

Academic Space Survey Essentials

What information do we collect and why?

Room Details Tab

Room Details

Annual Survey

Confirmation

Building

CIRC

Room

016

View

Space Use

250 LABORATORY RSCH LAB RESEARCH LAB

Building, room, and room type. Click the View button to see the floor plan.

View only of all orgs in the space

Organizations Using this Space

☐	Org #	Org Name	Room Percent
☐	310000000	SCHOOL OF MEDICINE DEAN'S OFFICE	100

Department Correct?

Yes

Space Use Correct?

Yes

Room Dimensions Changed?

Station Count

0

Space Status

2 - ASSIGNABLE

Animal Space

☐

Confirm or Update Org and Use

Room Details Tab

Station Count	0
Space Status	2 - ASSIGNABLE
Animal Space	☐

Station count should be filled out for all clinical research offices, class laboratories, classrooms, faculty offices, office service, offices, hoteling offices, research labs, and seminar rooms.

Space status indicates whether a room is currently in use, suitable for a recruit or not in working condition. **All Heersink School of Medicine users should complete this field for all spaces.**

- 1 – Active – Space that has been assigned to an individual or groups of individuals. The space is actively providing a service or program.
- 2 – Assignable - Space being retained by a department or given back to the Institution and is ready to be assigned to either a recruit, individual, or program. This space is broom cleaned; utilities are in working order. Occupational Health & Safety has cleared any hazards and is move-in ready.
- 3 – Inactive - Space that is being retained by an organization and is in transition. It does not have occupants and may require hazard removal, infrastructure upgrades, or clean-up. Space under renovation or in a shelled condition would be included.
- 4 – Unassignable – This space is not assignable due to infrastructure issues. The Dean's Office can retain the space for future development or give it back to the Enterprise.

Annual Survey Tab – Functional Category Codes to Rooms

What is “function” and why do we collect this information?

Functions describe the activities that occurred in the room during the fiscal year as defined by Uniform Guidance. Functions for any room that is not a joint use room should be determined by using the salaries and wages of the occupants. This concept is called “matching the space with the base” which answers the question “what are the occupants doing in this space and how are those activities funded?” **This information is used to compile the F&A (Indirect) Cost Proposal.** Functions determine how much in depreciation of buildings & equipment, operation & maintenance, and interest costs can be claimed in the F&A calculation.

Functional Category Codes to Rooms									
AddDeleteEdit Multiple									
☐		Building Code	Room Number	Organization	Organization Name	Function Code	Function Name	Function Room Percent	Total Percent
☐	Edit	BBRB	809A	310000000	SCHOOL OF MEDICINE DEAN'S OFFICE	INST	INSTRUCTION	10	100
☐	Edit	BBRB	809A	310000000	SCHOOL OF MEDICINE DEAN'S OFFICE	OR	SPONSORED RESEARCH	90	100

Function – F&A Proposal Structure

- F&A Costs are allocated based on the **function** portion of the Space Survey
- For example, if the total building function of McCallum Building is 50% Sponsored Research, then 50% of the F&A costs associated with the building, equipment, operations & maintenance, and interest expense are included in the F&A calculation for Sponsored Research.
- The higher the Organized/Sponsored Research square footage, the more costs eligible for F&A recovery.



Annual Survey Tab – Functional Category Codes to Rooms

Common Mistakes

Not updating the previous year's function or not entering a function at all.

Not using salaries & wages of the occupants to determine function.

Not accounting for each occupants' time spent in the room. Some occupants may be in the room infrequently.

Not understanding the different types of funding e.g., non-sponsored funding vs. sponsored funding.

Annual Survey Tab – Functional Category Codes to Rooms

What happens if the function is incorrect?

If function information is incorrect or the space does not match the base, the University could be impacted through...

Under recovery of costs – undercounting organized/sponsored research space means losing out on depreciation, operations & maintenance, and interest cost recovery the University is owed for conducting organized research.

