

Credit Split Instructions

There are two different ways to allocate credit: Academic **Recognition** credit and **Financial** credit (net ICR distribution credits). This credit information will allow OSP to produce reports that reflect which individuals or units contribute to a project and to calculate the annual distribution of net Indirect Cost Return (ICR) funds for all units.

The **Financial** credit column is used to calculate the distribution of the campus net indirect cost reimbursement (net ICR funds) to departments, schools, colleges and other organizational units (Units). **Financial** credit will be based on the amount of support provided during the entire life cycle of the grant/contract award. It does not necessarily coincide with the percentage of effort of the investigators stated in the proposal budget. Distribution of **Financial** (ICR) credit can be split between Academic Department(s) and Centers as negotiated.

Academic **Recognition** may be used to credit individuals or Unit(s) that contribute to the project, but which may not be receiving **Financial** credit. While the UAlbany campus leaders have determined that this data will be used to recognize individuals and units that contribute to projects, they have also decided that the percentages entered in the **Recognition** column will not be used to calculate the *degree* of academic **Recognition**. So, any individual or unit included in this section will be reported as having contributed to the project, but without any reference to the size of the contribution.

It is necessary to complete the crediting split in both columns before the proposal can be validated and submitted. While the crediting splits for Academic **Recognition** and **Financial** Crediting may be completely different from each other, the instructions for entering the crediting data in each of the two columns are exactly the same.

Divide up 100% between Investigators

In each of the two columns, the credit must be split in two different ways. First, split the effort required for the project among the Investigators listed. The dark grey bars represent each Investigator's credit for the proposal. In each of the crediting columns, the sum of the entries in the dark grey bars must total 100%. This total is displayed in the **Investigator Total** line at the very bottom of the window. See Figure 1.

Split *Financial* credit (used for ICR distribution)

1. Select the field on the dark grey line to the right of the Principal Investigator, beneath the **Financial** heading.
2. Enter the proposed percent of **Financial** credit assigned to the PI. This percentage will be split between the Unit(s) listed under that Investigator when calculating ICR. (Total can range from 0 to 100%)

