

# HSSAC Research Space Review

Instructional Guide



# Agenda

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# Introduction

## Purpose of the Review

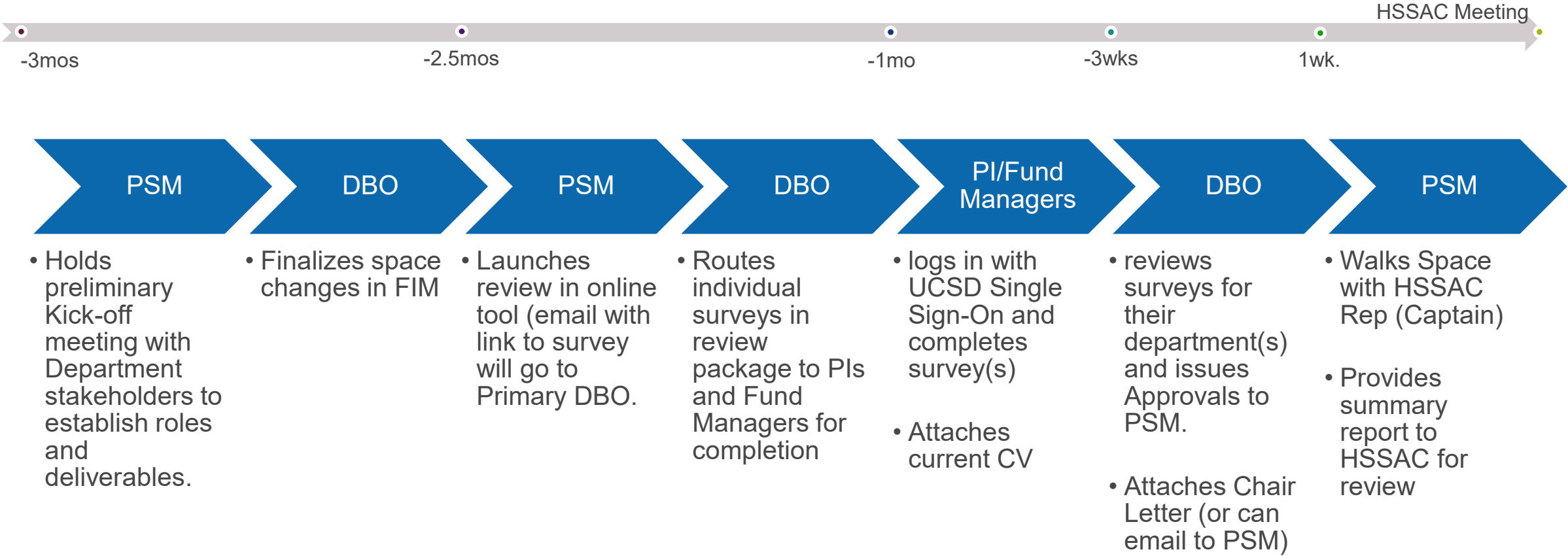
The Health Sciences Space Advisory Committee (“HSSAC”) conducts periodic research space reviews (approximately annually) for departments and organized research unit (ORU) to measure productivity in university-owned research space.

In 2017, the review mechanism (surveys) shifted from paper-based to an on-line tool. The data collection categories remain the same as does the importance of responding by the deadline with accurate and complete information. HSSAC makes space allocation recommendations (including reallocation of space) to the Vice Chancellor based on these research space reviews.

The Planning and Space Management (“PSM”) team is here to help. Contact us with any questions – [prmcas@ucsd.edu](mailto:prmcas@ucsd.edu)

# Introduction

## Process/Roles/Timeline



# Online Space Review Tool

<https://som.ucsd.edu/space>

The screenshot shows a web browser window with the URL <https://som.ucsd.edu/space/views/survey/search.html>. The page features a dark blue header with the text "RESEARCH SPACE REVIEW" and the UC San Diego logo. A navigation bar below the header includes links for Home, Reviews, Reports, Admin, Help, and Logout. The main content area displays "Surveys for KERSEY, KRISTIN A" with a dropdown menu labeled "Select Review". A welcome message box titled "Welcome To Space" states: "Research Space Review is a web based application designed exclusively for the Vice Chancellor Health Sciences departments for the purpose of Physical Resource Management and Capital Asset Strategies." The footer contains the text "Health Sciences | UC San Diego, Health Sciences" and the UC San Diego logo.

