

Princeton ERA: Cost Sharing

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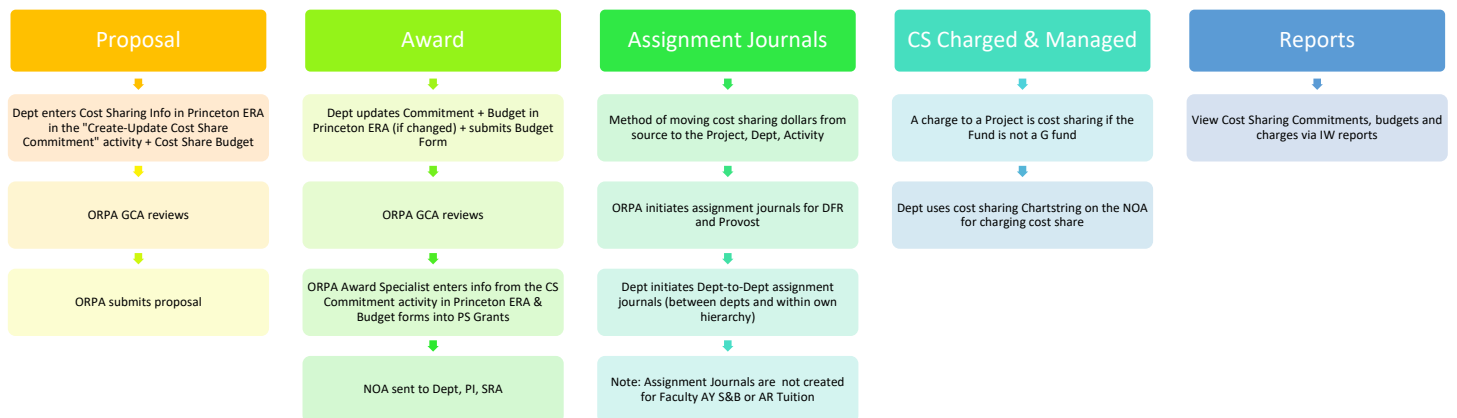
Princeton > Research
Electronic Research Administration

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1 Cost Sharing Overview



2 Proposal Stage

At the proposal stage, the department does the following:

For personnel cost sharing: On the Princeton ERA proposal Budget "Personnel Costs" Smart Form, enters a value for the number of "Sal Req" months that is less than the value for the number of "Effort" months.

For non-personnel cost sharing, enters the cost sharing costs on the "General Cost Definition" and "General Costs" screen on the Cost Sharing Budget.

Note: If F&A is not allowed on Cost Share expenses, on the Cost Sharing Budget's "General Budget Information" SmartForm Question 3 "Does this budget use the standard F&A cost base and rates?" , select No and enter in 0 for all periods in the new table that appears for F&A rates.

Distributes the cost sharing in the Princeton ERA Create-Update Cost Share Commitments screen by Fiscal Year, Amount, Fund, Type and Source Dept for the cost sharing (see chart at the end of this document for guidance on depts)

2.1 Proposal Stage Princeton ERA Screenshots: Cost Share Budget

This section details how to enter your Cost Share Budget in Princeton ERA.

2.1.1 Creating the Cost Share Budget

1. From the sponsor budget listed in the Workspace in Princeton ERA, click on the Create Cost Share button.

Grants Preview

Princeton > Research
Electronic Research Administration

Hello, Stacey Weber ▾
Switch User

Dashboard | Agreements | Grants | Funding Proposal | Complex Projects | Awards | Reports | Help Center

Grants > Kyle CS Demo Proposal 12/15 > The XYZ Foundation Help

Draft

The XYZ Foundation BU00006134 **Project Budget**

Next Steps

- Edit Budget
- Printer Version
- Create Subaward
- Create Cost Share**

Sponsor: The XYZ Foundation **Grand Total:** \$0

PI: Martha Gibbs (testpi9) **Budget Type:** Foundation/Not For Profit

Funding Proposal: Kyle CS Demo Proposal 12/15 **Subaward Count:** 0

Financials | Subawards | Documents | Snapshots | History

Current All-Period Totals	Period 1	Period 2	Period 3	Cumulative

2.1.2 Cost Share Information SmartForm

1. Field 1: Cost Share Type:
 - a. Select the cost share type of either Mandatory, or Voluntary Committed.
 - b. Mandatory should be selected only if the Sponsor explicitly states that Cost Share is required.
 - c. All other cost share (even if strongly suggested/recommended by the Sponsor) should be designated as Voluntary Committed, which requires an Ancillary Review to be routed to the ORPA directory for approval.
 - d. Third Party In Kind should not be selected, as it is included in either Mandatory or Voluntary Committed.
2. Field 2: Cost Share Entity: Choose the Proposal Submitting Department

