	06	672	ADMIN OFFICE	100000	M_School of Medicine	140020	M_Neurology	140020	M_Neurology
2252	Medical Science Building	06	672B	ADMIN OFFICE	100000	M_School of Medicine	140020	M_Neurology	140020	M_Neurology
2252	Medical Science Building	06	672E	ADMIN OFFICE	100000	M_School of Medicine	140020	M_Neurology	140020	M_Neurology
2252	Medical Science Building	06	672G	ACAD OFFICE	100000	M_School of Medicine	140020	M_Neurology	140020	M_Neurology
2252	Medical Science Building	06	672H	ADMIN OFFICE	100000	M_School of Medicine	140020	M_Neurology	140020	M_Neurology
2252	Medical Science Building	06	672J	ACAD OFFICE	100000	M_School of Medicine	140020	M_Neurology	140020	M_Neurology
2252	Medical Science Building	06	672K	ACAD OFFICE	100000	M_School of Medicine	140020	M_Neurology	140020	M_Neurology
2252	Medical Science Building	07	750	ADMN OFF SUP	100000	M_School of Medicine	140020	M_Neurology	140020	M_Neurology
3042	Sandler Center	02	217	ADMIN OFFICE	100000	M_School of Medicine	140020	M_Neurology	140020	M_Neurology
3042	Sandler Center	02	217A	ADMIN OFFICE	100000	M_School of Medicine	140020	M_Neurology	140020	M_Neurology
3042	Sandler Center	02	217B	ADMIN OFFICE	100000	M_School of Medicine	140020	M_Neurology	140020	M_Neurology

Report 4: F&A Survey Exception Report

F&A Survey Exception Report
Show
Clear

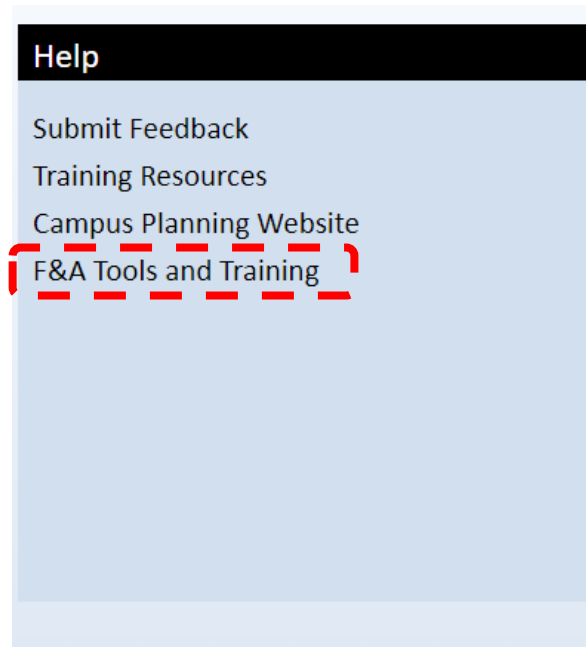
Building Code
PI Code
Division Code
Department Code

F&A Survey Exception Report
XLS

F&A Status	Primary Strategist	Primary Coordinator	Sum Of Percentages	CRC Charstrings	CRC Percentage	OR Charstrings	OR Percentage	SC Charstrings	SC Percentage	F&A Notes	F&A Contact
Ready	Suzanne Murphy	Kirstie Applen Kirk Hudson Ruth Pacquing	0.00			0		0		0	
Ready	Suzanne Murphy	Kirstie Applen Kirk Hudson Ruth Pacquing	0.00			0		0		0	
Ready	Suzanne Murphy	Kirstie Applen Kirk Hudson Ruth Pacquing	0.00			0		0		0	
Ready	Suzanne Murphy	Kirstie Applen Kirk Hudson Ruth Pacquing	0.00			0		0		0	
Ready	Suzanne Murphy	Kirstie Applen Kirk Hudson Ruth Pacquing	0.00			0		0		0	
Ready	Judy Fuller	Shauna Strong	0.00			0		0		0	
Ready	Suzanne Murphy	Kirstie Applen Kirk Hudson Ruth Pacquing	0.00			0		0		0	
Ready	Suzanne Murphy	Kirstie Applen Kirk Hudson Ruth Pacquing	0.00			0		0		0	
Ready	Suzanne Murphy	Kirstie Applen Kirk Hudson Ruth Pacquing	0.00			0		0		0	
Ready	Suzanne Murphy	Kirstie Applen Kirk Hudson Ruth Pacquing	0.00			0		0		0	
Ready	Suzanne Murphy	Kirstie Applen Kirk Hudson Ruth Pacquing	0.00			0		0		0	
Ready	Suzanne Murphy	Kirstie Applen Kirk Hudson Ruth Pacquing	0.00			0		0		0	
Ready	John Ewers Karin Wong	Adele Dow	0.00			0		0		0	
Ready	John Ewers Karin Wong	Adele Dow	0.00			0		0		0	
Ready	Suzanne Murphy	Timothy Orozco Ruth Pacquing	0.00			0		0		0	
Ready	John Ewers Karin Wong	Christine Razler	0.00			0		0		0	
Ready	John Ewers Karin Wong	Maria Noveleroi Christine Razler	0.00			0		0		0	
Ready	John Ewers Karin Wong	Maggie Millett	0.00			0		0		0	
Ready	John Ewers Karin Wong	Adele Dow	0.00			0		0		0	

F&A Resources - Archibus Homepage

- F&A Focus Group training presentation
- Functional definitions
- Chartstring lookup link
- FAQs



F&A Space Component Recap

- Focus Group Training Objectives
- F&A Survey Key Points
- Follow up/ Next Steps

Objectives

Goal

- Develop a basic understanding of
 - *the value of the F&A Space Survey and
 - *what is required to complete F&A functionalization within Archibus

Approach

- This training will provide:
 - * a Big Picture view of F&A
 - * descriptions of the concepts, terms and operations included in the F&A portions of the space survey

Key Points

- Professional judgment is the key; an “exact science” will become too complex
- First-hand knowledge is required
- Visiting professors and emeritus faculty activities cannot be 100% Organized Research (OR)
- Seed money, general funds supported, discretionary funds supported activities are not OR
- Pay attention to graduate research assistant, students in the space, and how they are funded
- If sponsored activity is supported with departmental funds documented as cost sharing the related portion of space should be coded like the activity as OR or OSA
- Note questions and review with BRM Support

Follow Up Plan – What's Next?

- Department Support documents will be provided
 - Organized research chartfields
 - PI fund profile
 - Non coded chartfields
- Schedule target follow up meeting
 - BRM team is available when you are
 - Schedule working and update meetings in October and November
 - Department Schedule worksheet in Box
 - -or email BRM / Garret Jang with requested day and time slot

Department Scheduling Tool

2019 F&A Space Meeting Schedule - October

Date	Day of Week/Timeslot	Division (1)	Primary Contact (1)	Additional Representatives (1)	Location (1)	Notes (1)	De
sample		M_MEDICINE	Alyssa Tecklenburg	Amy Akbarian, Brooks Bigart	HSW	See Amy for rm	
1	Tues 10-12		Enter Coordinator Name				
1	Tues 1-3pm						
1	Tues 3-5						
2	Weds 10-12						
2	Weds 1-3pm						
2	Weds 3-5pm						
3	Thurs 10-12						
3	Thurs 1-3pm						
3	Thurs 3-5pm						
4	Fri 10-12						
4	Fri 1-3pm						
7	Mon 10-12						
7	Mon 1-3pm						
7	Mon 3-5pm						
8	Tues 10-12						
8	Tues 1-3pm						
8	Tues 3-5pm						
16	Weds 1-3pm						
16	Weds 3-5pm						
17	Thurs 10-12						
17	Thurs 1-3pm						
17	Thurs 3-5pm						
18	all day	BRM	Morissa Gleichenhaus	Garret Janq and Darryl Lim	@ 654 minn	BRM no mtg	

October

November

List of Departments

Strategist and Coordinators

Sheet1

+

dy

Support Team

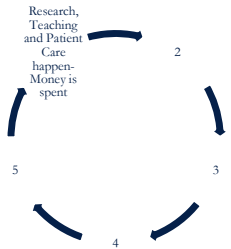
- BRM F&A Team (F&A component)
 - Darryl Lim (darryl.lim@ucsf.edu)
 - Morissa Gleichenhaus (mgleichenhaus@ucsf.edu)
 - Garret Jang (garret.jang@ucsf.edu)
 - Carol Luong (carol.luong@ucsf.edu)
 - Edel Alon (edel.alon@ucsf.edu)
- Space Analytics team (system operations)
 - Ritesha Khanna, Lisa Lettau, Craig Culver, Bob Pizzi
 - Archibus-support@ucsf.edu

