

**Updating Project F&A Returns**

Each year, the Office of the Vice President for Research returns F&A costs collected from grants and contracts during the preceding fiscal year (July 1 – June 30) to principal investigators, department chairs, and if appropriate, directors of certain authorized centers. The current distributions are at Project Manager (formerly Project PI) 10%; Department Chair 7.5%; and if a center is identified in UFIRST as supporting the project, then 7.5% to the Center Director. The remainder of the F&A costs collected is returned to the college. Only institutional Institutes and Centers are able to be selected. The official list and policies related to creation of such are available at: [http://www.ir.ufl.edu/centers/Active\\_Centers.pdf](http://www.ir.ufl.edu/centers/Active_Centers.pdf)

IFAS & Engineering returns are not handled automatically according to this formula but returned in whole to the college who distributes appropriately. All other units receive the funds directly to the overhead project matching the project manager and department on the earning sponsored project.

All F&A cost funds collected and returned under this policy must be used for expenditures that support research or sponsored training programs at the University of Florida.

To complete this activity, follow the steps below.

**Step 1**

Locate and open the UFIRST Award or Fund 214 Project. From the Workspace, click the Update Project IDC Returns.



**Step 2**

In the Update Project IDC Returns pop-up window two options will be available.

- 1) To add a new IDC Distribution
- 2) To update an existing IDC distribution

Update Project IDC Returns						
IDC Distributions:						
<a href="#">Add</a>						
Project	Project Name	Start Date	End Date	Center	Percentage	Delete?
<a href="#">Update</a>	P0009559	8/20/2016	7/31/2017	Institute for Therapeutic Innovation	7.50%	<input type="checkbox"/>

**Step 3**

Upon selecting either Add or Update, select the project for which the IDC Distribution is being made or adjusted.



**Step 4**

In field 2.0 use the text box to search for the Center that should receive IDC distributions from the previously identified project. Please note that the wildcard “%” can be used in this field to assist in the query.

2.0

**Current Center:**

\* **Change-to Center upon activity completion:**

%McKnight

Center Name	Center Acronym	Center ID
Evelyn F. & William L. McKnight Brain Institute of the University of Florida	MBI	10.0050

**Step 5**

In field 3.0 enter the percentage of the center IDC returns that should be allocated to this center. Please note only three centers can receive IDC distributions from a single project. Across all center distributions for a single project, the percentage of distribution cannot exceed 7.5%

3.0

**Current percentage of returned IDC for the selected center: %**

\* **Change-to Percentage of returned IDC for the selected center upon activity completion:**

7.5

Once complete click OK in both pop-up windows.

Repeat Steps 1-5 as necessary.

**To run a report and view your existing center allocations:**

UFIRST reports are available via Enterprise Reporting. To run these reports you must have the **UF\_FI\_UNIVERSAL\_INQUIRY** role.

To run a report, perform the following steps:

1. Log into [reporting.it.ufl.edu](https://reporting.it.ufl.edu) using your Gatorlink ID and password.
2. Navigate to Content > Team Content > Sponsored Program Information > Awards. Select the *F&A Return Percentage by Center or Project* report.

Team content / Sponsored Program Information / Awards

<input type="checkbox"/>	Name
<input type="checkbox"/>	Award Disbursements by College and Department All financial actions for specified timeframe, including cash-based Clinical Trial (Fund 214) awards. Report includes funds r
<input type="checkbox"/>	Award Funding Transactional Report (2007 - Present) All award transactions from 7/1/2007 to the present, including cash-based Clinical Trial (Fund 214) awards. Available Sear
<input type="checkbox"/>	Awards by Reporting Sponsor Category (by Fiscal Year & Month from 2007 - Present) All award transactions from 7/1/2007 to the present, including cash-based Clinical Trial (Fund 214) awards. Available Sear
<input type="checkbox"/>	Awards Received with Greater Than \$1 Million Anticipated Value All award-level transactions for specified timeframe, where the anticipated award amount UF will receive is greater than \$1
<input type="checkbox"/>	<b>F&amp;A Return Percentage by Center or Project</b> All projects and - if designated via UFIRST - the center and its planned return percentage. Projects with no data in UFIRST

3. Select the required and/or optional prompts for the data you want to view.
4. Click the **Finish** button. The report displays in Excel format.