Requires Business Systems or AD Sign on

# Selecting Space Review & Survey

Choose department space review

Choose faculty member to edit

## Surveys for DENG, WEI

Select Review

Select Review

Pharmacology - July, 2019

Pharmacology - January 2018

## Surveys for KERSEY, KRISTIN A






Pharmacology - January 2018

### Surveys (Click on a row)


Survey	CV	Space Status	Fund Status
ADAMS, JOSEPH A.	✓	DBO Approved	DBO Approved
BROWN, JOAN HELLER	✓	DBO Approved	Initial
BRUNTON, LAURENCE L	✓	DBO Approved	DBO Approved
DANEMAN, RICHARD	✓	DBO Approved	Initial
DENG, WEI	✓	DBO Approved	DBO Approved
DENNIS, EDWARD A.	✓	DBO Approved	Initial
DIXON, JACK E	✓	DBO Approved	DBO Approved
GONZALEZ, DAVID J	✓	DBO Approved	DBO Approved
INSEL, PAUL A.	✓	DBO Approved	DBO Approved
JOINER, WILLIAM J	✓	DBO Approved	DBO Approved
KARIN, MICHAEL	✓	DBO Approved	Initial
LEFFERT, HYAM LERNER	✓	DBO Approved	Initial
MIYAMOTO, SHIGEKI	✓	DBO Approved	DBO Approved
MURPHY, ANNE NEVILLE	✓	DBO Approved	DBO Approved
NEWTON, ALEXANDRA C.	✓	DBO Approved	DBO Approved
PURCELL, NICOLE H	✓	DBO Approved	DBO Approved
SUNAHARA, ROGER KEN	✓	DBO Approved	DBO Approved
TAYLOR, SUSAN S.	✓	DBO Approved	DBO Approved
TREJO, JOANN	✓	DBO Approved	DBO Approved
TUKEY, ROBERT H	✓	DBO Approved	DBO Approved

# Survey Sections

PI:	Department:	Survey name:	Start Date:	Due Date:	Survey ID:
BREWER, JAMES BRIAN	Radiology	Radiology - Nov. 2017 Space Review	Sep 18, 2017	Oct 16, 2017	323

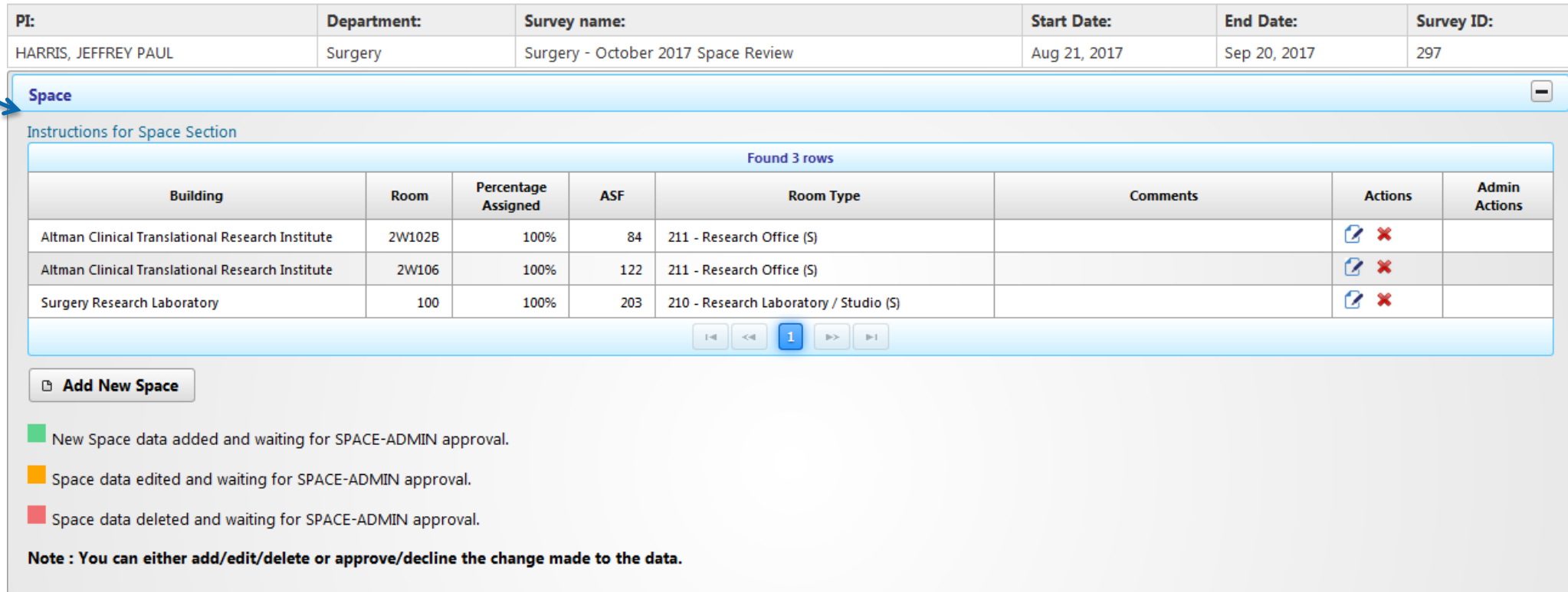
- Space 
- Other People Working in the Space 
- All Funds 
- Comments 
- Attachments 

- [Decline Space](#)
- [Approve Space](#)
- [Decline Funding](#)
- [Approve Funding](#)
- [Approve and Lock](#)
- [Delete Survey](#)

[Generate Survey Report](#) 

# Space







- Pre-populated list of offices and/or labs assigned to the PI in Facilities Information Management (FIM) [ucsd.tririga.com](http://ucsd.tririga.com)
- Click on “Instructions” for more detail



The screenshot displays the 'Space' section of the FIM system. At the top, a header table provides details for the current user and survey:

PI:	Department:	Survey name:	Start Date:	End Date:	Survey ID:
HARRIS, JEFFREY PAUL	Surgery	Surgery - October 2017 Space Review	Aug 21, 2017	Sep 20, 2017	297

Below this is a section titled 'Space' with a sub-header 'Instructions for Space Section'. It indicates 'Found 3 rows' and contains a table with the following data:

Building	Room	Percentage Assigned	ASF	Room Type	Comments	Actions	Admin Actions
Altman Clinical Translational Research Institute	2W102B	100%	84	211 - Research Office (S)		 	
Altman Clinical Translational Research Institute	2W106	100%	122	211 - Research Office (S)		 	
Surgery Research Laboratory	100	100%	203	210 - Research Laboratory / Studio (S)		 	

Below the table is a navigation bar with buttons for first, previous, current (1), next, and last. An 'Add New Space' button is located below the table. A legend at the bottom explains the status of new, edited, and deleted data, and includes a note: 'Note : You can either add/edit/delete or approve/decline the change made to the data.'