Q&A

F&A Process Appendix

Money is spent in support of Mission

- Research, Teaching and Patient Care occur
- Financial Statements are produced
 - Space related expenditures include Depreciation and OMP



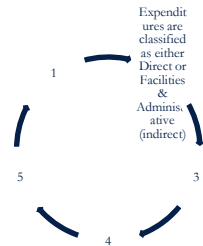
17. Operating Expenses by Function

Operating expenses, by functional classification, for the years ended

<i>(in thousands of dollars)</i>	2017	2016
Instruction	\$347,232	\$384,983
Research	1,059,394	1,109,712
Public service	132,405	125,986
Academic support	333,464	416,103
Student services	27,238	29,191
Institutional support	209,052	243,072
Operations and maintenance of plant	77,418	77,631
Student financial aid	20,987	20,208
Medical center	3,788,235	3,421,853
Auxiliary enterprises	32,736	36,513
Depreciation	342,716	335,259
Impairment of capital assets	653	845
Total operating expenses	\$6,371,530	\$6,201,356

Expenditures are classified as Direct or Indirect (F&A)

- Building Depreciation and Interest and
- Financial Statement Functions are restated into Federally defined Direct Bases and Indirect Pools



8. Land, Infrastructure, Buildings, Equipment, Libraries and Collections

UCSF's capital asset activity for the years ended June 30, 2014 and 2013 is as follows:

(in thousands of dollars)	2012	Additions	Disposals	2013	Additions	Disposals	2014
ORIGINAL COST							
Land	\$ 255,524	\$ 307	\$ -	\$ 255,831	\$ 36	\$ -	\$ 255,867
Infrastructure	3,554,977	147,863	(9,499)	3,693,341	88,754	(1,120)	3,780,975
Buildings and Improvements	671,830	73,088	(36,775)	708,143	46,971	(28,561)	726,553
Equipment	86,743	187	(4,610)	82,320	144	(62)	82,402
Libraries and collections	24,423	-	(8)	24,415	-	(71)	24,344
Special collections	654,602	325,296	(60,180)	919,718	376,619	-	1,296,337
Construction in progress							
Capital assets, at original cost	\$5,498,132	\$583,092	\$118,068	\$5,963,156	\$515,473	\$(56,229)	\$6,422,400

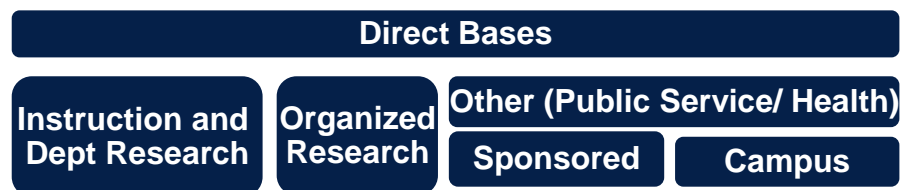
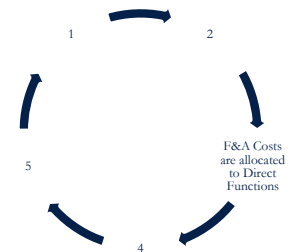
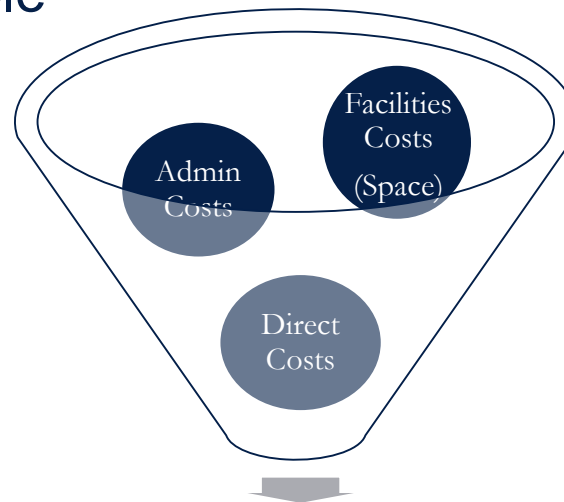
UNIVERSITY OF CALIFORNIA, SAN FRANCISCO FYE JUNE 30, 2014 Reconciliation Schedule 3

	Instruct	Research	Pub Svc	Acad Spt	SS	Inst Spt	OMP	SFA	Aux	Med Ctrs	Total
PER RECON2	246,414,775	648,601,478	78,503,156	474,980,393	20,109,455	145,122,347	77,112,345		25,407,723	1,829,213,434	3,545,465,106
DISTRIBUTE TO											
020 - Oper&Maint-Initial						-81,191	72,965,923		1,127		72,915,859
022 - Operations & Maint						33,529,840	2,326,594		22		35,856,426
025 - General Admin	3,708,890	-2,306,342	-132,949	7,508,755	33,372	74,789,330	487,414		1,338,028	6,755,454	92,181,952
030 - Department Admin	6,541,258	658,349	43	23,961,498	57	15,626,984					46,788,189
035 - Sponsored Proj Admin		178				15,727,929					15,728,107
040 - Student Svcs & Admin	1,353,145	21,413	559,258	1,880,935	19,259,369	126,879					23,200,999
045 - Library						7,850,370					7,850,370
050 - Instr & Dept Resch	205,262,942	175,230,331	114,915	74,077,858		83,720					454,799,746
055 - Organized Research	205,908	385,796,654	3	401,228							386,403,791
057 - Crg Res -CRCs	558	8,246,699		7,969							8,255,136
060 - Other Sponsored Act	3,037,869	72,741,621	66,991,680	3,731,472	389,365	315,213	3,307				147,210,527
062 - Inter-Gov Person Agr	68,209	1,896,959	175,401								2,140,569
065 - Other Institut Act	26,234,798	6,164,399	10,794,805	8,198,967	427,292	4,997,565	1,269,137		24,068,546		82,183,479
067 - Hospital	13	12,395		1		6,078				1,822,457,980	1,822,476,467
069 - Practice Plans	-28,813	138,942		347,363,390							347,473,489
TOTAL	246,414,775	648,601,478	78,503,156	474,980,393	20,109,455	145,122,347	77,112,345	0	25,407,723	1,829,213,434	3,545,465,106

Indirect Costs are allocated to Direct Functions

2 CFR 200 - Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards

- Allocations must be based on approved methods, supportable and reasonable
 - Cost Based
 - FTE
 - Via Survey



The Space Surveys inform Facilities allocations

- Space data allows allocation of costs by multiple methods:
 - Campus, Building, Department, Room Type, and Room

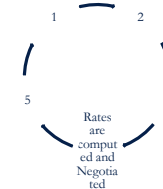
Space Statistics by Room

Bldg	Dept	Room #	Room Type	Room Desc	ASF	OR	IN
Smith	CVRI	100	250	Rsch Lab	550	90%	10%
Smith	CVRI	110a	255	Rsch Lab Service	95	90%	10%
Smith	CVRI	120	310	Office	150	25%	75%
Smith	CVRI	130	210	Class Lab	450	0%	100%

Summary Space Statistics

Allocate by	Summary Statistic	OR	IN
Campus	Total for all buildings and all departments	8%	92%
Building	Total for Smith (all departments in Bldg)	70%	30%
Department	Total CVRI (all rooms with CVRI)	65%	35%
Room Type	Total for Research Labs and Lab Services	90%	10%
Room	Individual Research Room #100	90%	10%

Rates are computed and Negotiated



UNIVERSITY OF CALIFORNIA, SAN FRANCISCO FYE JUNE 30, 2014 Rate Schedule By Direct Group, Indirect Group Report

