

UNIVERSITY
OF MIAMI



Financial Classification Codes

A Guide to Locating Financial Class Codes in DMAS to
Identify Functions of Rooms in USpace

Developed by: The Office of Space Management and Analysis

April 21, 2016

USpace – Room Functions


The Office of Space Management and Analysis has prepared this documentation to assist USpace representatives in locating Financial Classification Codes in DMAS. These codes serve as a guide to appropriately allocate room functions in USpace.

Please familiarize yourself with the University's [Function Codes & Definitions](#) and [Room Function Coding Instructions](#) prior to reviewing the information contained in this presentation. Units identified as research intensive or having research intensive divisions within it should also refer to the [Room Type Matrix for Full Functionalization](#) document.

Any function inquiries should be directed to the [Office of Research Administration](#).



DMAS Sign On Screen

| | | | | |
|--|----------|---------------|------|---------|
|  | | Signon | | |
| Search | Calendar | Directory | News | UM Home |

Please be advised that PIDMS and TIDMS are reserved on Sundays for maintenance. If you find you will need to use PIDMS or TIDMS on a Sunday please call Production Control at (305) 284-4682 no later than Thursday.

Enter your IDMS User ID and Keyword.

| | |
|----------|---------------------------------------|
| User ID: | <input type="text"/> |
| Keyword: | <input type="text"/> |
| | <input type="button" value="Signon"/> |

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Log In issues - Call IT Support Center at 305-284-6565, option 5

Unable to view document images/PC issues at Gables/RSMAS campus - email [IT Support](#)

Unable to view Sponsored Programs proposal images - email the Director of Sponsored Programs, [Maria V. Ortiz](#)

All other HELP for Central Server Depts. - e-mail [DMAS Support](#)

Note: Law School and Enrollment have their own Help Desk

Account access issues - Call Controller's Office at 305-284-5912

Unable to view document images/PC issues at Medical campus - email [Med IT](#)


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DMAS Main Menu

This is the menu screen you will see after successfully logging in to DMAS. Click on the Accounts option.

| | | | | |
|---|----------------------------|---------------------------|----------------------|-------------------------|
|  | | DMAS Main Menu | | |
| Search | Calendar | Directory | News | UM Home |
| Accounts | Sponsored Awards | | | |
| Departments | Responsible Person | | | |
| Purchasing | IDR | | | |
| Report Distribution | Controller's Office | | | |
| Soft Encumbrances | FRS Bulletin Board | | | |
| Electronic Signatures | Sponsored Billing | | | |
| Alternative Funding | Accounts Payable | | | |
| eCheck | | | | |
| Change Password | Logoff | | | |

[Account Menu](#) | [Sponsored Award Menu](#) | [Sponsored Billing Menu](#) | [Department Menu](#) | [Responsible Person Menu](#) | [IDR Menu](#) | [Purchasing Menu](#) | [Soft Encumbrance Menu](#) | [Electronic Signatures](#) | [Accounts Payable](#) | [eCheck Menu](#) | [Alternative Funding Menu](#) | [Main Menu](#) | [Logoff](#) |

VLKE30

Your Department: 43001-20

Thursday, 8/15/2013 2:30:49 PM

Log in issues - Call IT Support Center at 305-284-6565, option 5
Unable to view document images/PC issues at Gables/RSMAS campus - email IT Support
Unable to view Sponsored Programs proposal images - email the

Account access issues - Call Controller's Office at 305-284-5912
Unable to view document images/PC issues at Medical campus - email Med IT
Access and information contained within are protected by



Reports by Account Number

| | | | | | | | | | | | |
|--|---|-----------------|------------------|-------------------|---------------------------|-------------------------------|-------------------------------------|---|--|---|------------------------|
| <p>1. Enter Account Number: <input type="text"/></p> <p>and Fiscal Year: <input type="text" value="2016"/></p> | <p>2. Click on report desired:</p> <table border="1" style="width: 100%; text-align: center;"> <tr><td>Account Summary</td></tr> <tr><td>Open Commitments</td></tr> <tr><td>Soft Encumbrances</td></tr> <tr style="border: 2px solid red;"><td>Account Attributes</td></tr> <tr><td>Account Transactions by Month</td></tr> <tr><td>Revenues & Expense Summary (1 line)</td></tr> <tr><td>Revenues & Expense Summary (Categories)</td></tr> <tr><td>Sponsored Accounts Summarized by Sponsored Budget Categories</td></tr> <tr><td>Revenues & Expense Summary (Med School Aggregation)</td></tr> <tr><td>Sponsored Award Images</td></tr> </table> | Account Summary | Open Commitments | Soft Encumbrances | Account Attributes | Account Transactions by Month | Revenues & Expense Summary (1 line) | Revenues & Expense Summary (Categories) | Sponsored Accounts Summarized by Sponsored Budget Categories | Revenues & Expense Summary (Med School Aggregation) | Sponsored Award Images |
| Account Summary | | | | | | | | | | | |
| Open Commitments | | | | | | | | | | | |
| Soft Encumbrances | | | | | | | | | | | |
| Account Attributes | | | | | | | | | | | |
| Account Transactions by Month | | | | | | | | | | | |
| Revenues & Expense Summary (1 line) | | | | | | | | | | | |
| Revenues & Expense Summary (Categories) | | | | | | | | | | | |
| Sponsored Accounts Summarized by Sponsored Budget Categories | | | | | | | | | | | |
| Revenues & Expense Summary (Med School Aggregation) | | | | | | | | | | | |
| Sponsored Award Images | | | | | | | | | | | |