# Editing Space

- Click the edit icon for the space to be edited
- % assigned to that PI
- We discourage you from changing the room type
- Enter comments to explain changes

The screenshot displays a web interface for managing spaces. At the top, there is a header 'Space' and a sub-header 'Instructions for Space Section'. Below this is a table with columns 'Building', 'Room', and 'Percentage Assigned'. Two rows are visible, both for 'School of Medicine Building 1' with rooms 103 and 105. To the right of the table is a table with columns 'Comments', 'Actions', and 'Admin Actions'. The 'Actions' column contains edit (pencil) and delete (red X) icons. A blue arrow points to the edit icon in the first row of the 'Actions' column. In the foreground, an 'Add/Edit Space' modal dialog is open, showing fields for 'Building' (School of Medicine Building 1), 'Room' (103), 'Percentage Assigned \*' (1.00), 'Room Type \*' (320 - Administrative Office (S)), and 'Comments'. The dialog has 'Update' and 'Cancel' buttons at the bottom.

Building	Room	Percentage Assigned
School of Medicine Building 1	103	
School of Medicine Building 1	105	

Comments	Actions	Admin Actions

**Add/Edit Space**

Building: School of Medicine Building 1

Room: 103

Percentage Assigned \*: 1.00

Room Type \*: 320 - Administrative Office (S)

Comments:

**Update** **Cancel**

# Deleting Space

- Click the delete icon for the space to be deleted
- Confirm that you want to delete the space from this survey

Space

Instructions for Space Section

Found 2 rows

Building	Room	Percentage Assigned	ASF	Room Type	Comments	Actions	Admin Actions
School of Medicine Building 1	103	100%	112	320 - Administrative Office (S)			
School of Medicine Building 1	105	100%	139				

**Delete Space**

Delete Cancel

**Add New Space**

- New Space data added and waiting for SPACE-ADMIN approval.
- Space data edited and waiting for SPACE-ADMIN approval.
- Space data deleted and waiting for SPACE-ADMIN approval.

**Note :** You can either add/edit/delete or approve/decline the change made to the data.

Note: make sure you increase/add this space on corresponding survey (another PI or Department Unassigned or Department Shared)

# Adding Space

The screenshot shows a web application interface for managing space. The main window is titled 'Space' and contains a table with the following data:

Building	Room	Percentage Assigned	ASF
Altman Clinical Translational Research Institute	2W102B	100%	84
Altman Clinical Translational Research Institute	2W106	100%	122
Surgery Research Laboratory	100	100%	203

Below the table is an 'Add New Space' button. To the right, an 'Add/Edit Space' dialog box is open, containing the following fields:

- Building: Select Building (dropdown menu)
- Room: (dropdown menu)
- Percentage Assigned \*: e.g., enter 0.16 for 16% (text input)
- Room Type \*: Select (dropdown menu)
- Comments: (text area)

At the bottom of the dialog are 'Add' and 'Cancel' buttons. The main window also includes a legend for status indicators (green, yellow, red) and a note: 'Note : You can either add/edit/delete or approve/decline the change made to the d'.

- Click on “Add New Space”
- Select a building from the drop-down menu (buildings included in the review)
- Select a room number from the drop-down menu
- Enter the % occupancy (in decimals)
- We discourage you from changing the room type
- Enter Comments (explaining the change)

Note: make sure you decrease/delete this space on corresponding survey (another PI or Department Unassigned or Department Shared)

# Employees – list all paid UCSD employees working in the space

- Click on “Add New Employee”
- Start to enter the full last and first name of the employee
- The cell will auto-populate based on UC Path
- Enter the % time (in decimals) the employee works in the reviewed space
- Enter comments (if necessary)

The screenshot displays a web application interface for managing employees. The main window is titled "Other People Working in the Space" and contains several sections: "Employees" (with a sub-section "Unpaid Staff"), "All Funds", and "Comments". A prominent "Add New Employee" button is visible. An "Add/Edit Employee" modal form is overlaid on top, featuring the following fields:

- Name [Last, First Middle] \***: A text input field with a placeholder "Type part of the name (last, first)". Below it, a red instruction reads: "Enter first three or more letters in [Last, First Middle] format and select from drop down".
- % Time in space \***: A text input field with a placeholder "e.g., enter 0.16 for 16%".
- Comments**: A large text area for entering notes.

At the bottom of the modal are "Submit" and "Cancel" buttons. The background interface also includes buttons for "Decline Space", "Approve Space", and "Generate Survey Report" (with a PDF icon).