Direct Cost Group: 055 - Organized Research

Indirect Cost Group	Base Indicator	Base	Allocated Amount	Rate	Capped Rate
Administrative					
025 - General Admin	All	391,279,811	31,415,340	8.03	
030 - Department Admin	All	391,279,811	82,755,765	21.15	
035 - Sponsored Proj Admin	Sponsor	372,481,289	11,735,766	3.15	
040 - Student Svcs & Admin	All	391,279,811	3,819,392	0.98	
Subtotal For Administrative			129,728,283	33.31	26.00
Facilities					
005 - Buildings	On Campus	329,708,059	43,274,583	13.13	
010 - Interest	On Campus	329,708,059	27,422,313	8.32	
015 - Equipment	On Campus	329,708,059	7,524,515	2.28	
022 - Operations & Maint	On Campus	329,708,059	54,225,773	16.45	
045 - Library	On Campus	329,708,059	6,114,080	1.85	
Subtotal For Facilities			138,561,264	42.03	42.03
On Campus Rate:				75.34	68.03
Add: Utility Allowance				1.30	1.30
On Campus Rate:				76.64	69.33
Off Campus Rate:				33.31	26.00

On-Campus

Sponsored Research

7/1/16 - 6/30/17	58.5%
7/1/17 - 6/30/18	59.5%
7/1/18 - 6/30/19	60.0%
7/1/19 - 6/30/20	60.5%
7/1/20 - until amended	61.5%

COLLEGES AND UNIVERSITIES RATE AGREEMENT

EIN: 94-6036493

DATE: 11/27/2017

ORGANIZATION:

FILING REF.: The preceding agreement was dated 05/23/2012

University of California (UCSF)
San Francisco Campus
654 Minnesota Street, 2nd Floor
San Francisco, CA 94143

The rates approved in this agreement are for use on grants, contracts and other agreements with the Federal Government, subject to the conditions in Section III.

SECTION I: Facilities And Administrative Cost Rates

RATE TYPES: FIXED FINAL PROV. (PROVISIONAL) PRED. (PREDETERMINED)

EFFECTIVE PERIOD

TYPE	FROM	TO	RATE(%) LOCATION	APPLICABLE TO
PRED.	07/01/2016	06/30/2017	58.50 On-Campus	Org. Research
PRED.	07/01/2017	06/30/2018	59.50 On-Campus	Org. Research
PRED.	07/01/2018	06/30/2019	60.00 On-Campus	Org. Research
PRED.	07/01/2019	06/30/2020	60.50 On-Campus	Org. Research
PRED.	07/01/2020	06/30/2021	61.50 On-Campus	Org. Research
PRED.	07/01/2016	06/30/2021	26.00 Off-Campus	Org. Research
PRED.	07/01/2016	06/30/2017	44.00 On-Campus	Instruction
PRED.	07/01/2017	06/30/2018	45.00 On-Campus	Instruction
PRED.	07/01/2018	06/30/2021	46.00 On-Campus	Instruction
PRED.	07/01/2016	06/30/2021	26.00 Off-Campus	Instruction
PRED.	07/01/2016	06/30/2017	34.00 On-Campus	(A)
PRED.	07/01/2017	06/30/2018	35.00 On-Campus	(A)
PRED.	07/01/2018	06/30/2021	37.00 On-Campus	(A)
PRED.	07/01/2016	06/30/2021	26.00 Off-Campus	(A)
PRED.	07/01/2016	06/30/2017	27.40 On-Campus	(B)
PRED.	07/01/2017	06/30/2018	28.40 On-Campus	(B)
PRED.	07/01/2018	06/30/2021	29.40 On-Campus	(B)
PRED.	07/01/2016	06/30/2017	19.70 Off-Campus	(B)

Page 1 of 5

Understanding F&A Calculation



- The F&A Rate is the mechanism used to reimburse the University for the infrastructure support costs as well as the administrative costs associated with sponsored research and other sponsored projects

Building Interest *Equipment Depreciation* *OMP including Utilities* *General Admin including Accounting & Finance*
Building Depreciation *Deferred Maintenance* *Library* *Sponsored Project Support* *Departmental Administration*

Allocable F&A Costs

$$\frac{\text{Allocable F\&A Costs}}{\text{Applicable Modified Total Direct Costs}} = \text{F\&A Rate}$$

Organized Research *Intergovernmental Personnel Act Agreements* *Other Institutional Activities (e.g. Medical Center)*
Other Sponsored Activities (e.g. Public Service) *Clinical Research Centers* *Departmental Research and Instruction*

- The F&A rate is essentially an overhead rate. It is calculated as a percentage of overhead associated with, an allocable to, sponsored research and other activities, divided by the direct costs of sponsored research and other activities

Reimbursement is Recovered

- UCSF recovers significant costs based on negotiated rates with sponsors to reimburse expenditures spent on related facilities and administration
- Recovered costs are used to support building debt payment, operations and maintenance of facilities, sponsored project support and more
- Continued assessment of F&A space detail is important to maintain or increase campus F&A rate(s) and related recovery



F&A Operations

UCSF Demo 1

Basic functionalizaiton

Accessing the Space Update Form

The screenshot displays the ARCHIBUS Coordinator Home Page. The page has a light blue header with the ARCHIBUS logo on the left and a search bar on the right. Below the header, there are four main sections: Tasks, Reports, Favorites, and Help. The Tasks section is highlighted with a red arrow pointing to the 'Space Update Form' link. The Reports section lists various reports under the heading 'Departments/Occupancy'. The Favorites section has a dashed box with the text 'Drag a task here to add.' and a trash icon. The Help section lists links for 'Submit Feedback', 'Training Resources', 'Campus Planning Website', and 'F&A Tools and Training'. Below these sections is a 'Notifications' section with a welcome message and information about the 'ANNUAL SPACE SURVEY TOWN HALL - 2019'.

ARCHIBUS Coordinator Home Page Find a form or

Tasks

- Space Update Form
- Space Request Form
- View All Space Requests
- Space Console

Reports

Departments/Occupancy

- Department By Building
- Building By Department
- Space Assignment and Occupancy by Department
- PIs By Department
- View All Rooms
- Occupancy

Favorites

Drag a task here to add.

Help

- Submit Feedback
- Training Resources
- Campus Planning Website
- F&A Tools and Training

Notifications

Welcome to the Archibus Space Management System!

For updates and revisions to Space Survey, please attend the

ANNUAL SPACE SURVEY TOWN HALL - 2019

on Thursday, September 5th from 10:00 - 11:30 AM at HSW 303

Please clear your browser cache & cookies weekly to avoid any lag in System Updates.

For questions/comments please contact: Archibus-Support@ucsf.edu

Finding Space Update Details

ARCHIBUS Coordinator Home Page Tasks ▾ Find a form or report

Space Update Form

My Room List **Active Space Update Room List** Room Details All Rooms

Building Code Division Code Department Code
 PI Name F&A Req

Show Clear

Active Room Information Complete F&A Survey Space Surveyed Submit Withdraw Complete Annual Space Survey