3. Repeat steps above for all Co-Investigators.

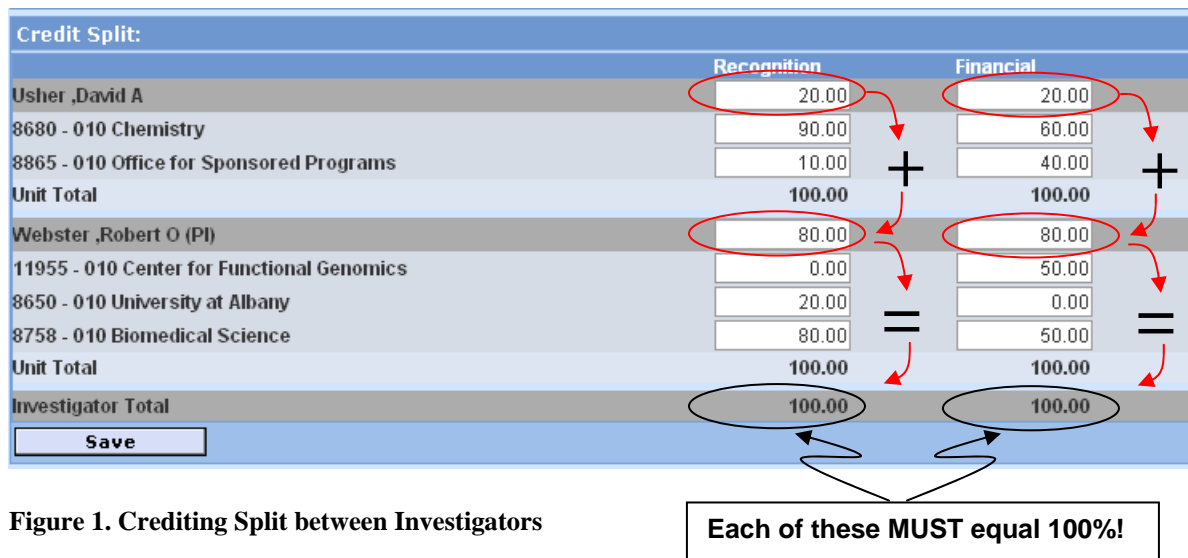


Figure 1. Crediting Split between Investigators

Split Academic *Recognition* credit

1. Select the field on the dark grey line, to the right of the Principal Investigator, beneath the **Recognition** heading.
2. Enter the percent Academic **Recognition** credit assigned to the Principal Investigator. As the percentages are not used to report a degree of contribution, simply enter the same numbers in the **Recognition** column as were entered in the **Financial** column.
3. Repeat the steps above for all Co-Investigators. Make sure that the sum of them equals 100%.

Divide each Investigators credit among his/her Units

Additionally, each Investigator's effort must be allocated to the Unit(s) assigned to that Investigator. An Investigator may have multiple Units assigned due to academic appointment(s), or to specifically include additional Units for Academic **Recognition** or **Financial** credit. The Credit Split window is populated with all Investigators (PI's and Co-PI's) and the Unit(s) that were included on the Investigator Tab. When the screen is first opened, all fields will default to 0%.

The light grey bars represent an Investigator's distribution of credit among his/her own Unit(s). Under each Investigator, his/her credit must be divided and the sum of the credit under each Investigator must equal 100%. This sum is displayed in the **Unit Total** line under each Investigator. See Figure 2.

Credit Split:		
	Recognition	Financial
Usher ,David A	20.00	20.00
8680 - 010 Chemistry	90.00	60.00
8865 - 010 Office for Sponsored Programs	10.00	40.00
Unit Total	100.00	100.00
Webster ,Robert O (PI)	80.00	80.00
11955 - 010 Center for Functional Genomics	0.00	50.00
8650 - 010 University at Albany	20.00	0.00
8758 - 010 Biomedical Science	80.00	50.00
Unit Total	100.00	100.00
Investigator Total	100.00	100.00
<input type="button" value="Save"/>		

Each of these must equal 100%!

Figure 2. Credit Split between an Investigator's units

Note: The **Financial** credit for each investigator can be different than their **Recognition** credit but both must total 100% for the proposal. Even if 0% **Financial** credit is desired for an Investigator, the **Unit Total** for that Investigator must still equal 100%.

In Figure 3. below, you will find an example of a completed credit split entry, where the **Financial** credit is different than the Academic **Recognition** credit. To calculate the net ICR generated from this project for each of the Units listed in this proposal, multiply the Investigator's individual credit by each of his/her Unit credits.

Credit Split:		
	Recognition	Financial
Usher ,David A	20.00	20.00
8680 - 010 Chemistry	90.00	60.00
8865 - 010 Office for Sponsored Programs	10.00	40.00
Unit Total	100.00	100.00
Webster ,Robert O (PI)	80.00	80.00
11955 - 010 Center for Functional Genomics	0.00	50.00
8650 - 010 University at Albany	20.00	0.00
8758 - 010 Biomedical Science	80.00	50.00
Unit Total	100.00	100.00
Investigator Total	100.00	100.00
<input type="button" value="Save"/>		

Figure 3. An example of a completed Credit Split entry

In Figure 3, the results of the ICR calculations would be as follows:

Chemistry:	20% x 60%	=	12%
Office for Sponsored Programs:	20% x 40%	=	8%
Center for Functional Genomics:	80% x 50%	=	40%

University at Albany:	80% x 0%	=	0%
Biomedical Science:	80% x 50%	=	<u>40%</u>
Total:			100%

Removing Investigators and/or Units from the Credit Split Window

The people and units in the Credit Split window are based on the information entered on the proposal's Investigator tab. If changes are needed, close the Credit Split window and make the adjustments on the Investigator tab, then save the proposal and re-open the Credit Split window.