# Unpaid Staff– list all unpaid persons working in the space

- Click on “Add New Unpaid Staff”
- Unpaid staff includes:
  - Volunteers
  - Visiting Scholars
  - Affiliates
  - Anyone working in the space that is not a UCSD employee
- Enter the last and first name of the person
- Enter the % time (in decimals) in the reviewed space
- Enter comments (if necessary)

The screenshot displays a web interface for managing staff. The main window is titled "Other People Working in the Space" and has two tabs: "Employees" and "Unpaid Staff". The "Unpaid Staff" tab is active, showing a section titled "Unpaid Staff" with the instruction "Instructions for Unpaid Staff Section" and a button labeled "Add New Unpaid Staff". Below this are sections for "All Funds" and "Comments". A modal window titled "Add/Edit Unpaid Staff" is open, containing the following fields:

Add/Edit Unpaid Staff	
Name [Last, First Middle] *	<input type="text"/>
% Time in space *	<input type="text" value="e.g., enter 0.16 for 16%"/>
Comments	<input type="text"/>

At the bottom of the modal are "Submit" and "Cancel" buttons.

# Funding

**All Funds**

Use the following section to list funding for your research in the spaces listed previously. The funding must be currently active as of the date this survey was distributed. If the grant or contract has expired, do not include it on the survey response. For grants and contracts that are in a no-cost-extension status, include the total amount of direct cost remaining of unspent no-cost-extension dollars.

**Add Fund**

**Fund Type**

Select

- Select
- Awarded**
- PI Grants
- Program Projects and Center Grants
- Grant Support for Faculty Working in Your Space
- Fellowship Support
- Training Grant Support
- Additional**
- Clinical Trials
- Laboratory Service Agreements
- Recharge Core
- Other Funds
- Pending**
- Pending Funds

# General Guidelines

- **The goal of the space review is to use current funding to estimate funding for the next year**
- **All awards and funding need to be active at the time the survey is submitted**
- UCSD Project and Task Numbers are required for all funding
  - Use Notice of Award (“NOA”) for awards (grants, program center / project, funding for people working in your space)
  - Use ORACLE for clinical trials, subaward (received at UCSD), recharge, Lab Service Agreements (“LSA”), fellowships, awards in NCE
- “Total Project Direct Cost” – Direct costs for full project period
- “Previous 12 Month Direct Costs in Space” – Reporting of current award period for awards or 12 month lookback of actuals (Review Period) -- direct costs received by / allocated to UCSD for work in the space being reviewed. (See previous slide for Review Period explanation).
  - For grants that are currently active at the time of the reporting, provide annual direct costs awarded
  - For grants that are in no-cost extension, provide the carry forward amount only
  - For clinical trials or recharge accounts that accrue monthly, report the total direct cost income over the previous 12 months
- *If information cannot be validated it is excluded*

# Review Period Defined

PI:	Department:	Survey name:	Start Date:	End Date:	Survey ID:
HATTANGADI GLUTH, JONA	Radiation Medicine and Applied Sciences	Radiation Medicine and Applied Sciences	Sep 18, 2017	Oct 16, 2017	315

- **Review Period** – Use ORACLE for clinical trials, subaward (received at UCSD), recharge, Lab Service Agreements (“LSA”), and fellowships is a 12 month lookback ending the month of the due/end date of the survey (email communications and survey tool show this date) -Example:
  - Survey End Date (due date) – Oct 16, 2017
  - **Review Period** – November 1, 2016 – October 31, 2017
- Award Dates – Awards entered must be active the month the survey is submitted
  - New Awards – If funding has not arrived at UCSD during the Review Period, record the award in the Pending Awards section
  - Expired Awards – Awards that end at any point during the Review Period are excluded



# Direct Cost Reporting

- Use Notice of Award (“NOA”) for awards (grants, program center / project, funding for people working in your space)
  - For grants that are currently active at the time of the reporting, provide annual direct costs awarded
  - For grants that are in no-cost extension, please follow the Direct Revenue Reporting instructions

NOA

SECTION I – AWARD DATA – [REDACTED]

Award Calculation (U.S. Dollars)

Salaries and Wages	\$212,310
Fringe Benefits	\$90,526
Personnel Costs (Subtotal)	\$302,836
Consultant Services	\$30,000
Materials & Supplies	\$16,600
Other	\$2,870

Federal Direct Costs	\$352,306
Federal F&A Costs	\$193,768
Approved Budget	\$546,074
Total Amount of Federal Funds Obligated (Federal Share)	\$546,074
<b>TOTAL FEDERAL AWARD AMOUNT</b>	<b>\$546,074</b>

AMOUNT OF THIS ACTION (FEDERAL SHARE) \$546,074

SUMMARY TOTALS FOR ALL YEARS		
YR	THIS AWARD	CUMULATIVE TOTALS
1	\$546,074	\$546,074
2	\$586,684	\$586,684
3	\$593,969	\$593,969
4	\$590,094	\$590,094

Recommended future year total cost support, subject to the availability of funds and satisfactory progress of the project

Fiscal Information:

CFDA Name: [REDACTED]  
 CFDA Number: [REDACTED]  
 EIN: [REDACTED]  
 Document Number: [REDACTED]  
 PMS Account Type: P (Subaccount)  
 Fiscal Year: 2017

IC	CAN	2017	2018	2019	2020
MD	8472687	\$546,074	\$586,684	\$593,969	\$590,094

Recommended future year total cost support, subject to the availability of funds and satisfactory progress of the project

NIH Administrative Data:

PCC: CHS-02JA / OC: 414A / Released: GRANTP 09/19/2017  
 Award Processed: 09/20/2017 07:06:11 PM

# Direct Revenue Reporting

Use ORACLE for clinical trials, subaward, recharge, Lab Service Agreements (“LSA”), fellowships

For clinical trials or recharge accounts that accrue monthly, report the total Direct Cost income over the previous 12 months, or if no revenue, list expenses over the previous 12 months