Building Code: 213471 131 All 1350

Space Update Status	Space Surveyed?	FA Status	FA Req	Floor Plan	Building Code	Building Name	Floor Code	Room Code	BU Name	Division Name	Department Name	Principal Investigator	Room Category	Room Type	Room Area Sq Ft.
<input type="checkbox"/> Ready	No	Ready	No		2018	Mt Zion Bldg A	07	A7-15A	M_School of Medicine	M_HDF Comprehensive Cancer Ctr	M_HDF Comprehensive Cancer Ctr	PI Assignment Pending	C-DRY LAB	DRY LAB SUP	1
<input type="checkbox"/> Ready	No	Ready	No		2018	Mt Zion Bldg A	07	A709	M_School of Medicine	M_HDF Comprehensive Cancer Ctr	M_HDF Comprehensive Cancer Ctr	David Donner	C-ADMIN	ADMIN OFFICE	7
<input type="checkbox"/> Ready	No	Ready	No		2018	Mt Zion Bldg A	07	A710	M_School of Medicine	M_HDF Comprehensive Cancer Ctr	M_HDF Comprehensive Cancer Ctr		C-ADMIN	ADMIN OFFICE	7
<input type="checkbox"/> Ready	No	Ready	No		2018	Mt Zion Bldg A	07	A712	M_School of Medicine	M_HDF Comprehensive Cancer Ctr	M_HDF Comprehensive Cancer Ctr		C-ADMIN	ADMIN OFF SUP	2
<input type="checkbox"/> Ready	No	Ready	No		2018	Mt Zion Bldg A	07	A715	M_School of Medicine	M_HDF Comprehensive Cancer Ctr	M_HDF Comprehensive Cancer Ctr		C-ADMIN	ADMIN OFFICE	32
<input type="checkbox"/> Ready	No	Ready	No		2018	Mt Zion Bldg A	07	A717	M_School of Medicine	M_HDF Comprehensive Cancer Ctr	M_HDF Comprehensive Cancer Ctr	Rahul Aggarwal	C-ACAD OFC	ACAD OFFICE	22
<input type="checkbox"/> Ready	No	Ready	No		2018	Mt Zion Bldg A	07	A720A	M_School of Medicine	M_HDF Comprehensive Cancer Ctr	M_HDF Comprehensive Cancer Ctr		C-ADMIN	ADMIN OFF SUP	2
<input type="checkbox"/> Ready	No	Ready	No		2018	Mt Zion Bldg A	07	A721A	M_School of Medicine	M_HDF Comprehensive Cancer Ctr	M_HDF Comprehensive Cancer Ctr		C-ADMIN	ADMIN OFF SUP	2
<input type="checkbox"/> Ready	No	Ready	No		2018	Mt Zion Bldg A	07	A723	M_School of Medicine	M_HDF Comprehensive Cancer Ctr	M_HDF Comprehensive Cancer Ctr	Robert Warren	C-ADMIN	ADMIN OFFICE	20
<input type="checkbox"/> Ready	No	Ready	No		2018	Mt Zion Bldg A	07	A723A	M_School of Medicine	M_HDF Comprehensive Cancer Ctr	M_HDF Comprehensive Cancer Ctr	Robert Warren	C-ADMIN	ADMIN OFF SUP	2
<input type="checkbox"/> Ready	No	Ready	No		2018	Mt Zion Bldg A	07	A724	M_School of Medicine	M_HDF Comprehensive Cancer Ctr	M_HDF Comprehensive Cancer Ctr	Eric Nakakura	C-ADMIN	ADMIN OFFICE	20
<input type="checkbox"/> Ready	No	Ready	No		2018	Mt Zion Bldg A	07	A724A	M_School of Medicine	M_HDF Comprehensive Cancer Ctr	M_HDF Comprehensive Cancer Ctr	Eric Nakakura	C-ADMIN	ADMIN OFF SUP	2
<input type="checkbox"/> Ready	No	Ready	No		2018	Mt Zion Bldg A	07	A725	M_School of Medicine	M_HDF Comprehensive Cancer Ctr	M_HDF Comprehensive Cancer Ctr	Insoo Suh	C-ADMIN	ADMIN OFFICE	20
<input type="checkbox"/> Ready	No	Ready	No		2018	Mt Zion Bldg A	07	A725A	M_School of Medicine	M_HDF Comprehensive Cancer Ctr	M_HDF Comprehensive Cancer Ctr	Insoo Suh	C-ADMIN	ADMIN OFF SUP	2

How to Update Space

ARCHIBUS Coordinator Home Page Tasks

Space Update Form

My Room List Active Space Update Room List Room Details All Rooms

Building Code Division Code Department Code

PI Name

Room Information

Building Code: 2[20] 3[119] All[1319]

<input type="checkbox"/> Space Update Status	Floor Plan	Building Code	Building Name	Floor Code	Room Code	BU Name	Division Name	Department Name	Principal Investigator	Room Category	Room Type	Room Area Sq. Ft.	Number of Stations	Availability	Edit Note
<input type="checkbox"/> In Progress		2280	UC Hall	03	300	F_Finance & Administration	F_Real Estate	F_RE Projects	Cary Kraft	C-WET LAB	WET LAB	2,773.32	4	1	
<input type="checkbox"/> In Progress		2280											2	2	
<input type="checkbox"/> In Progress		2280											2	2	
<input type="checkbox"/> In Progress		2280											2	2	
<input type="checkbox"/> In Progress		2280											0	0	
<input type="checkbox"/> In Progress		2280											5	5	
<input type="checkbox"/> In Progress		2280											0	0	
<input type="checkbox"/> In Progress		2280											14	14	
<input type="checkbox"/> In Progress		2280											6	6	
<input type="checkbox"/> In Progress		2280											6	6	
<input type="checkbox"/> Ready		2280											7	3	
<input type="checkbox"/> Ready		2280											1	0	
<input type="checkbox"/> Ready		2280											1	1	
<input type="checkbox"/> Ready		2280											0	-1	
<input type="checkbox"/> Ready		2280											0	0	
<input type="checkbox"/> Ready		2280											0	0	
<input type="checkbox"/> Ready		2280											10	10	
<input type="checkbox"/> Ready		2280											0	0	
<input type="checkbox"/> Ready		2280											0	0	
<input type="checkbox"/> Ready		2280	UC Hall	B	803	F_Finance & Administration	F_Real Estate	F_RE Projects		C-ADMIN	ADMIN OFF SUP	1,186.71	0	0	
<input type="checkbox"/> Ready		2280	UC Hall	B	804	F_Finance & Administration	F_Real Estate	F_RE Projects		C-ADMIN	ADMIN OFF SUP	170.17	0	0	
<input type="checkbox"/> Ready		3043	654 New Name	02	201	SHARED	SHARED	SHARED		C-ADMIN	CONFERENCE RM	107.38	4	2	
<input type="checkbox"/> Ready		3043	654 New Name	02	204	SHARED	SHARED	SHARED		C-ADMIN	CONFERENCE RM	537.14	30	30	
<input type="checkbox"/> Ready		3043	654 New Name	02	205	SHARED	SHARED	SHARED		C-ADMIN	ADMIN OFF SUP	305.65	0	0	
<input type="checkbox"/> Ready		3043	654 New Name	02	207	F_Finance & Administration	F_Real Estate	F_RE Projects		C-ADMIN	ADMIN OFF SUP	206.06	1	1	
<input type="checkbox"/> Ready		3043	654 New Name	02	209	F_Finance & Administration	F_Real Estate	F_RE Planning		C-ADMIN	ADMIN OFF SUP	310.03	0	0	

F&A Overview Step 1 – Space Attributes

- Coordinator
- Verify the **physical attributes** of each room such as building name, room number, room type, PI, Occupants and approximate square footage for accuracy

Edit Rooms

Space Update Queue

Room Details

View Rooms

F&A Accept

Compare

Save

Cancel

Room Information

Edit

Status

Space Surveyed?

FA Status

FA Flag

Floor Plan

Modified By

Building Code

Building Name

Floor Code

Room Code

Division Name

Department Name

Room Category

In Progress

Yes

Ready

Yes

Adrian Miu

2316

Helen Diller Family Cancer Research

03

322

SHARED

SHARED

C-WETLAB SUP

Department/PI Splits

Add New

Delete

Edit

Status

Modified By

Division Name

Department Name

PI Name

Loaned From Division Name

Is Banked

Is Hotel

Percentage of Spa

In Progress

Adrian Miu

M_MEDICINE

M_MED-HMON-CORE

Eric Collisson

M_HDF Comprehensive Cancer Ctr

No

No

In Progress

Adrian Miu

M_HDF Comprehensive Cancer Ctr

M_HDF Comprehensive Cancer Ctr

PI Assignment Pending

M_HDF Comprehensive Cancer Ctr

No

No

Occupancy

Add New

Remove

No records to display.

F&A Overview Step 2 – Functional Activities

- Coordinator with F&A Contact
- Record F&A Contact if assistance was provided
- Identify the **activities** which took place in the room during base year

Functional Use Survey

M_Neurology William A. Weiss Helen Diller Family Cancer

EXPECTED - ACADEMIC

OR 0
CRC 0
SC 0
CT (Private) 0
OSA 0
IDR 0
OIA 0
DA 0

SPECIAL - NON-ACADEMIC

SSF 0
SS 0
LIB 0
GA 0
OM 0
SPA 0
REN 0

FA_SF1
FA_SF2
FA_SF3
FA_SF4

ChartString(s)

OR Chartstrings
CRC Chartstrings
SC Chartstrings

F&A Contact
F&A Notes

Prior Survey Functionalization

Survey Year	F&A Function Contact Name	OR %	OR Cha
2018		0.00	
2018	PI Bluestone	90.00	SFCMP

Total 0

F&A Overview Step 3 – Supporting Detail

- Coordinator with F&A Contact
- Identify the **projects/grants** that are funding the activities taking place in the room
- Record notes including additional **personnel** who were working in the space during the fiscal year other than occupants and PI

ChartString(s)

OR Chartstrings	<input type="text"/>	x	<input type="text"/>	x
CRC Chartstrings	<input type="text"/>	x	<input type="text"/>	x
SC Chartstrings	<input type="text"/>	x	<input type="text"/>	x