Rate reductions – Negotiating agencies can reject improper functional distributions, leading to a lowered overall F&A negotiated rate.

Annual Survey Tab – PIs to Rooms

Why do we collect this information?

Entering the PI or PIs into the survey determines the Space Utilization square footage for your faculty.

Items of note:

- PI and Occupant are different
- A PI may have a lab or group of labs where their grants are being worked on but may not be in the room frequently due to other assignments. Enter them in the PI field.
- If the PI is in the room on a regular basis, you may also list them as an Occupant.

PIs to Rooms

AddDeleteEdit Multiple

☐	Employee ID	Last Name	First Name	Building Code	Room ID	PI Room Percent
☐	EditAAAAAAAAA	Administrator	Joe Q.	BBRB	809A	100

Annual Survey Tab – Pls to Rooms

Common Mistakes

- Not updating or validating both the PI listed in the space AND their corresponding room percentage.
- Not vacating PIs no longer in the space.
- Not making sure the PI percentages add up to 100% for *your department only*.
- Not entering all the same functions, accounts, and occupants for a PI's group of rooms.
- Deleting another organization's PI information in shared rooms.
- Over or under allocating the PI's room percentage. PI room percentage is multiplied by Organization Assigned Area to derive the PI's room square footage.

What happens if the PI information is incorrect?

Space utilization will also be incorrect.

Rooms may be grouped incorrectly making the Quality Assurance Review difficult.

Annual Survey Tab – Occupants

Why do we collect this information?

- 1. Validation of the room function or claims of organized/sponsored research. The accounts from which the occupants are paid should reflect the activities or functions of the room. For research lab and lab service rooms make sure to capture all occupants that used the space or spaces between October 1, 2025 –September 30, 2026.
- 2. Space management – the Dean’s Office and/or facilities management team uses this information to locate individuals. This information is critical for items like emergencies, security, building issues, department-specific issues, or equipment issues. Office occupants should be the most current individuals.

Occupants

AddDelete

☐	Last Name	First Name	Employee Organization	Bldg	Room #
☐	EditAardvark	Aaron	11111111A	BBRB	809A
☐	EditAdministrator	Joe Q.		BBRB	809A

Annual Survey Tab – Occupants

Common Mistakes

Not updating or validating the occupants listed in the room.

Not removing previous occupants who no longer use the room or rooms.

Not listing ALL occupants.

Deleting occupants of organizations sharing the space.

Annual Survey Tab – Occupants

What happens if the occupants are incorrect?

Validating information is incomplete– If occupant information is incomplete the F&A rate could be incorrect. If negotiators are unable to verify the information in the room, they may reject the room functions and the F&A rate could be lowered causing lower cost recovery for the University.

Space Management– Inaccurate records could impact operations or emergency events.

Annual Survey Tab – Accounts

Why do we collect this information?

Validation of the room function or claims of organized/sponsored research. The accounts from which the occupants are paid should reflect the activities or functions of the room. These are the General Ledger Accounts or the Grants Accounting Award numbers.

Accounts to Rooms

AddDelete

☐	Account Number	Account Description	Building Code	Room Number
☐	Edit1234567	SPACE SURVEY TEST ACCOUNT	BBRB	809A

Annual Survey Tab – Accounts

Common Mistakes

- Not listing all accounts that fund work in the room.
- Not listing any accounts in research labs.
- Not updating or validating accounts already listed.
- Not deleting accounts no longer funding work in the room.
- Listing accounts that do not fund work in the room. If a person is paid from a funding source for work done outside the room you are surveying, please do not list it.

What happens if the accounts information is not accurate?

Validating information is incomplete— If account information is incomplete the F&A rate could be incorrect. If negotiators are unable to verify the information in the room, they may reject the room functions and the F&A rate could be lowered causing lower cost recovery for the University.