Accounting Period: choose date range to match Review Period

Currently using the following reports to validated revenue

- UCSD-DSH Project Balances with Expenditure Details Dashboard (Doesn't always show revenue so that is why we pull the General Ledger)
- General Ledger Panorama (If you know the account code, list it in the comments)

# Awarded Funds

PI Grants and Contracts

Program Projects and Center Grants

Grant Support for Faculty

Fellowship Support

Training Grant Support

The screenshot shows a web interface for entering funding information. At the top, a blue header reads "All Funds". Below it, a text box contains the instruction: "Use the following section to list funding for your research in th include it on the survey response. For grants and contracts tha". A section titled "Add Fund" contains a "Fund Type" dropdown menu. The dropdown is open, showing a list of options: "Select", "Awarded", "PI Grants", "Program Projects and Center Grants", "Grant Support for Faculty Working in Your Space", "Fellowship Support", and "Training Grant Support".

# PI Grants and Contracts

- PI is the primary awardee on the grant
  - If Co-PI note in comments
- Award is active (not pending or expired)
  - If a no-cost extension note in the comments and use the instructions on slides 18 &19
- Active UCSD project number required
- “Previous 12 Month Direct Costs in Space” – **Current Award Period - Use Notice of Award (“NOA”)** for awards (grants, program center / project, funding for people working in your space)
  - See Slide 17 (for example of NOA)

### Instructions for 'PI Grants and Contracts'

List all individual research grants and contracts on which you serve as principal investigator (RO1s, NSF, pharmaceutical company pre-clinical contracts, PI initiated Clinical Trials, etc.). Only include those annual direct costs that occur in the space listed in the space section previous. Pro-rate the annual direct cost, if necessary, to report only those annual direct costs that actually happen in the space listed in the space section above during the review period. Do not include activities that are operating in spaces other than those listed above.

#### Add/Edit PI Grant and Contracts

Name [Last, First Middle] *	<input type="text" value="Type part of the name (last, first)"/>
Issuing Inst Grant # *	<input type="text"/>
Grant Title *	<input type="text"/>
UCSD Index	<input type="text"/>
UCSD Accounting Fund #	<input type="text"/>
OFC Project *	<input type="text"/>
OFC Project Name	<input type="text"/>
OFC Task *	<input type="text"/>
OFC Task Name	<input type="text"/>
Project Start Date *	<input type="text"/>
Project End Date *	<input type="text"/>
Total Project Direct Cost *	<input type="text"/>
Annual Direct Cost In Space *	<input type="text"/>
Comments	<input type="text"/>

# Program Projects and Center Grants

**Instructions for 'Program Projects and Center Grants'.**

List your participation in Program Projects, Center Grants, etc. Only list those components that happen in the space listed on the space section above. If you are the principal investigator or program director, include only annual direct cost activity that happens in the space listed in the space section above, not dollars budgeted to other investigators for their projects or subcontracted to those at other universities. Pro-rate the annual direct cost, if necessary, to report only those annual direct costs that actually happen in the space listed in the space section above during the review period. Do not include activities that are operating in spaces other than those listed above.

**Add/Edit Program Projects and Center Grants**

Name [Last, First Middle] *	<input type="text" value="Type part of the name (last, first)"/>
Issuing Inst Grant # *	<input type="text"/>
Grant Title *	<input type="text"/>
UCSD Index	<input type="text"/>
UCSD Accounting Fund #	<input type="text"/>
OFC Project *	<input type="text"/>
OFC Project Name	
OFC Task *	<input type="text" value="▼"/>
OFC Task Name	
Project Start Date *	<input type="text"/>
Project End Date *	<input type="text"/>
Total Project Direct Cost *	<input type="text"/>
Annual Direct Cost In Space *	<input type="text"/>
Comments	<input type="text"/>

- Award for Program operating in the space
  - Example: CTRI Grant
- Award is active (not pending or expired)
  - If a no-cost extension note in comments
- Active UCSD project number required
  - If sub-awardee note project number in comments
    - use the instructions on slides 18 &19
- “Previous 12 Month Direct Costs in Space” – **Current Award Period - Use Notice of Award (“NOA”)** for awards (grants, program center / project, funding for people working in your space)
  - See Slide 17

# Grant Support for Faculty in Space

- Junior Faculty are the primary awardees on the grants
  - If Co-PI note in comments
  - Awardee names verified with employees in space
- Award is active (not pending or expired)
  - If a no-cost extension note in comments
- Active UCSD project number required
  - If sub-award note project in comments
- “Previous 12 Month Direct Costs in Space” – Current Award Period - Use Notice of Award (“NOA”) for awards (grants, program center / project, funding for people working in your space)
  - See Slide 17

**Instructions for 'Grant Support for Faculty' working in your space**

List grants/awards for faculty who use the space in the space section above. The awardee should be included in the “Other People Working in the Space” section. Pro-rate the annual direct cost, if necessary, to report only those annual direct costs that actually happen in the space listed in the space section above during the review period. Do not include activities that are operating in spaces other than those listed above.