Creating New: Budget

Cost Share Information

1. Cost share type:

- Mandatory
 - Voluntary Committed
 - Third Party In Kind
- [Clear](#)

2. Cost share entity:

MOL-Research/Teaching ... ✕

2.1.3 General Budget Information SmartForm

1. **Q1: Budget title:** Update the budget title if desired
2. **Q2: Principal Investigator for this budget:** The Principal Investigator for the cost share budget matches the PI of the project budget
3. **Q3: Does this budget use the standard F&A cost base and rates:** Choose whether or not the standard F&A rate and base should apply to this Cost Share budget (the answer is yes only if the sponsor allows F&A on cost shared items to apply to the University's cost share commitment).
 - If no is selected, then fill out the F&A rate and base that should be used in the Non-Standard F&A cost base. Since FA on cost share is not allowed, enter 0% in the rates section and select appropriate base (MTDC or TDC) .)
4. **Q4: Include in consolidated budgets:** Always leave this field as no for Cost Share budgets.
5. **Q5: Enter inflation rates:** Choose the inflation rate to apply to the future periods. If you want inflation to be applied to your first budget period, check off the Inflate Period 1 checkbox.

Validate Compare

General Budget Information

Go to forms menu Print Help

General Budget Information

Cost Share Information

General Budget Information

Financials

Personnel Costs - Cost Share

General Cost Definition

General Costs

F&A Cost Overrides

Attachments

Attachments

1. * Budget title: ?

Cost Sharing for The XYZ Foundation

2. * Principal Investigator for this budget:

Martha Gibbs (testpi9) ▼

3. * Does this budget use the standard F&A cost base and rates? ?

Yes No [Clear](#)

Standard F&A cost base and rates

	Period	1	2	3
F&A Cost Base	Start:	7/1/2024	7/1/2025	7/1/2026
	End:	6/30/2025	6/30/2026	6/30/2027
MTDC	Rate:	64%	64%	64%

Non-standard F&A cost base and rates

	Period	1	2	3	
F&A Cost Base	Start:	7/1/2024	7/1/2025	7/1/2026	
	End:	6/30/2025	6/30/2026	6/30/2027	
MTDC ▼	Rate:	<input type="text" value="0%"/>	<input type="text" value="0%"/>	<input type="text" value="0%"/>	<input type="button" value="Clear"/>

4. Include in consolidated budgets? ?

Yes No [Clear](#)

5. Enter inflation rates:

Inflation Rate Inflate Period 1

General Cost: %

2.1.4 Personnel Costs – Cost Share SmartForm

- Cost sharing for personnel items is not created in the Cost Share Budget SmartForm.
- Cost share is created on the FP budget when the value for "sal req" months is less than the value for "effort" months. The cost for "effort" minus "sal req" is displayed as cost sharing in the cost share budget screen.
- If the cost share for personnel items needs to be updated, return to the FP budget and update the values for "sal req" and "effort".

Personnel Costs

<p>This is the Main FP Budget screen. Sal Req months is less than Effort months.</p> <p>Person: Martha Gibbs (testpi9) Role: PD/PI</p>	Period: Period 1 Start: 7/1/2024 End: 6/30/2025 Duration: 12.00	Period 2 7/1/2025 6/30/2026 12.00	Period 3 7/1/2026 6/30/2027 12.00
	SM Effort Mos.: <input type="text" value="1"/>	<input type="text" value="1"/>	<input type="text" value="1"/>
	SM Sal Req Mos.: <input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
	AY Effort Mos.: <input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
	AY Sal Req Mos.: <input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
	FB Rate: <input type="text" value="37.3"/> %	<input type="text" value="37.3"/> %	<input type="text" value="37.3"/> %
	Annualized Sal.: \$120,000.00 Monthly Rate: \$10,000.00	\$124,800.00 \$10,400.00	\$129,792.00 \$10,816.00
	Salary Cost Total: Benefits Cost Total: Personnel Cost Total:	\$0.00 \$0.00 \$0.00	\$0.00 \$0.00 \$0.00