F&A Contact

F&A Notes

Supporting Details (cont.) Chartstrings

- Room functions with OR, CRC, or SC require chartstring(s)
- In the Select Chartstring pop-up window, the chartstring will be displayed with an F&A code. This will assist in confirming functional alignment.
- Quality Assurance— If chartstring function and space function do not align, the system will generate a warning. However, it will not prevent you from submitting. These items will be reviewed by BRM. Notes qualifying rationale are appreciated.
- For support with chartstrings outside the tool see:
<https://www.cpfm.ucsf.edu/space/sis/chartstrings.cfm>

Chartstring LookupSpace@UCSF

Enter Filter Criteria

ParentDeptID:

SpeedType:

Exclude Zero YTD/Prior: ☐

Filter

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Clear	Chartstring	F&A	Fund	Dept	Fn	Project	PI	Prior\$

F&A Overview Step 4 – Update Status

- Coordinator with F&A Contact
- Surveyed status identifies state of specific room, department, PI
- Completed status identifies all department rooms are surveyed

Functional Use Survey
Provide an instruction panel (verbiage TBD by UCSF) that alerts the user that they are responsible for the Space Data as well as the F&A data being accurate

M_HDF Comprehensive Cancer Ctr **PI Assignment Pending** **Helen Diller Family Cancer Research - 01 - 137** Copy to Other Rooms Previous Split Next Split Previous

EXPECTED - ACADEMIC		ChartString(s)	
OR 0	<input type="text"/>	OR Chartstrings	<input type="text"/> x <input type="text"/> x <input type="text"/> x
CRC 0	<input type="text"/>	CRC Chartstrings	<input type="text"/> x <input type="text"/> x <input type="text"/> x
SC 0	<input type="text"/>	SC Chartstrings	<input type="text"/> x <input type="text"/> x <input type="text"/> x
CT (Private) 0	<input type="text"/>		
OSA 0	<input type="text"/>		
IDR 0	<input type="text"/>		
OIA 0	<input type="text"/>		
DA 0	<input type="text"/>	F&A Contact	<input type="text"/>
SPECIAL - NON-ACADEMIC		F&A Notes	<input type="text"/>
SSF 0	<input type="text"/>		
SS 0	<input type="text"/>		
LIB 0	<input type="text"/>		

F&A Status: **In Progress** (dropdown menu showing In Progress, Surveyed)

F&A Overview Step 5 – BRM Review

- BRM F&A Team
- Conduct **review** of the coding, comparing space usage to payroll data, known as “space to base”
- Research Chartstring mismatches
- Verify 100% OR rooms
- Review Block coding
- Review high dollar organized research chartstrings without space

F&A Operations UCSF Demo 2 The Finer Points

Shared Rooms and F&A Status

82 F&A Survey Operations

Performing the F&A Survey

Copying Data from Room To Room

Space Update Form

My Room List | **Active Space Update Room List** | Room Details | All Rooms

Building Code Division Code Department Code
PI Name F&A Req

Active Room Information

Building Code: 2110 All 110

☐ Complete F&A Survey ☐ Space Surveyed ☐ Submit ☐ Withdraw

Space Status	F&A Req	F&A Status	Floor Plan	Compare	Modified By	Building Code	Building Name	Floor Code	Room Code	BU Name	Division Name	Department Name	Room Category	Room Type
<input type="checkbox"/> In Progress	Yes	Surveyed				2252	Medical Science Building	00	016D	E_Executive Vice Chancellor	E_Student Academic Affairs	E_Stdt Information Systems	C-ADMIN	ADMIN OFFICE
<input type="checkbox"/> In Progress	Yes	Ready				2252	Medical Science Building	00	016C	E_Executive Vice Chancellor	E_Student Academic Affairs	E_Stdt Information Systems	C-ADMIN	ADMIN OFFICE
<input type="checkbox"/> In Progress	Yes	Ready				2252	Medical Science Building	00	016B	E_Executive Vice Chancellor	E_Student Academic Affairs	E_Stdt Information Systems	C-ADMIN	ADMIN OFFICE
<input type="checkbox"/> In Progress	Yes	Ready				2252	Medical Science Building	00	016A	E_Executive Vice Chancellor	E_Student Academic Affairs	E_Stdt Information Systems	C-ADMIN	ADMIN OFF SUP
<input type="checkbox"/> In Progress	Yes	Ready				2252	Medical Science Building	00	016	E_Executive Vice Chancellor	E_Student Academic Affairs	E_Stdt Information Systems	C-ADMIN	ADMIN OFF SUP
<input type="checkbox"/> In Progress	Yes													
<input type="checkbox"/> In Progress	Yes													
<input type="checkbox"/> In Progress	Yes													
<input type="checkbox"/> In Progress	Yes													
<input type="checkbox"/> In Progress	Yes													
<input type="checkbox"/> In Progress	Yes													

Space Update Form

My Room List | Active Space Update Room List | **Room Details** | All Rooms

Room Information

Edit Status Space Surveyed? F&A Status F&A Flag Floor Plan Modified By Building Code Building Name Floor Code Room Code Division Name Department Name Room Category Room Type

☐ In Progress Yes Surveyed Yes 2252 Medical Science Building 00 016D E_Student Academic Affairs E_Stdt Information Systems C-ADMIN ADMIN OF

Department/PI Splits

Delete Edit Room Split Update Status Modified By Division Name Department Name PI Name Loaned From Division Name

☐ In Progress E_Student Academic Affairs E_Stdt Information Systems

Occupancy

☐ Name - Full Email Address Primary Empl

☐ Robert Turbyfill Robert.Turbyfill@ucsf.edu Yes

Room Functionalization

Edit Copy F&A Status PI Name Division Name Department Name Use and Percentage CRC Chartstrings OR Chartstrings SC Chartstrings

☐ Surveyed E_Student Academic Affairs E_Stdt Information Systems IDR - 35.00%OSA - 65.00%

Performing the F&A Survey

Copying Data from Room To Room (cont.)

Space Update Form

My Room List | Active Space Update Room List | **Room Details** | All Rooms

Copy Functionalization

Room(s) to Copy FROM Show Matching Records

<input type="checkbox"/> F&A Status	Function % and Chartstring	Floor Plan	Building Code	Building Name	Floor Code	Room Code	Percentage of Space	Department Name	Room Type	Room Area ft²	Assigned Department Code	Assigned Department Name	PI
<input checked="" type="checkbox"/> Surveyed	%		2281	Mission Hall Building	06	6560	100.00	M_HDF Comprehensive Cancer Ctr	DRY LAB	40.01	143100	M_HDF Comprehensive Cancer Ctr	PI

Room(s) to Copy TO Copy to Selected Room(s) Show All

☐ Chartstring | ☐ F&A Function % | ☐ F&A Contact | ☐ F&A Notes | ☐ F&A Status

<input type="checkbox"/> F&A Status	Space Surveyed?	Function % and Chartstring	Floor Plan	Building Code	Building Name	Floor Code	Room Code	Percentage of Space	Department Name	Room Type	Room Area ft²	Room Department Code	Room Department Name
<input type="checkbox"/> Ready	Yes	%		2037	Cancer Research Bldg	01	S172	100.00	M_HDF Comprehensive Cancer Ctr	WET LAB SUP	112.95	143100	M_HDF Co
<input type="checkbox"/> Ready	Yes	%		2037	Cancer Research Bldg	01	S161	100.00	M_HDF Comprehensive Cancer Ctr	WET LAB SUP	94.56	143100	M_HDF Co
<input type="checkbox"/> Ready	Yes	%		2037	Cancer Research Bldg	04	S476						
<input type="checkbox"/> Ready	Yes	%		2037	Cancer Research Bldg	04	S473						
<input type="checkbox"/> Ready	Yes	%		2037	Cancer Research Bldg	04	S461						
<input type="checkbox"/> Ready	Yes	%		2037	Cancer Research Bldg		S349						
<input type="checkbox"/> Ready	Yes	%		2037	Cancer Research Bldg	03	S344						
<input type="checkbox"/> Ready	Yes	%		2037	Cancer Research Bldg	02	S262						