**Add/Edit Grant Support for Faculty Working in Your Space**

Name [Last, First Middle] *	<input type="text" value="Type part of the name (last, first)"/>
Issuing Inst Grant # *	<input type="text"/>
Grant Title *	<input type="text"/>
UCSD Index	<input type="text"/>
UCSD Accounting Fund #	<input type="text"/>
OFC Project *	<input type="text"/>
OFC Project Name	<input type="text"/>
OFC Task *	<input type="text"/>
OFC Task Name	<input type="text"/>
Project Start Date *	<input type="text"/>
Project End Date *	<input type="text"/>
Total Project Direct Cost *	<input type="text"/>
Annual Direct Cost In Space *	<input type="text"/>
Comments	<input type="text"/>

# Fellowship Support

## Instructions for 'Fellowship Support' in your space.

List fellowship support provided to graduate or postdoctoral students, listed in the "Other People Working in the Space" section, working in the space, listed in the space section. Pro-rate the annual direct cost, if necessary, to report only those annual direct costs that actually happen in the space listed in the space section above during the review period. Do not include activities that are operating in spaces other than those listed above.

### Add/Edit Fellowship Support

Fellow Name *	<input type="text"/>
Title *	<input type="text"/>
UCSD Index	<input type="text"/>
UCSD Accounting Fund #	<input type="text"/>
OFC Project *	<input type="text"/>
OFC Project Name	
OFC Task *	<input type="text"/>
OFC Task Name	
% Time in space *	<input type="text" value="1.00"/>
12-Month Direct Revenue *	<input type="text"/>
Comments	<input type="text"/>

Submit

Cancel

- Salary support awarded to Fellows
- Award is active (not pending or expired)
  - If a no-cost extension note in comments
- Active UCSD project number required
- "Previous 12 Month Direct Costs in Space" -- 12 month lookback (Review Period) of direct costs awarded/allocated to UCSD for work in the space being reviewed. (See slide 18 & 19 Review Period explanation).



# Training Grant Support

- Grants for Training Support
- Award is active (not pending or expired)
  - If a no-cost extension note in comments
- Active UCSD project number required
- “Previous 12 Month Direct Costs in Space” -- 12 month lookback (Review Period) of direct costs awarded/allocated to UCSD for work in the space being reviewed. (See slide 18 & 19 Review Period explanation).

**Instructions for 'Training Grant' support in your space.**

List trainee support provided to graduate or postdoctoral students, listed in the “Other People Working in the Space” section, working in the space, listed in the space section. Include training grant stipends and research allowances. If you are the director of a training grant, list only the value of those stipends awarded to students/fellows working in the space listed in the space section above. Do not include support received for journal operation, for textbook editing, for meeting/conference development or for training grant administration (these funds are not considered to support functions requiring research laboratory space) Pro-rate the annual direct cost, if necessary, to report only those annual direct costs that actually happen in the space listed in the space section above during the review period. Do not include K-awards training grants in this section; K-awards should be listed in 'Grant Support for Faculty in Space'.

**Add/Edit Training Grant Support**

Trainee Name *	<input type="text"/>
Title *	<input type="text"/>
UCSD Index	<input type="text"/>
UCSD Accounting Fund #	<input type="text"/>
OFC Project *	<input type="text"/>
OFC Project Name	<input type="text"/>
OFC Task *	<input type="text"/>
OFC Task Name	<input type="text"/>
% Time in space *	<input type="text" value="1.00"/>
12-Month Direct Revenue *	<input type="text"/>
Comments	<input type="text"/>



# Additional Funds

Clinical Trials

Laboratory Service Agreements

Recharge Core

Other Funds

**All Funds**

Use the following section to list funding for your research in the include it on the survey response. For grants and contracts that a

**Add Fund**

**Fund Type**

Select

**Awarded**

- PI Grants
- Program Projects and Center Grants
- Grant Support for Faculty Working in Your Space
- Fellowship Support
- Training Grant Support

**Additional**

- Clinical Trials
- Laboratory Service Agreements
- Recharge Core
- Other Funds

The screenshot shows a web form titled "All Funds" with instructions to list funding. Under the "Add Fund" section, there is a "Fund Type" dropdown menu. The dropdown is open, showing two categories: "Awarded" and "Additional". The "Additional" category is circled in red and contains the following options: Clinical Trials, Laboratory Service Agreements, Recharge Core, and Other Funds.

# Clinical Trials

**Instructions for 'Clinical Trials' support in your space.**

List your participation in currently active clinical trials and studies administered through the Clinical Trials Office. Includes industry initiated clinical trials (PI initiated clinical trials should be captured in the PI Awarded Funds section. The clinical trial activity must occur in the space listed in the space section above. Only report clinical trial revenue generated during the review period. Do not include activities that are operating in spaces other than those listed above.

**Add/Edit Clinical Trial**

Name [Last, First Middle]	<input type="text" value="Type part of the name (last, first)"/>
Clinical Trial # *	<input type="text"/>
Clinical Trial Title *	<input type="text"/>
UCSD Index	<input type="text"/>
UCSD Accounting Fund #	<input type="text"/>
OFC Project *	<input type="text"/>
OFC Project Name	
OFC Task *	<input type="text" value=""/>
OFC Task Name	
Project Start Date *	<input type="text"/>
Project End Date *	<input type="text"/>
12-Month Direct Revenue *	<input type="text"/>
Comments	<input type="text"/>

- PI is the primary awardee on the clinical trial
  - If Co-PI note in comments
- Includes industry initiated clinical trials (PI initiated clinical trials should be captured in the PI Awarded Funds section)
- Award is active (not pending or expired)
  - If a no-cost extension note in comments
- Active UCSD project number required
- “Previous 12 Month Direct Costs in Space” -- 12 month lookback (Review Period) of direct costs awarded/allocated to UCSD for work in the space being reviewed. (See slide 18 & 19 Review Period explanation).