Personnel Costs

<p>This is the "Show Effort" view of the main FP Budget screen. The % is the % of the number of months in the budget period.</p>	Period: Period 1 Start: 7/1/2024 End: 6/30/2025 Duration: 12.00	Period 2 7/1/2025 6/30/2026 12.00	Period 3 7/1/2026 6/30/2027 12.00	
	SM Effort Mos.: 1	1	1	
	SM Sal Req Mos.: 0	0	0	
	AY Effort Mos.: 0	0	0	
	AY Sal Req Mos.: 0	0	0	
	Effort%: 8.3333%	8.3333%	8.3333%	
	Sal Req%: 0%	0%	0%	
	FB Rate: 37.3%	37.3%	37.3%	
	Annualized Sal.: \$120,000.00 Monthly Rate: \$10,000.00	\$124,800.00 \$10,400.00	\$129,792.00 \$10,816.00	
	Salary Cost Total: Benefits Cost Total: Personnel Cost Total:	\$0.00 \$0.00 \$0.00	\$0.00 \$0.00 \$0.00	\$0.00 \$0.00 \$0.00

This is the Cost Share (CS) Personnel screen. It is not editable. It displays the cost and cost share as % of the number of months in the budget period. It does not display person months even if budgeting by months was used in the main budget. If CS values for personnel need to be changed, change them on the main budget.

Personnel Costs

<input type="button" value="Save"/>	Period: Period 1 Start: 7/1/2024 End: 6/30/2025 Duration: 12.00	Period 2 7/1/2025 6/30/2026 12.00	Period 3 7/1/2026 6/30/2027 12.00
Person: Martha Gibbs (testpi9) Role: PD/PI	CS Req: 8.3333% Annualized Sal.: \$120,000.00 Salary: \$10,000.00 Benefits: \$3,730.00 Total: \$13,730.00	8.3333% \$124,800.00 \$10,400.00 \$3,879.00 \$14,279.00	8.3333% \$129,792.00 \$10,816.00 \$4,034.00 \$14,850.00
Salary Cost Total: Benefits Cost Total: Personnel Cost Total:	\$10,000.00 \$3,730.00 \$13,730.00	\$10,400.00 \$3,879.00 \$14,279.00	\$10,816.00 \$4,034.00 \$14,850.00

2.1.5 General Costs Definition SmartForm

Follow the same steps you would follow for entering in a Sponsor Budget.

If there is subrecipient cost share, add the item "Other" in the Cost Share budget, enter the subrecipient's name in the description box, and enter the amount. There is no way to enter the subrecipient cost share in the Subaward Budget SmartForm.

2.1.6 General Costs SmartForm

Follow the same steps you would follow for entering in a Sponsor Budget.

2.1.7 F&A Override SmartForm

There is nothing to complete on this page.

2.1.8 Attachments SmartForm

Drag and drop or click the Add button and upload the Cost Share Budget form here.

You Are Here: Kyle CS Demo Proposal 12/15 > Cost Sharing for The XYZ Found...

Editing: BU00006135 [Go to forms menu](#) Print Help

Attachments:

1. Attachments:

+ Add

Name
cost-sharing-budget.pdf(0.01) ...

2.1.9 Reviewing the Cost Share Budget

1. On the Funding Proposal page, click on the name of the cost share budget in the Working Budgets section to display a summary of the cost share budget.

Grants > Kyle CS Demo Proposal 12/15 ? Help

Draft

Kyle CS Demo Proposal 12/15

FP00004258

Funding Proposal

Next Steps

Edit Funding Proposal

Printer Version

- [Submit For Department Review](#)
- [Withdraw Proposal](#)
- [Manage Ancillary Reviews](#)
- [Manage Relationships](#)
- [Manage Tags](#)
- [Create Agreement](#)
- [Add Attachments](#)
- [Copy](#)
- [Create Additional Budget](#)
- [Export Budget](#)
- [Send Email](#)
- [Manage Access](#)
- [Add Comment](#)
- [Display Team COI Information](#)