View F&A Contact, Percentages, Chartstring, F&A Notes

F&A Contact: Massi Coe

CRC Percentage 0	OR Percentage 0	SC Percentage 0
CRC Chartstring 1	OR Chartstring 1	SC Chartstring 1
CRC Chartstring 2	OR Chartstring 2	SC Chartstring 2
CRC Chartstring 3	OR Chartstring 3	SC Chartstring 3
CRC Chartstring 4	OR Chartstring 4	SC Chartstring 4
CRC Chartstring 5	OR Chartstring 5	SC Chartstring 5
CT Percentage 0	DA Percentage 0	GA Percentage 0
IDR Percentage 35	LIB Percentage 0	OIA Percentage 0
OM Percentage 0	OSA Percentage 65	REN Percentage 0
SPA Percentage 0	SS Percentage 0	SSF Percentage 0

F&A Notes: Completing Survey

Message

Update successful
Surveyed: 9

OK

Performing the F&A Survey

Additional Tools

Functional Use Survey

Provide an instruction panel (verbiage TBD by UCSF) that alerts the user that they are responsible for the Space Data as well as the F&A data being accurate

E_Laboratory Animal Rsch

PI Assignment Pending

Rock Hall - 01 - 133

Copy to Other Rooms

Previous Split

Next Split

Previous Room

Next Room

Save

Close

EXPECTED - ACADEMIC

OR 75

CRC 25

SC 0

CT (Private) 0

OSA 0

IDR 0

OIA 0

DA 0

SPECIAL - NON-ACADEMIC

SSF 0

SS 0

LIB 0

GA 0

OM 0

SPA 0

REN 0

Total 100

ChartString(s)

OR Chartstrings SFCMP-4000-136224-44-123521A

CRC Chartstrings SFCMP-4002-135123-44-127552L

SC Chartstrings

F&A Contact Ritesh Khanna

F&A Status Surveied

F&A Notes This is where the user can place notes to make sure they are justifying the data provided against the room if necessary.

Prior Survey Functionalization

Survey Year	OR %	OR Chartstring	CRC %	CRC Chartstring	CT Percentage	OSA Percentage	IDR Percentage	OIA Percentage	DA Percentage	SC %	SC Chartstring	SSF %	SS %
2018	0.00		45.00	SFCMP-4002-135118-44-H19683G	0.00	0.00	0.00	0.00	0.00	55.00	0.00	0.00	
2018	0.00	FI CHO-5070-851050-47-1000000	0.00		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	

F&A Operations Appendix JLL basis

Performing the F&A Survey

Marking Space as Surveyed

A very big part of the F&A Survey process is ensuring that the Space Data is accurate and up to date. For this reason UCSF has implemented a tool that allows surveyors to signify they have reviewed the Space data before moving on to the F&A data.

1. Navigate to the Space Update Form
2. If the room hasn't yet been checked out it must be checked out from the My Room List tab.
3. Navigate to the Active Space Update Room List and use the filters to locate the room.
4. Click on the checkbox to the left of the room.
5. Click SPACE SURVEYED.
6. The Space Status will now be highlighted green to signify the space has been surveyed and the F&A process may begin.

Space Update Form

My Room List **Active Space Update Room List** Room Details All Rooms

Building Code Division Code Department Code
 PI Name F&A Req

Active Room Information Complete F&A Survey Space Surveyed Submit Withdraw Complete Annual Survey

Building Code: 2[266] 3[47] All[313] Page 1 of 4 Next >>

<input type="checkbox"/>	Space Status	F&A Req	F&A Status	Floor Plan	Compare	Modified By	Building Code	Building Name	Floor Code	Room Code	BU Name	Division Name	Department Name
<input checked="" type="checkbox"/>	In Progress	Yes	In Progress			First Admin	3042	Sandler Center	05	593H	SHARED	SHARED	SHARED
<input type="checkbox"/>	In Progress	N/A	N/A				2932	ZSFG Building 5	05	5H06	M_School of Medicine	M_MEDICINE	M_MED-HOSP-SFG
<input type="checkbox"/>	In Progress	No	Ready				2274	Moffitt Hospital	14	M1495B	M_School of Medicine	M_MEDICINE	M_MED-HOSP-SFG
<input type="checkbox"/>	In Progress	No	Completed - BRM				2274	Moffitt Hospital	14	M1495A	M_School of Medicine	M_MEDICINE	M_MED-HOSP-SFG
<input type="checkbox"/>	In Progress	No	Ready				2274	Moffitt Hospital	14	M1495	M_School of Medicine	M_MEDICINE	M_MED-HOSP-SFG
<input type="checkbox"/>	In Progress	N/A	N/A			First Coordinator	3045	Smith Cardiovascular Res	01	161	SHARED	SHARED	SHARED
<input type="checkbox"/>	In Progress	N/A	N/A				2932	ZSFG Building 5	03	3A34	M_School of Medicine	M_Urology	M_Uro-Adult-SFG
<input type="checkbox"/>	In Progress	N/A	N/A				2932	ZSFG Building 5	03	3A26	M_School of Medicine	M_Urology	M_Uro-Adult-SFG
<input type="checkbox"/>	In Progress	N/A	N/A				2932	ZSFG Building 5	03	3A20	M_School of Medicine	M_Urology	M_Uro-Adult-SFG
<input type="checkbox"/>	In Progress	N/A	N/A				2932	ZSFG Building 5	03	3A18	M_School of Medicine	M_Urology	M_Uro-Adult-SFG
<input type="checkbox"/>	In Progress	N/A	N/A				2932	ZSFG Building 5	03	3A16	M_School of Medicine	M_Urology	M_Uro-Adult-SFG
<input type="checkbox"/>	In Progress	N/A	N/A				2932	ZSFG Building 5	03	3A10	M_School of Medicine	M_Urology	M_Uro-Adult-SFG

Performing the F&A Survey

Performing Functionalization

Space Surveyors needs to pay close attention to the F&A Req field as this value directs that at what needs to be done as a part of the F&A Survey for each room. As a rule F&A Req = Yes means that data is needed from them for that room. To Functionalize the Room the user must:

1. Verify the Space Status is highlighted in green.
2. Verify the F&A Req = Yes
3. Click on the Space Status which will launch the Room Details tab.
4. Note the Room Functionalization Panel which is now present.
5. Note that if the user is actively working on the Space Survey, they can also click Space Surveyed on this tab as well to expose the Room Functionalization Panel (it will be hidden while Space Surveyed = NO).

Space Update Form

My Room List | Active Space Update Room List | **Room Details** | All Rooms

5

Space Surveyed | Compare | Save | Withdraw | Submit | Cancel

Room Information

Edit	Status	Space Surveyed?	F&A Status	F&A Flag	Floor Plan	Modified By	Building Code	Building Name	Floor Code	Room Code	Division Name	Department Name	Room Category	Room Type	Room Area Sq. Ft.	Number of Workstations	Availability	Date Modified	Date Started	Date Stopped
	In Progress	Yes	In Progress	Yes		First Coordinator	3001	Rock Hall	01	133	E_Vice Chanc Research	E_Laboratory Animal Rsch	C-WET LAB	WET LAB	215.19	0	0	7/25/2018	6/25/2018	First

Department/PI Splits

Delete	Edit	Room Split Update Status	Modified By	Division Name	Department Name	PI Name	Loaned From Division Name	Is Banked	Is Hotel	Percentage of Space	Loan Info
		In Progress	First Coordinator	E_Vice Chanc Research	E_Laboratory Animal Rsch	PI Assignment Pending		No	No	100.00	

Occupancy

Add New | Remove

No records to display.

Room Functionalization 4

Edit	Copy	F&A Status	PI Name	Division Name	Department Name	Use and Percentage	CRC Chartstrings	OR Chartstrings	SC Chartstrings	F&A Notes	Surveyed By	Last Updated By	F&A C
			<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

In Progress | PI Assignment Pending | E_Vice Chanc Research | E_Laboratory Animal Rsch | OSA - 100.00%

First Coordinator

Performing the F&A Survey

Performing Functionalization (cont.)

Once the user is ready to start capturing the F&A data they will do so on a detailed functionalization screen created specifically to help capture the data by:

6. Click on the Edit Pencil within the Room Functionalization panel (users will only be able to edit records they own).
7. Function Codes are provided to which percentages can be associated
8. Chartstring Lookup Fields are provided (5 each) for Function Codes that may require them to back up the work being done in the room.
9. F&A Contact and F&A Notes can be captured.
10. The F&A Status can be updated so that the room is IN PROGRESS while working and marked SURVEYED when all data is captured.

