# **How Click Grants Unit Data Points Impact Reporting and Oracle Access**

## **Key Points:**

- \*Submitting Department will be the "lead unit" for the proposal; it will be the unit used in summary proposal data reports and the unit used when setting up a new sponsored award in the Oracle business system
- \*Submitting Department unit should always be included in the credit distribution section
- \*Units receiving Financial Credit are loaded into Oracle; these units will receive "split" proposal and expenditure credit for the project

# **Click Grants Submitting Department**

There are two significant unit data point decisions in the Click Grants module that impact data reporting and post-award account access and credit. The first is the **Submitting Department** in the Funding Proposal smart form question on the Research Department Determination page. Generally, the Submitting Department will be the "home" department of the PI, though there may be some instances when it is more appropriate to select a unit other than the PI's home unit, for example, a Center or Institute that the PI is affiliated with. The Submitting Department is important because, when a proposal has been awarded, the Submitting Department will be the UB Organization entity under which the Award, Project, and Task will be set up in Oracle; this determines who, other than the PI, has view access to the account. Additionally, for reporting purposes, the Submitting Department will be viewed as the "lead unit" in non-spilt summary Proposal reporting and will be tallied as a proposal for that unit regardless of what the credit distribution is.



#### **Click Grants Credit Distribution**

The second important data point decision is in the **Credit Distribution** section. Here, the decision is made regarding how Proposal credit will be split among the PI and any co-Pis, and for each individual investigator, what UB unit(s) should receive their Financial and Recognition credit. These decisions impact **access** to any subsequent Oracle account and **credit assigned** to a person/unit for the project.

- **Proposal Credit:** Percentage credit that represents the distribution of each person's overall responsibility for the successful performance of the project.
- **Financial Credit:** For each individual, this represents the percentage credit attributed to each unit for split proposal, award, and research expenditure reporting. The financial credit is used to attribute research expenditure credit for internal and external reporting, and impacts department and school ranking in national/international surveys, and how UB allocates resources back to the unit.
- Recognition Credit: For each individual this represents the percentage credit to a unit to recognize and publicly
  acknowledge that unit's intellectual and/or resource contribution to the proposal and/or the project, if funded.
  Unlike financial credit, there is no direct financial impact for recognition credit. Recognition credit is important
  for recognizing university-wide centers and institutes, for example that do not benefit from financial credit
  attribution

NOTE: if a unit other than the PI's home department was selected as the Submitting Department, it must be manually added as an additional unit, otherwise the Submitting Department will not have any credit associated. The Submitting Department should ALWAYS receive some Financial and/or Recognition credit.

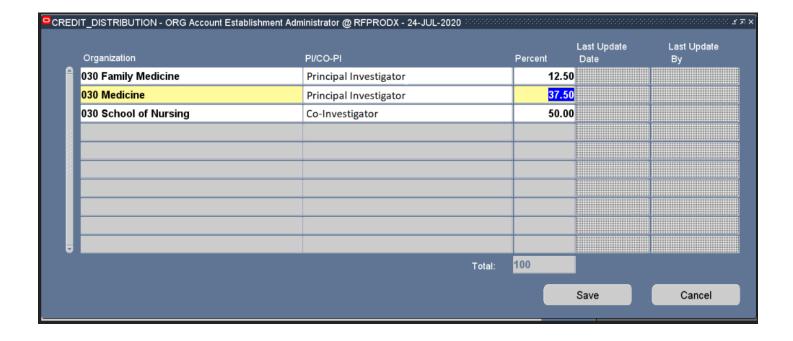
PI/Co-PI/Senior Person/Key Person	Department/Center/Institute	Proposal Credit	Financial Credit	Recognition Credit
PRINCIPAL INVESTIGATOR		50.00 %		
	030 Family Medicine		25.00 %	25.00 %
	030 Medicine		75.00 %	75.00 %
	Subtotal		100.00%	100.00%
CO-INVESTIGATOR		50.00 %		
	030 School of Nursing		100.00 %	100.00 %
	Subtotal		100.00%	100.00%
Proposal Credit Total		100.00%		

# **Impact on Oracle Sponsored Project Award Access**

When a proposal is funded and an account is set up in Oracle for the award, the Submitting Department will be setup as the Award, Project, and Task Organization. This will determine who has access to view the award in Oracle, as, other than the PI, only those staff granted access to the Submitting Department (e.g., an Assistant to Chair, or departmental grant manager) will be able to view it in the RF Business systems. If the incorrect Submitting Department is chosen, departmental support staff will not have access to view the account in the RF Business System.

# **Impact on Credit Assignment and Reporting**

When a proposal is awarded and an account is set up in Oracle, the credit distribution is loaded into the RF business system by multiplying the Proposal Credit x the Financial Credit and then multiplying by 100 for each person-unit dyad (see below screen shot). The sum of all these credit dyad products for each unit is the "split" credit for that unit for that project. For example, for the Principal Investigator, the credit for Medicine is the product of the Principal Investigator's Proposal Credit (50%) x Medicine's Financial Credit for the Principal Investigator (75%);  $50\% \times 75\% = 37.5\%$  (see data in the two screen shots on this page).



For Proposal reporting, each unit is credited with this "split" credit, shown as a percentage of the Proposal (out of 1.0). For Expenditure reporting, each unit is credited with the same percentage of the total project expenditures as their

"split" credit percentage for that project (see below screen shot based on the Click Credit Distribution screen shot from the previous page). For example, for every \$100 in expenditures for this project, Medicine will be credited with \$37.50, Family Medicine with \$12.50, and School of Nursing with \$50.00 in expenditures. The sum of all expenditure splits from all active awards for each unit will be the reported expenditure amount for that unit.