Confirmation Tab

Room Details

Annual Survey

Confirmation

Notes

Type any important information about the space you need us to know here.

Complete?

☒

* Required Field

Always save your changes!

Save Changes

Cancel

Make sure this box is checked when you are finished

Always save your changes!

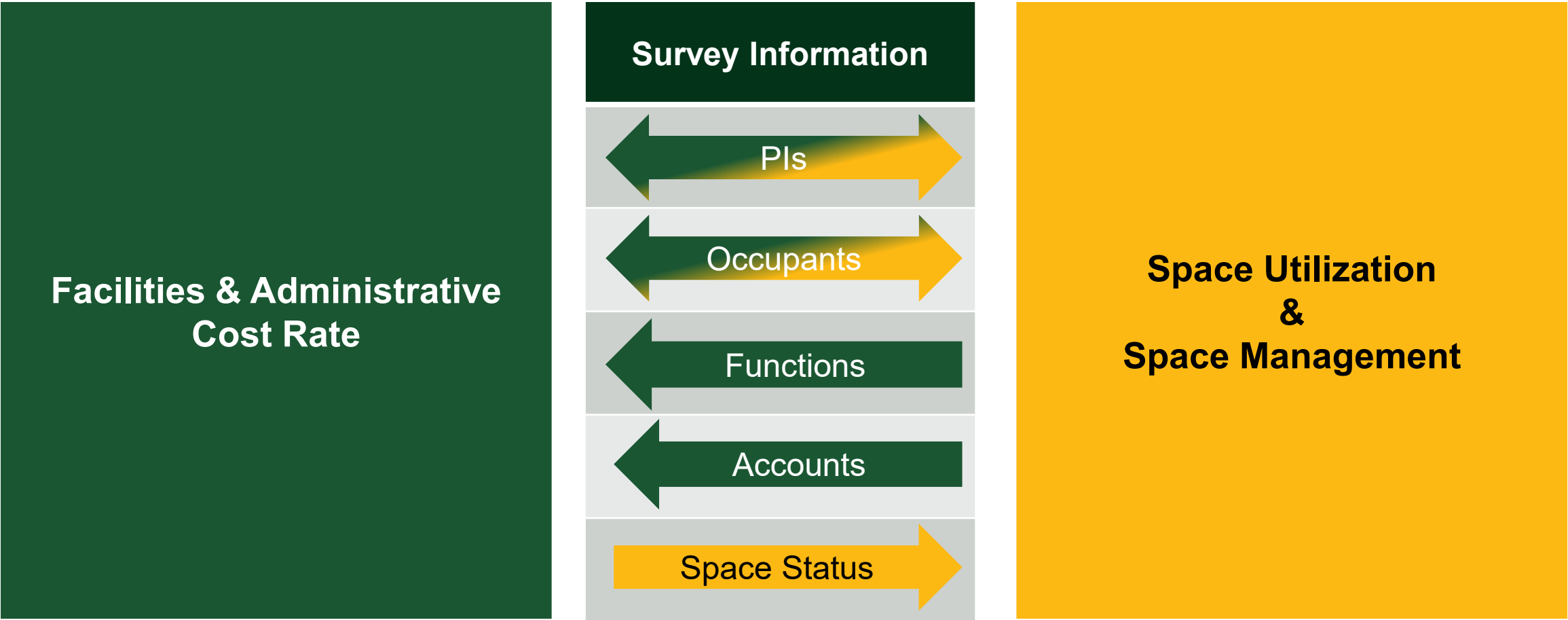


Most Common Survey Mistake

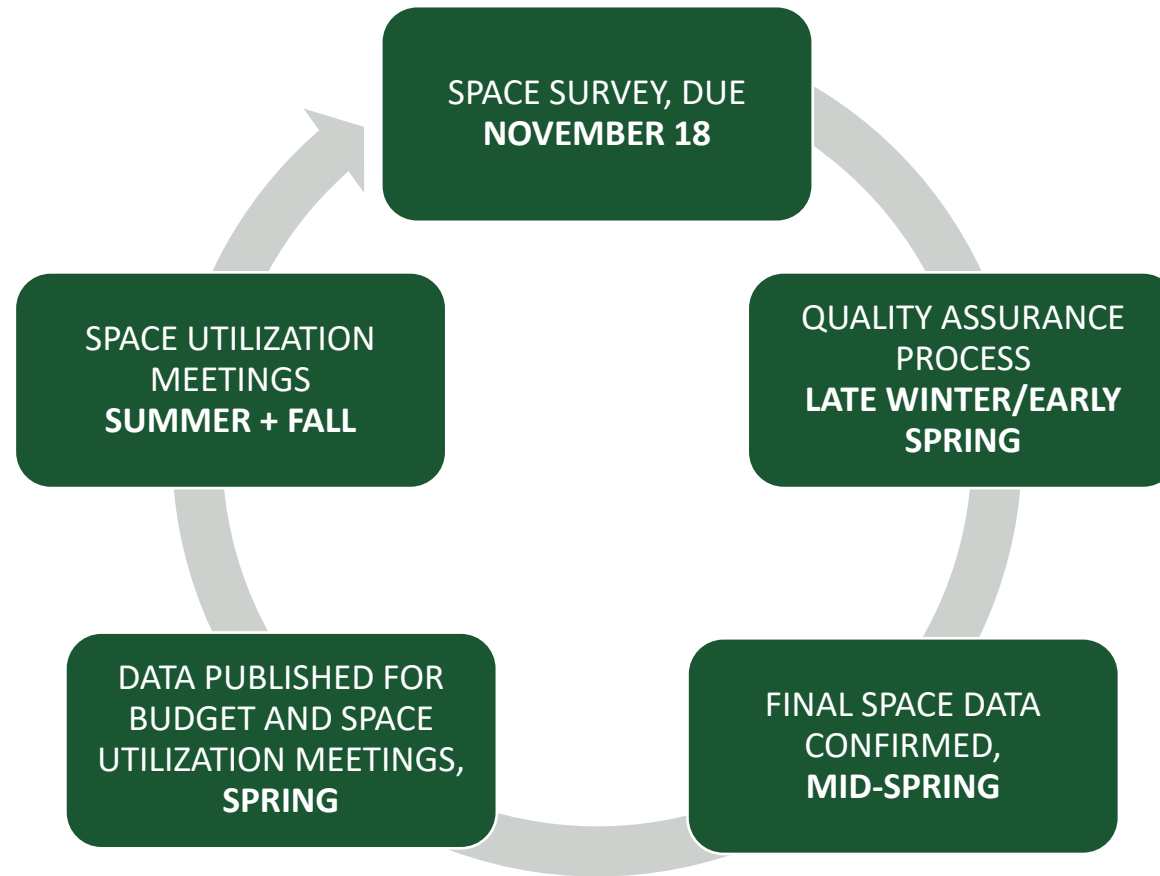
Waiting until the last minute or only giving yourself a few days to work on it. For the survey to be correct, there is a good bit of information gathering and data entry to be done. The survey is open for editing for 9 weeks or longer. Please use your time wisely!

Summary – Your Effort Completing the Space Survey

Impacts UAB Resources



Summary – Space Data Year at a Glance



Survey Resources

- **NEW!** Survey Reference Guide: [Click Here](#)
- Function Definitions: <https://www.uab.edu/financialaffairs/training/departamental-space-function-code-summary>
- Room Use Definitions: <https://www.uab.edu/financialaffairs/training/space-room-use-summary>
- Space Status Definitions: <https://www.uab.edu/financialaffairs/training/space-status-definitions>
- Videos and Other Resources: <https://www.uab.edu/financialaffairs/accounting/space>

Deadline: November 18, 2026