**Dates & Percentages:** Start/End dates and Org/Function Percentage Proration

07/06/2015 v3 jcc

Cautions:

Do not end date org presences, function codes, or occupants with the same date as the start date.

Do not make org or function percentages 0%.

On the first day of a new fiscal year:

A new org takes over the space:

1. Change the org, assign the new org start date as 7/1/xx
2. Set function code start dates to 7/1/xx
3. Check the Occupancy/Research – end date occupants and delete sponsored and labor distribution accounts appropriately

Reminder: If you’re changing the org to be one outside of your privileges you must make sure you do all of the steps before saving changes, because after save changes you will not be able to make corrections.

ANY other time during the fiscal year: Scenarios for end dating

1. Org moves out, and room is vacant: (no new occupant org for the room has been identified)
   1. Leave the org dates and percentage as is
   2. End date the function codes with the date that the org moved out
   3. End date the occupancy portion of your organized research
   4. Add function code 8.1 Capable of use, set the start date to ONE DAY AFTER the move out date

Reminder: the room will STAY on your list until a new org has been identified

1. Org moves out and new org moves in:
2. End date Occupancy/Research – end date occupants
3. End date the org with the same date
4. End the function codes with the same date
5. Add the new org
6. Set the new org start date to be the NEXT day after the end date on the original org
7. Set the org percentage to be 100%
8. Set the exiting org presence to Freeze
9. Multiple orgs share a room:

3A Concurrent use: More than one org in a room at the same time*, the entire fiscal year*

* + 1. Org A = 25%, Org B = 75%, the start dates (org and function) are the same

3B New sharing: An org moves in with an existing org part way through the fiscal year

Org A occupies 100% of the room at the beginning of the fiscal year.

Org B moves in to share the room with Org A at “XX” date during the fiscal year

1. End date Org A - Occupancy/Research – end date occupants
2. End date Org A – with the matching date
3. End date Org A function codes - with the matching date
4. Add Org B with the move in start date
5. Add Org B percentage with the appropriate split
6. Re-add Org A with the move in start date
7. Add Org A percentage to compliment the split with Org B
8. Add Org A function codes with the move in start date