Reports by Account/SubObject:

| | | |
|--|---|-----------------------|
| <p>1. Enter Account Number: <input type="text"/></p> <p>Sub-Object: <input type="text"/></p> <p>and Fiscal Year: <input type="text" value="2016"/></p> | <p>2. Click on report desired:</p> <table border="1" style="width: 100%; text-align: center;"> <tr><td>Account Detail</td></tr> </table> | Account Detail |
| Account Detail | | |

Account Menu

This is the menu screen you will see next when you select Accounts from the DMAS Main Menu. Enter the account number, Fiscal Year, and select Account Attributes from the box on the right.



Account Attributes for 660XXX (FY 2016)

1U01AI103397: NIAID 1 U01 AI103397-01

MIAMI WOMEN'S INTERAGENCY HIV STUDY (MIAMI WIHS)

| | | | | | | | |
|------|------|------|------|------|------|------|------|
| 1995 | 1996 | 1997 | 1998 | 1999 | 2000 | 2001 | 2002 |
| 2003 | 2004 | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 |
| 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | | |

| | | | | | | | |
|---|--|--|--|--|--|--|--|
| Master Account(s) within Award 1U01AI103397 | | | | | | | |
| 660338 662346 664154 666133 | | | | | | | |
| Sub Account(s) within Award 1U01AI103397 | | | | | | | |
| 660373 660374 660375 660376 662347 662348 662349 662350 664155 664156 664157 664159 666134 666136 | | | | | | | |

| Account Attributes | Award Attributes | Award Year Attributes | IDC Rates |
 | Incremental Funding | Award Increase/Decrease | Sponsor Attributes | Proposal Attributes |

Account Attributes

| | | | |
|----------------------------------|--------------------|---|--|
| Associated GL Account | Responsible Person | Account Start Date | Account End Date |
| 030338 | Jane Doe | 01/01/2013 | 12/31/2013 |
| Delete Flag | Frozen Flag | Prefix | Suffix |
| 0 | 1 | H | R |
| Campus Code | | Department / Sub-Department | |
| 10 | | 31014-44: MEDICINE - INFECTIOUS DISEASES | |
| Fund Group | Sub Fund Code | Major Source of Funds - Minor Source of Funds | Financial Class I - Financial Class II |
| 30 | 10 | 70-1 | 50 - 20 |
| NCHEMS | Income Type | User Attribute Code | Net Asset Type |
| 2.1 -Institute/Research Centers | | | U |
| Unicost | AAMC Rclass | Tax Code | Year End Code |
| R | | P | P |
| Federal Flag | Project Year | Master Account Indicator | IDC Rate |
| Y | 01 | MT | 53.00 |
| Bill Account Flag | Letter of Credit | Create Date | |
| N | H | 01/29/2013 | |
| Last Update: 08/11/2015 (FBD010) | | | |

Account Attributes

Example 1: Organized Research

The Financial Class is what determines the type of award for the purposes of USpace. By clicking on the Financial Class I – Financial Class II label a box will appear that defines what each pairing is.



Account Attributes for 668XXX (FY 2016)

A010: GENECURE BIOTECHNOLOGIES PROT# A010

PROTOCOL A010: A PHASE I, DOSE-ESCALATION CLINICAL TRIAL TO

| | | | | | | | |
|------|------|------|------|------|------|------|------|
| 1995 | 1996 | 1997 | 1998 | 1999 | 2000 | 2001 | 2002 |
| 2003 | 2004 | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 |
| 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | | |

[Account Attributes](#) |
 [Award Attributes](#) |
 [Award Year Attributes](#) |
 [IDC Rates](#) |
 [Incremental Funding](#) |
 [Award Increase/Decrease](#) |
 [Sponsor Attributes](#) |
 [Proposal Attributes](#)

Account Attributes

| Associated GL Account | Responsible Person | Account Start Date | Account End Date |
|------------------------------------|--------------------|---|--|
| 03861C | Jane Doe | 07/01/2011 | 05/04/2016 |
| Delete Flag | Frozen Flag | Prefix | Suffix |
| 0 | 0 | Y | R |
| Campus Code | | Department / Sub-Department | |
| 10 | | 31014-44: MEDICINE - INFECTIOUS DISEASES | |
| Fund Group | Sub Fund Code | Major Source of Funds - Minor Source of Funds | Financial Class I - Financial Class II |
| 30 | 30 | 30-512 | 50 - 21 |
| NCHEMS | Income Type | User Attribute Code | Net Asset Type |
| 2.1 -Institute/Research Centers | | | U |
| Unicost | AAMC Rclass | Tax Code | Year End Code |
| DS | | P | P |
| Federal Flag | Project Year | Master Account Indicator | IDC Rate |
| N | 01 | MT | 29.00 |
| Bill Account Flag | Letter of Credit | Create Date | |
| N | YCB | 09/13/2011 | |
| Last Update: 03/03/2016 (SPM49P01) | | | |

Account Attributes

Example 2: Other Sponsored Activities / Clinical Trials (OSA)

The Financial Class is what determines the type of award for the purposes of USpace. By clicking on the Financial Class I – Financial Class II label a box will appear that defines what each pairing is.

