

External Sales and Services of Education Related

Activities Review and Approval Steps

- Departmental Business Officer and Control Point (Dean's or Vice Chancellor's Office) review and approval
- [Government and Business Contracts Unit of the Office of Sponsored Research](#) review and draft agreement(s) with external users
- Department submits a completed External Sales and Services of Education Related Activity Request ([Business Contract Request Form](#) and a [Rate Calculation Sheet](#)) to [B&RM, Recharge Operations](#), including the following:
 - Documented approval from Departmental Business Officer and Control Point
 - Purpose of work
 - Relation between proposed service and UCSF's mission
 - List of external clients
 - Proposed rate methodology and calculation
 - Cost estimate
 - Units of service (e.g., per test, per labor hours, per machine hours, etc.)
 - Proposed rate methodology narrative
 - Rate calculation, including 26% F&A rate (Service Center Rate)
 - Revenue calculation
 - Dept ID
- B&RM, Recharge Operations reviews and approves the request and sets up a new Project ID with F&A Base Code L
- [Government and Business Contracts Unit of the Office of Sponsored Research](#) executes agreement(s) with external users
- Department contacts the Controller's Office to determine Unrelated Business Income Tax (UBIT)
- Revenue collected from external customers should be deposited into external revenue account 42105 and the indirect cost component of the revenue will be assessed automatically