# Laboratory Service Agreements (LSA)

- PI is the named provider in the LSA
- Award is active (not pending or expired)
  - If a no-cost extension note in comments
- Active UCSD project number required
- “Previous 12 Month Direct Costs in Space”  
-- 12 month lookback (Review Period) of direct costs awarded/allocated to UCSD for work in the space being reviewed. (See slide 18 & 19 Review Period explanation).

**Instructions for 'Lab Service Agreements' in your space.**

List your participation in currently active Laboratory Service Agreements administered through Business Contracts. The Lab Service Agreement activity must occur in the space listed in the space section above. Only report Lab Service Agreement revenue generated during the review period. Do not include activities that are operating in spaces other than those listed above.

**Add/Edit Lab Service Agreement**

Name [Last, First Middle]	<input type="text" value="Type part of the name (last, first)"/>
UCSD Department *	<input type="text" value="Department"/>
ID Number *	<input type="text"/>
UCSD Index	<input type="text"/>
UCSD Accounting Fund #	<input type="text"/>
Organization	<input type="text"/>
OFC Project *	<input type="text"/>
OFC Project Name	<input type="text"/>
OFC Task *	<input type="text"/>
OFC Task Name	<input type="text"/>
Status *	<input type="text" value="Select"/>
Initial Expire *	<input type="text"/>
Annual Direct Cost In Space *	<input type="text"/>
Comments	<input type="text"/>

# Recharge Core

**Instructions for 'Recharge Cores' in your space.**

List currently active Recharge Core units on which you are a principal investigator, manager, or director. Only include Recharge Cores activities that happen in the space listed in the space section above. If the Recharge Core has space assigned to it specifically, the Core manager will receive a separate survey. Only report Core Recharge revenue generated during the review period. Do not include activities that are operating in spaces other than those listed above.

**Add/Edit Recharge Core**

Name [Last, First Middle] *	<input type="text" value="Type part of the name (last, first)"/>
Recharge Core Unit Name *	<input type="text"/>
Recharge Unit Description *	<input type="text"/>
UCSD Index	<input type="text"/>
UCSD Accounting Fund #	<input type="text"/>
OFC Project *	<input type="text"/>
OFC Project Name	<input type="text"/>
OFC Task *	<input type="text"/>
OFC Task Name	<input type="text"/>
Revenue Generated in Previous 12 Months *	<input type="text"/>
Comments	<input type="text"/>

- PI is the sponsoring faculty member of the recharge core
- The recharge core operates in space being reviewed
- Core is active (not pending or expired)
- Active UCSD project number required
- “Previous 12 Month Direct Costs in Space” -- 12 month lookback (Review Period) of direct costs awarded/allocated to UCSD for work in the space being reviewed. (See slide 18 & 19 Review Period explanation).

# Other Funds

- This can include:
  - Bridge Funding
  - Start-Up Funds
  - Endowments
  - Gift Funds
  - Academic Senate Grants
- Award is active (not pending or expired)
  - If a no-cost extension note in comments
- Active UCSD project number required
- “Previous 12 Month Direct Costs in Space” -- 12 month lookback (Review Period) of direct costs awarded/allocated to UCSD for work in the space being reviewed. (See slide 18 & 19 Review Period explanation).

**Instructions for 'Other Funds' in your space.**

List any other active funding not covered in categories listed above for consideration (such as start-up funds, discretionary funds, Academic Senate Grants, etc.). The annual direct cost activity or revenue generated must occur in the space listed on the space section above during the review period. Do not include activities that are operating in spaces other than those listed above.

**Add/Edit Other Funds**

Name [Last, First Middle]	<input type="text" value="Type part of the name (last, first)"/>
Description *	<input type="text"/>
UCSD Index	<input type="text"/>
UCSD Accounting Fund #	<input type="text"/>
OFC Project *	<input type="text"/>
OFC Project Name	<input type="text"/>
OFC Task *	<input type="text"/>
OFC Task Name	<input type="text"/>
Revenue Generated in Previous 12 Months *	<input type="text"/>
Comments	<input type="text"/>

# Pending Funds

**All Funds**

Use the following section to list funding for your research in the survey response. For grants and contracts that you have not yet received, select "Pending Funds" from the dropdown menu.

**Add Fund**

**Fund Type**

Select

- Select
- Awarded**
- PI Grants
- Program Projects and Center Grants
- Grant Support for Faculty Working in Your Space
- Fellowship Support
- Training Grant Support
- Additional**
- Clinical Trials
- Laboratory Service Agreements
- Recharge Core
- Other Funds
- Pending**
- Pending Funds

# Pending Funds

## Instructions for 'Pending Funds' in your space.

Use the following table to list pending funds including a) successful application for award but funds are not yet received by UCSD during Review Period. Attach NOA to survey or b) Application / proposal for funds has been submitted but award status is unknown. Use the comment section to explain or provide additional information.

### Add/Edit Pending Funds

Name [Last, First Middle] *	<input type="text" value="Type part of the name (last, first)"/>
Agency/Funding Title *	<input type="text"/>
Date Submitted *	<input type="text"/>
Proposed Funding Start Date *	<input type="text"/>
Proposed Funding End Date *	<input type="text"/>
Estimated Total Direct Cost *	<input type="text"/>
Estimated Total Annual Cost *	<input type="text"/>
Comments	<input type="text"/>

- Two scenarios to include in the Pending Section:

- 1) Successful application for award but funds are not yet received by UCSD during Review Period. Attach NOA to survey.
- 2) Application / proposal for funds has been submitted but award status is unknown

Use comments to explain or provide additional details.