Space Update Form

My Room List | Active Space Update Room List | **Room Details** | All Rooms

Space Surveyed | Compare | Save | Withdraw | Submit | Cancel

Room Information

Edit	Status	Space	F&A	F&A	Floor	Modified By	Building	Building	Floor	Room	Division Name	Department Name	Room	Room	Room	Number of	Availability	Date	Date	Starte
	In Progress	Yes	In Progress	Yes			Code	Name	Code	Code			Category	Type	Area Sq.	Workstations		Modified	Started	First
						First Coordinator	3001	Rock Hall	01	133	E_Vice Chanc Research	E_Laboratory Animal Rsch	C-WET LAB	WET LAB	215.19	0	0	7/25/2018	6/25/2018	First

Department/PI Splits

Delete	Edit	Room Split Update Status	Modified By	Division Name	Department Name	PI Name	Loaned From Division Name	Is Banked	Is Hotel	Percentage of Space	Loan Info

Occupancy

No records to display.

Functional Use Survey

Provide an instruction panel (verbiage TBD by UCSF) that alerts the user that they are responsible for the Space Data as well as the F&A data being accurate

Room Functionalization

E_Laboratory Animal Rsch | PI Assignment Pending | Rock Hall - 01 - 133 | Copy to Other Rooms | Previous Split | Next Split | Previous Room | Next Room | Save | Close

EXPECTED - ACADEMIC

OR	CRC	SC	CT (Private)	OSA	IDR	OIA	DA
0	0	0	0	100	0	0	0

SPECIAL - NON-ACADEMIC

SSF	SS	LIB	GA	OM	SPA	REN
0	0	0	0	0	0	0

ChartString(s)

OR Chartstrings	CRC Chartstrings	SC Chartstrings
8		

F&A Contact

9

F&A Notes

F&A Status In Progress 10

Prior Survey Functionalization

Survey	OR	%	OR Chartstring	CRC	%	CRC Chartstring	CT	%	OSA	%	IDR	%	OIA	%	DA	%	SC	%	SC	%	SSF	%	SS	%
2018	0.00			45.00		SFCMP-4002-135118-44-H19683G	0.00		0.00		0.00		0.00		55.00		0.00		0.00		0.00		0.00	
2018	0.00		FI CHD-5070-851050-42-1000000	0.00			0.00		0.00		0.00		0.00		0.00		0.00		0.00		0.00		0.00	

Performing the F&A Survey

Function Code Percentages

Now that we have discussed the data to be captured, let's talk about how to complete each value starting with the Function Code Percentages.

1. The Surveyor is responsible for entering the percentage of work done against each Function Code for the room split (shared) or room. Those percentages are entered in the box to the right of the proper Function Code.
2. At the bottom note the Total for Function Code percentage. The record can only be marked SURVEYED when that total = 100% and is green, otherwise it will be red and will only allow the user to save IN PROGRESS status for the record.
3. Saving IN PROGRESS will retain any of the updates that have been made up to this point for further work.

Functional Use Survey
Provide an instruction panel (verbiage TBD by UCSF) that a

E_Laboratory Animal Rsch

EXPECTED - ACADEMIC

OR	0	?
CRC	0	?
SC	0	?
CT (Private)	0	?
OSA	100	①
IDR	0	?
OIA	0	?
DA	0	?

SPECIAL - NON-ACADEMIC

SSF	0	?
SS	0	?
LIB	0	?
GA	0	?
OM	0	?
SPA	0	?
REN	0	?

Total 100 ②

Performing the F&A Survey

Function Code Percentages (cont.)

If the user applies 100% of the space against the OR (Organized Research) this value is likely to draw scrutiny downstream so the system will ask for verification that this is correct upon SAVE.

1. The Surveyor enters 100% against OR.
2. The Surveyor provides at least one Chartstring.
3. The user clicks SAVE.
4. The message is displayed from which the user can choose CONFIRM to save the record or CANCEL to move back and make additional adjustments.

Space Update Form

My Room List | Active Space Update Room List | **Room Details** | All Rooms

Functional Use Survey

Provide an instruction panel (verbiage TBD by UCSF) that alerts the user that they are responsible for the Space Data as well as the F&A data being accurate

E_Laboratory Animal Rsch | **Medical Science Building - 03 - 386A** | Copy to Other Rooms

EXPECTED - ACADEMIC

OR 100 (1) | OR Chartstrings SFCMP-4300-140024-44-119838A (2) | x | x | x

CRC 0 | CRC Chartstrings | x | x | x

SC 0 | SC Chartstrings | x | x | x

CT (Private) 0

OSA 0

IDR 0

OIA 0

DA 0

F&A Contact

F&A Notes

F&A Status: Surveyed

SPECIAL - NON-ACADEMIC

SSF 0

SS 0

LIB 0

GA 0

OM 0

SPA 0

REN 0

Prior Survey Functionalization

Survey Year	OR %	OR Chartstring	CRC %	CRC Chartstring	CT %	OSA %	IDR %	OIA %	DA %	SC %	SC Chartstring
2012	0.00		0.00		0.00	0.00	0.00	0.00	0.00	0.00	

Confirm

? Percentage for OR is 100. This makes this room highly likely for audit. Please confirm or modify as appropriate. (4)

Confirm | Cancel

Performing the F&A Survey

Entering Chartstrings

If OR, CRC and SC are used in Functionalizing the room supporting Chartstrings are required (at least 1 and up to 5).

1. If the user enters a percentage greater than 0% at least one supporting Chartstring is required. If the user tries to save the record with Status of SURVEYED and there are none the user will receive an error message.

My Room List Active Space Update Room List **Room Details** All Rooms

Functional Use Survey
Provide an instruction panel (verbiage TBD by UCSF) that alerts the user that they are responsible for the Space Data as well as the F&A data being accurate

E_Laboratory Animal Rsch PI Assignment Pending Rock Hall - 01 - 133 Copy to Other Rooms Previous Split Next Split Previous

EXPECTED - ACADEMIC		ChartString(s)	
OR	75	OR Chartstrings	
CRC	25	CRC Chartstrings	
SC	0	SC Chartstrings	
CT (Private)	0		
OSA	0		
IDR	0		
OIA	0		
DA	0		
SPECIAL - NON-ACADEMIC			
SSF	0		
SS	0		
LIB	0		

F&A Contact F&A Notes

F&A Status Surveyed

Message
Functions CRC, OR, SC with percentages greater than 0 must have a chartstring. Please add supporting chartstring to complete room survey.
OK 1

Performing the F&A Survey

Entering Chartstrings (cont.)

Once the user has percentages against the proper Function Codes, if Chartstrings are required the populate them by:

1. Click on the ... button to launch the Chartstring lookup pop-up.
2. Note that the Space F&A CD column matches the Function Code against which the user is trying to enter the Chartstring and the initial list shows those Chartstrings associated with the current PI.
3. When you find the Chartstring needed simply click on it to populate it to the field.
4. If the Chartstring to be used falls under another Space F&A CD the user can click SHOW ALL to see all Chartstrings.

**Note – If a Chartstring with a mismatch Space F&A CD is used the user will be prompted to verify this is correct.*

Functional Use Survey
Provide an instruction panel (verbiage TBD by UCSF) that alerts the user that they are responsible for the Space Data as well as the F&A data being accurate

E_Laboratory Animal Rsch **PI Assignment Pending** **Rock Hall - 01 - 133** Copy to Other Rooms Previous Split Next

EXPECTED - ACADEMIC **ChartString(s)**

OR 75 OR Chartstrings
CRC 25 CRC Chartstrings
SC 0 SC Chartstrings

CT (Private)

Select Chartstring Show All

Chartstring	Tree String	Business Unit	Department Code	Space F&A CD
SFCMP-4000-136224-44-123521A	999999-100000-136200-136224-	SFCMP	136224 M_PEDS-GENERAL PEDIATRICS	OR
SFCMP-4301-136224-44-120000	999999-100000-136200-136224-	SFCMP	136224 M_PEDS-GENERAL PEDIATRICS	OR
SFCMP-4000-148223-44-125452A	999999-100000-148200-148222-148223-	SFCMP	148223 M_Surg-Pediatrics-Core	OR
SFCMP-4000-148223-45-125452A	999999-100000-148200-148222-148223-	SFCMP	148223 M_Surg-Pediatrics-Core	OR
SFCMP-4000-148233-44-125452A	999999-100000-148200-148232-148233-	SFCMP	148233 M_Surg-Vascular-Core	OR
SFCMP-4100-148223-44-121482A	999999-100000-148200-148222-148223-	SFCMP	148223 M_Surg-Pediatrics-Core	OR
SFCMP-4300-148223-44-129543A	999999-100000-148200-148222-148223-	SFCMP	148223 M_Surg-Pediatrics-Core	OR
SFCMP-4301-148223-44-128187A	999999-100000-148200-148222-148223-	SFCMP	148223 M_Surg-Pediatrics-Core	OR
SFCMP-4300-138376-44-126327A	999999-100000-138300-138337-138365-138370-138376-	SFCMP	138376 M_MED-CORE-HMON-ONCO-THOR	OR
SFCMP-4300-138423-44-126327A	999999-100000-138300-138337-138365-138370-138423-	SFCMP	138423 M_MED-CORE-HMON-ONCO-GEN	OR
SFCMP-4301-120083-44-128425A	999999-100000-120077-120081-120083-	SFCMP	120083 M_EM-General-ZSFG	OR
SFCMP-4301-138377-44-122655A	999999-100000-138300-138439-138377-	SFCMP	138377 M_MED-ZSFG-HMON	OR

Performing the F&A Survey

Entering Chartstrings (cont.)