Proposal Information

PD/PI:	Martha Gibbs (testpi9)	Budget Information	
Department:	PNI-Princeton Neuro Institute	Starting Date:	7/1/2024
Specialist:	Ivy Mong'are	Number of Periods:	3
Sponsors:	The XYZ Foundation	Total Direct:	\$104,052
Internal Submission Deadline:	12/18/2023	Total Indirect:	\$66,593
Certified:	No	Total:	\$170,645
SF424 Link:			

```

graph LR
    Draft([Draft]) --> DR([Department Review])
    DR --> SR([Specialist Review])
    SR --> SpR([Sponsor Review])
    SpR --> Complete([Complete])
    DR --> CR1([Clarification Requested])
    CR1 --> DR
    SR --> CR2([Clarification Requested])
    CR2 --> SR
    SpR --> CR3([Changes Required])
    CR3 --> SpR
          
```

Budgets	SF424 Summary	History	Reviewers	Attachments	Financials	...
Working Budgets						
Name	SmartForm	Date Modified	State	Funding Source	Total	In Financials?
The XYZ Foundation	[Edit]	12/15/2023 3:29 PM	Draft	Foundation/Not For Profit	\$170,645	yes
Cost Sharing for The XYZ Foundation	[Edit]	12/15/2023 3:25 PM	Draft	Institution (Internal)	\$89,683	no

Grants > Kyle CS Demo Proposal 12/15 > Cost Sharing for The XYZ Foundation ? Help

Draft

Cost Sharing for The XYZ Foundation

BU00006135

Cost Sharing Budget

Next Steps

Edit Budget

Printer Version

- [Log General Comments](#)
- [Export Budget](#)
- [Withdraw](#)
- [Manage Tags](#)

10.5 PU Federal

Sponsor: The Trustees of Princeton University **Grand Total:** \$89,683

PI: Martha Gibbs (testpi9) **Budget Type:** Institution (Internal)

Funding Proposal: Kyle CS Demo Proposal 12/15 **Parent Budget:** The XYZ Foundation

Financials	Documents	Snapshots	History	
Current All-Period Totals				
Personnel:	Period 1	Period 2	Period 3	Cumulative
Salaries:	\$13,730	\$14,279	\$14,850	\$42,859
Benefits:	\$10,000	\$10,400	\$10,816	\$31,216
	\$3,730	\$3,879	\$4,034	\$11,643
General:	\$15,000	\$15,600	\$16,224	\$46,824
Professional Services	\$15,000	\$15,600	\$16,224	\$46,824
Total Direct:	\$28,730	\$29,879	\$31,074	\$89,683
Total F&A:	\$0	\$0	\$0	\$0
Project Total:	\$28,730	\$29,879	\$31,074	\$89,683
F&A Costs (Non-Standard)				
Start Date:	Period 1	Period 2	Period 3	Cumulative
	7/1/2024	7/1/2025	7/1/2026	
End Date:	6/30/2025	6/30/2026	6/30/2027	
Indirect Cost Rate:	0%	0%	0%	
Indirect Cost Type:	MTDC	MTDC	MTDC	
Indirect Cost Base:	\$28,730	\$29,879	\$31,074	
Indirect Funds Req.:	\$0	\$0	\$0	

- To view a PDF version of the budget, on the Funding Proposal workspace, click on the Generate Budget PDF hyperlink. Then click the OK button on the pop up window.

Grants > Kyle CS Demo Proposal 12/15 Help

Draft

Kyle CS Demo Proposal 12/15

FP00004258 Funding Proposal

Next Steps

- Edit Funding Proposal
- Printer Version
- Submit For Department Review
- Withdraw Proposal
- Manage Ancillary Reviews
- Manage Relationships
- Manage Tags
- Create Agreement
- Add Attachments
- Copy
- Create Additional Budget
- Export Budget
- Send Email
- Manage Access
- Add Comment
- Display Team COI Information
- Create-Update Cost Share Commitment
- Generate Budget PDF

Proposal Information

PD/PI:	Martha Gibbs (testpi9)
Department:	PNI-Princeton Neuro Institute
Specialist:	Ivy Mong'are
Sponsors:	The XYZ Foundation
Internal Submission Deadline:	12/18/2023
Certified:	No

Budget Information

Starting Date:	7/1/2024
Number of Periods:	3
Total Direct:	\$0
Total Indirect:	\$0
Total:	\$0
PeopleSoft Award ID:	

SF424 Link:

Budgets
SF424 Summary
History
Reviewers
Attachments
Financials
...

Working Budgets

Name	SmartForm	Date Modified	State	Funding Source	Total	In Financials?
Cost Sharing for The XYZ Foundation	[Edit]	12/15/2023 3:25 PM	Draft	Institution (Internal)	\$89,683	no
The XYZ Foundation	[Edit]	12/15/2023 3:17 PM	Draft	Foundation/Not For Profit	\$0	yes

2 items page 1 of 1

Generate Budget PDF

Click OK to generate a PDF summary of the budget. Navigate to the history tab to view the summary.