# Funding Summary for PI

Fund Type	PI Name	Issuing Inst Grant#	Grant Title	UCSD Acct Fund#	Project	Task	Start Date	End Date	Total Project Cost	Annual Direct Cost In Space	Comments	Actions
PI Grants		1K99AA027835-01	Identification and Characterization of Novel Genetic Mechanisms in Alcohol Use Disorder and Excessive Drinking			1 - Niaaa 1 K99 Aa02	Sep 20, 2019	Aug 31, 2024	\$300,989	\$150,505	year 1 award. Recipient is 100% in	
PI Grants		1R01AA026281-01A1	A Novel Pharmacotherapy for Alcoholism: Evaluation of Reward, Aversion, Compulsivity, Withdrawal & Reinstatement				Jul 5, 2018	Apr 30, 2019	\$1,545,750	\$309,150		
PI Grants		1P50DA037844	Center for Genetic Studies of Drug Abuse in Outbred Rats			9 - Phs Nih P50Da037844	Jul 15, 2019	Apr 30, 2024	\$260,209	\$260,209	This is the carry forward from the previous P50 award	
Program Projects and Center Grants		P50DA037844	Center for Genetic Studies of Drug Abuse in Outbred Rats				Jun 15, 2014	Apr 30, 2019	\$10,695,001	\$783,537	P50. Validated - Department changes Annual DC from \$1,770,163 to \$1,609,884 year 7 numbers listed. year 8 starts May 1, 2020	
Pending Funds			Genetic relationship between impulsivity and nicotine abuse 28IR-0070				Jul 1, 2018	Jun 30, 2021	\$749,345	\$249,935	year 2 allocation. Year 3 funds will be released in July	
PI Grants		U01 DA043098	Genetics of Novelty seeking and Propensity for drug abuse in outbred rats			1 - FFT NIH UMICH PO3005955244	May 1, 2017	Feb 28, 2022	\$347,936	\$95,056		

- Identifying information removed (PI Name, Issuing Grant #, Grant Title, and Project Number)



# Comments

- Please include any additional comments that should be included / presented to the Health Sciences Space Advisory Committee

Comments ▮

**Add Comments**

# Attachments

- Each PI should attach a copy of their Curriculum Vitae (CV)
  - You can browse your files and choose the CV
  - Once chosen click the upload button and it will be included with the Space Survey.
- Attach NOA, Agreements, Commitment Letters, screen shots, etc. to explain financial entries

## Attachments

Click the 'Choose' button to browse your computer for a CV or other file to attach. Click the 'Upload' button to attach the document to this survey.

+ Choose

↗ Upload

⊘ Cancel

# Survey Approval

- Initial – Information can be entered by anyone with access (access is enabled by PSM team)

- PI Approved – locked to PI

- Department Approved – locked to PI and DBO

- Admin Approved – Final approval, locked to everyone

Surveys for KERSEY, KRISTIN A

Pharmacology - January 2018

Surveys (Click on a row)

Survey	CV	Space Status	Fund Status
ADAMS, JOSEPH A.	✓	DBO Approved	DBO Approved
BROWN, JOAN HELLER	✓	DBO Approved	Initial
BRUNTON, LAURENCE L	✓	DBO Approved	DBO Approved
DANEMAN, RICHARD	✓	DBO Approved	Initial
DENG, WEI	✓	DBO Approved	DBO Approved
DENNIS, EDWARD A.	✓	DBO Approved	Initial
DIXON, JACK E	✓	DBO Approved	DBO Approved
GONZALEZ, DAVID J	✓	DBO Approved	DBO Approved
INSEL, PAUL A.	✓	DBO Approved	DBO Approved
JOINER, WILLIAM J	✓	DBO Approved	DBO Approved
KARIN, MICHAEL	✓	DBO Approved	Initial
LEFFERT, HYAM LERNER	✓	DBO Approved	Initial
MIYAMOTO, SHIGEKI	✓	DBO Approved	DBO Approved
MURPHY, ANNE NEVILLE	✓	DBO Approved	DBO Approved
NEWTON, ALEXANDRA C.	✓	DBO Approved	DBO Approved
PURCELL, NICOLE H	✓	DBO Approved	DBO Approved
SUNAHARA, ROGER KEN	✓	DBO Approved	DBO Approved
TAYLOR, SUSAN S.	✓	DBO Approved	DBO Approved
TREJO, JOANN	✓	DBO Approved	DBO Approved
TUKEY, ROBERT H	✓	DBO Approved	DBO Approved

Navigation: 1 2

# PSM Validation Process

- Common PSM Comments/Questions for Departments that require clarification:
  - Financial
    - PSM is unable to validate funding amount through Kualii and ORACLE
    - Funding entry is missing information (usually project number)
    - Duplication of awards
    - Listing awards for other PIs (without explanation in comments)
    - Attachments do not reflect dollar amounts entered
  - Space
    - Space was removed / decreased on one survey without corresponding change on another survey (net result is loss of department space)
    - Space was added / increased on one survey without corresponding change on another survey (net result is increase of department space or over assignment of space)

# PSM Validation Process

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QUESTIONS?

THANK YOU!

From Planning and Space Management

[prmcas@ucsd.edu](mailto:prmcas@ucsd.edu)