McCormick
Northwestern Engineering
Research Administration

McCormick Direct Charging Checklist

Before Deployment in HRIS

1. Send a list of any faculty members who you plan to direct charge to Deb Cundiff in McCormick Research Administration.
2. Confirm Academic Base Salary (ABS)
3. Does the faculty member plan to recover over 75% effort? If yes, an SDA will need to be used instead of direct charging. (Only 75% of the earned rate is actually paid out each month due to 9/12 payments)
4. Does the faculty member have multiple appointments? If yes:
    - Does BA of other unit know salary is being direct charged?
    - Has sponsored funding been applied to appropriate appointment?
    - Complete the "effort allocation for multiple appointments" spreadsheet and use the calculated funding % to populate the salary planning spreadsheet.
5. Confirm figures on salary plan spreadsheet, taking into account how final distribution will look on the effort report.
    - When deploying faculty salary in HRIS it is important to enter the % salary charged to sponsored projects based on the 1/9 earned rate (not the 1/12 pay rate).
    - Over the NIH cap? (If yes, confirm calculations are correct)
6. Does the sponsored account have sufficient funds to cover the expense (including fringe benefits and F & A)?
7. Confirm project dates
    - Does the project begin or end during the salary recovery period?

Follow-up

1. Confirm salary distribution is correct in HRIS
2. Confirm effort report is correct
    - Do effort percentages match plan?
    - Confirm over the cap cost sharing if applicable
3. Review spreadsheet throughout the year (*at least* once every 2 months) to add new sponsored projects, remove projects that have ended, etc.