If the user, after entering a Chartstring, needs to remove it for any reason they can do so by:

1. Click on the x to the right of the populated chartstring field.
2. This will clear the selected Chartstring from that field.
3. Click Save.

**Note – If the user needs to select a different Chartstring than the one currently selected, they can simply use the ... to select the proper Chartstring and it will overwrite the existing value once selected.*

The image displays two screenshots of the F&A Survey form. The top screenshot shows the 'ChartString(s)' section with three rows: 'OR Chartstrings', 'CRC Chartstrings', and 'SC Chartstrings'. Each row has a text input field followed by a small 'x' button. A circled '1' points to the 'x' button next to the 'OR Chartstrings' field. Below this section are fields for 'F&A Contact', 'F&A Notes', and 'F&A Status' (set to 'Surveyed'). The bottom screenshot shows the same form but with a 'Wendell Lim Byers Hall - 04 - 411' header and navigation buttons like 'Copy to Other Rooms', 'Previous Split', 'Next Split', 'Previous Room', and 'Next Room'. A circled '2' points to the 'x' button next to the 'OR Chartstrings' field. A circled '3' points to the 'Save' button in the top right corner of the form.

Performing the F&A Survey

F&A Notes, F&A Contact and Status

Once the Function Codes and Chartstrings (if applicable) have been captured, the user can enter any notes as well as an F&A Contact, who will be the person responsible for the data should there be any questions. The user can then update the status to SURVEYED. This is accomplished by:

1. Click within the F&A Contact field and enter the name of the person.
2. Click within the F&A Notes field and enter any required notes.
3. Update the F&A Status to SURVEYED.
4. Click SAVE.
5. Note that within the Prior Survey Functionalization panel the user can see data from previous Surveys.

Functional Use Survey
Provide an instruction panel (verbiage TBD by UCSF) that alerts the user that they are responsible for the Space Data as well as the F&A data being accurate

E_Laboratory Animal Rsch **PI Assignment Pending** **Rock Hall - 01 - 133** [Copy to Other Rooms](#) [Previous Split](#) [Next Split](#) [Previous Room](#) [Next Room](#) [Save](#) [Close](#)

EXPECTED - ACADEMIC

OR 75
CRC 25
SC 0
CT (Private) 0
OSA 0
IDR 0
OIA 0
DA 0

SPECIAL - NON-ACADEMIC

SSF 0
SS 0
LIB 0
GA 0
OM 0
SPA 0
REN 0

ChartString(s)

OR Chartstrings SFCMP-4000-136224-44-123521A
CRC Chartstrings SFCMP-4002-135123-44-127552L
SC Chartstrings

F&A Contact Ritesh Khanna
F&A Notes This is where the user can place notes to make sure they are justifying the data provided against the room if necessary

F&A Status Surveied

Prior Survey Functionalization

Survey Year	OR %	CRC %	CRC Chartstring	CT Percentage	OSA Percentage	IDR Percentage	OIA Percentage	DA Percentage	SC %	SC Chartstring	SSF %	SS %
2018	0.00	45.00	SFCMP-4002-135118-44-H19683G	0.00	0.00	0.00	0.00	55.00	0.00		0.00	
2018	0.00	0.00	FLCHO-5070-851050-47-1000000	0.00	0.00	0.00	0.00	0.00	0.00		0.00	

Completing the F&A Survey

Space Coordinator or Space Strategist

The F&A Survey requires all records to be moved to a Surveyed Status. Once that F&A Status is present for all owned records the Coordinator can complete their part of the F&A Survey by:

1. Navigate to the Active Space Update Room List tab.
2. Verify that all F&A Status Records are Surveyed with the exception of those records where F&A Req = N/A or No.
3. Click on COMPLETE F&A SURVEY button.
4. Click CONFIRM on the pop-up message.
5. The F&A Status will then update for all.

**Note – At this complete stage the user will also receive an auto-generated email from the system confirming completion and giving them a record of the data/time.*

Space Update Form

My Room List **Active Space Update Room List** Room Details All Rooms

Building Code: Division Code: Department Code:

PI Name: F&A Req:

Active Room Information

Complete F&A Survey Space Surveyed Submit Withdraw Complete Annual Space Survey

Space Status	FA Req	FA Status	Floor Plan	Compare	Modified By	Building Code	Building Name	Floor Code	Room Code	BU Name	Division Name	Department Name	Principal Investigator	Room Code
In Progress	Yes	Surveyed			Coord A	2252	Medical Science Building 14	1471B	SHARED	SHARED	SHARED	Aaron Logan, PI Assignment Pending, Neil Pravin Shah	C-WETLA	
In Progress	Yes	Surveyed			Coord A	2252	Medical Science Building 14	1471A	SHARED	SHARED	SHARED	Eric Small, Aaron Logan, PI Assignment Pending, he...	C-WETLA	
In Progress	Yes	Surveyed			Coord A	2252	Medical Science Building 14	1457A	H_School of Medicine	H_HEDICINE	H_HEDICINE	PI Assignment Pending	CACAD O	
In Progress	Yes	Surveyed			Coord A				SHARED	SHARED	SHARED	Aaron Logan, PI Assignment Pending	C-WETLA	
In Progress	Yes	Surveyed			Coord A				SHARED	SHARED	SHARED	Aaron Logan, PI Assignment Pending	C-WETLA	
In Progress	Yes	Surveyed			Coord A				SHARED	SHARED	SHARED	Alain Algal	C-WET LA	
In Progress	Yes	Surveyed			Coord A				SHARED	SHARED	SHARED	Hank Hoasser, PI Assignment Pending	C-WETLA	
In Progress	Yes	Surveyed			First Coordinator				SHARED	SHARED	SHARED	John Park, Laura Van T' Veer	C-WETLA	

Confirm

By clicking CONFIRM, the records assigned to you will be updated to the F&A Status of COMPLETED. This status verifies that you along with the F&A contact noted in each record are familiar with the space, occupants and functions assigned. A system-generated email will be sent to you validating confirmation. After confirmation, you may generate F&A Status by Department Report for your records.

Confirm Cancel

Completing the F&A Survey

Space Coordinator or Space Strategist (cont.)

If the user clicks on the Complete F&A Survey button before all records are in a Surveyed status, the user will get a pop-up alerting them to the records which are not in the proper status. When this record is seen, no records will be moved to Completed status. This button is all or none in function.

Records Incompletely Surveyed

Cancel

The records assigned to you have not been updated to the status Completed.
The rooms below still need to be surveyed.

F&A Id: 1[1959] 9[569] A[[2528] Page 1 of 26 Next >>

Building Code	Building Name	Floor Code	Room Code
2037	Cancer Research Bldg	00	S071
2037	Cancer Research Bldg	03	N331
2037	Cancer Research Bldg	03	N331
2037	Cancer Research Bldg	03	N350
2037	Cancer Research Bldg	03	N350
2037	Cancer Research Bldg	03	N362
2037	Cancer Research Bldg	03	N362
2037	Cancer Research Bldg	03	N365
2037	Cancer Research Bldg	03	S361
2037	Cancer Research Bldg	03	S361
2037	Cancer Research Bldg	03	S363
2037	Cancer Research Bldg	03	S363
2037	Cancer Research Bldg	04	S463
2037	Cancer Research Bldg	04	S463

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