



Add or Change Award Credit Distribution Information

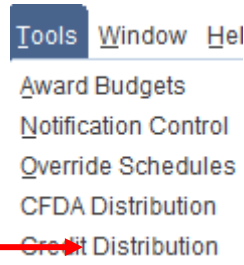
Use these instructions to add or change the credit distribution percentages on an award. This procedure is used when multiple departments share an award and credit for direct and indirect costs needs to be distributed among the departments and principal investigators based upon a specific percentage of expenditures.

Prerequisites

- You must have one of the following responsibilities to add or change award credit distribution information:
 - ORG Account Establishment Administrator
 - ORG Account Establishment Specialist with Budget Approval
 - ORG Account Establishment Specialist
 - ORG OGM Billing Specialist
- The award must already be established in the Oracle business system.

To add or change award credit distribution:

1. Navigate to **Awards > Find Award** to the **Find Award** form.
2. Enter the **Award Number**.
3. Click **Find** to open the **Award Management Folder** form.
4. Click **Open** to open the **Award Management** form.
5. On the Toolbar, click **Tools** and select **Credit Distribution** from the drop-down menu to open the **Credit Distribution** form. The **Credit Distribution** form displays the currently defined credit distribution percentages. If you are adding information for the first time the form will be blank.



| Number | Issue Date | Type | Description | Active | Billable | I | J |
|--------|-------------|-------|-------------|-------------------------------------|-------------------------------------|--------------------------|--------------------------|
| 1 | 09-DEC-2003 | Award | | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

6. Click in the **Organization** field to activate the List of Values. Select an organization from the List of Values.
7. Click in the **PI/Co-PI** field to activate the List of Values. Select a PI/Co-PI from the List of Values. Enter the Principal Investigator or Co-Principal Investigator that will receive the credit distribution on the Project/Award.
8. Click in the **Percent** field and complete or change percent of credit distribution being given.

The screenshot shows a web application window titled "CREDIT_DISTRIBUTION - ORG Account Establishment Administrator @ TRAINX - 23-APR-2019". It contains a table with the following columns: Organization, PI/CO-PI, Percent, Last Update Date, and Last Update By. The table is currently empty. A red arrow points to the Last Update Date column. Below the table, there is a "Total:" label and a "Save" button.

Note: The record will not save unless the total percent column equals 100%. You will receive an error message notifying you of the problem. Return to the **Credit Distribution** form and add the remaining percentages to ensure the column totals 100%.

9. Click **Save** to update your changes. The **Last Update Date** and **Last Update By** fields generate data automatically when the record is saved in the system.

The screenshot shows the same web application window as above, but now with data entered. The table has one row: Organization: 001 RF for SUNY, PI/CO-PI: John, Anna M., Percent: 100.00, Last Update Date: 23-APR-2019, Last Update By: 130022. The "Total:" label now shows "100". The "Save" button is highlighted.