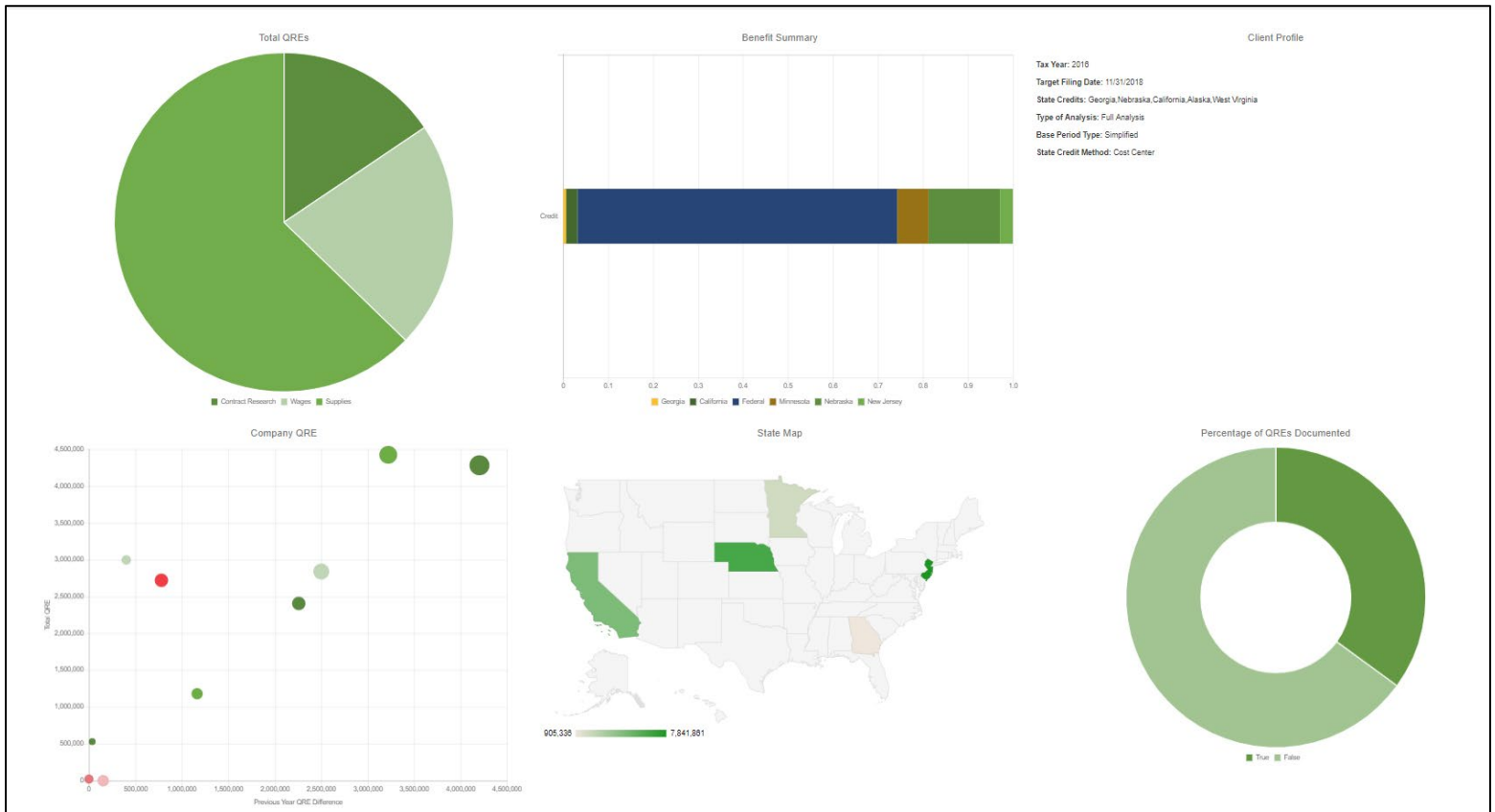


## Introduction to RCM: Dashboard

Research Credit Module (RCM) is a way for CFO Services to organize, calculate and display the Research and Development Tax Credit (R&D) for providing full service consulting and more importantly for clients in-house calculation. RCM organizes the data received from clients into multiple lists within SharePoint. A back-end database is used to help run the credit calculation. RCM can be used by the client during the whole process of the project, so they can easily see how the project is moving along. All data seen on RCM can be viewed and edited, as well as exported to Excel.

Below is a picture of the dashboard from the home page of the RCM tool.



The RCM Dashboard shows the most important information of the calculated R&D at a glance:

- **Total QREs (Qualified Research Expenses):** QRE split out of Wages, Supplies and Contract Research.
- **Benefit Summary:** Federal credit amount, and each states credits, and even LBI Directive, if applicable.
- **Client Profile:** This section gives important details about the company and the current project, like the target filing date and base period type.
- **Company QRE:** QRE Differences from the previous year by company. Very useful for multi-company clients.
- **State Map:** This map shows the QREs in each state. Hover over one of the states and you can see the QREs for that state. Also a colored legend at the bottom to show where that state is at on the QRE spectrum.
- **Percentage of QREs Documented:** Percentage of projects that are documented for qualitative purposes.