OK
Cancel

- Then click on the History tab and then click on the PDF hyperlink. This will then show a summarized budget for both the sponsor and the cost share portions of the Funding Proposal.

Budgets
SF424 Summary
History
Reviewers
Attachments
Financials
...

Activity	Author	Activity Date
Budget PDF Generated	Weber, Stacey A	12/15/2023 3:27 PM
GenerateBudgetPDF_FP00004258.pdf		
Created	Weber, Stacey A	12/15/2023 3:06 PM

Princeton ERA Proposal Budget

Proposal:	FP00004258	Start Date:	7/1/2024
Proposal Title:	Kyle CS Demo Proposal 12/15	End Date:	6/30/2027
Sponsor:	The XYZ Foundation		
Prime Sponsor:			
Proposal PI:	Martha Gibbs (testpi9)		
Proposal Department:	PNI-Princeton Neuro Institute		

BU00006134 - The XYZ Foundation

Current All-Period Totals	Period 1	Period 2	Period 3	Cumulative
Personnel:	\$0	\$0	\$0	\$0
Salaries:	\$0	\$0	\$0	\$0
Benefits:	\$0	\$0	\$0	\$0
General:	\$33,333	\$34,666	\$36,053	\$104,052
Materials and Supplies	\$33,333	\$34,666	\$36,053	\$104,052
Total Direct:	\$33,333	\$34,666	\$36,053	\$104,052
Total F&A:	\$21,333	\$22,186	\$23,074	\$66,593
Project Total:	\$54,666	\$56,852	\$59,127	\$170,645
F&A Costs (Standard)	Period 1	Period 2	Period 3	Cumulative
Start Date:	7/1/2024	7/1/2025	7/1/2026	
End Date:	6/30/2025	6/30/2026	6/30/2027	
Indirect Cost Rate:	64%	64%	64%	
Indirect Cost Type:	MTDC	MTDC	MTDC	
Indirect Cost Base:	\$33,333	\$34,666	\$36,053	
Indirect Funds Req.:	\$21,333	\$22,186	\$23,074	

BU00006135 - Cost Sharing for The XYZ Foundation

Current All-Period Totals	Period 1	Period 2	Period 3	Cumulative
Personnel:	\$13,730	\$14,279	\$14,850	\$42,859
Salaries:	\$10,000	\$10,400	\$10,816	\$31,216
Benefits:	\$3,730	\$3,879	\$4,034	\$11,643
General:	\$15,000	\$15,600	\$16,224	\$46,824
Professional Services	\$15,000	\$15,600	\$16,224	\$46,824
Total Direct:	\$28,730	\$29,879	\$31,074	\$89,683
Total F&A:	\$0	\$0	\$0	\$0
Project Total:	\$28,730	\$29,879	\$31,074	\$89,683
F&A Costs (Non-Standard)	Period 1	Period 2	Period 3	Cumulative
Start Date:	7/1/2024	7/1/2025	7/1/2026	
End Date:	6/30/2025	6/30/2026	6/30/2027	
Indirect Cost Rate:	0%	0%	0%	
Indirect Cost Type:	MTDC	MTDC	MTDC	
Indirect Cost Base:	\$28,730	\$29,879	\$31,074	
Indirect Funds Req.:	\$0	\$0	\$0	

2.1.10 Editing the Cost Share Budget

1. On the Funding Proposal page, click on the edit button to view a pop up window to select the section of the budget you want to edit. Or click on the cost share budget name and then click on the Edit Budget button in the left navigation bar.

Draft

Kyle CS Demo Proposal 12/15

FP00004258

Funding Proposal

Next Steps

Edit Funding Proposal

Printer Version

- [Submit For Department Review](#)
- [Withdraw Proposal](#)
- [Manage Ancillary Reviews](#)
- [Manage Relationships](#)
- [Manage Tags](#)
- [Create Agreement](#)
- [Add Attachments](#)
- [Copy](#)
- [Create Additional Budget](#)
- [Export Budget](#)
- [Send Email](#)
- [Manage Access](#)
- [Add Comment](#)

Proposal Information

PD/PI:	Martha Gibbs (testpi9)
Department:	PNI-Princeton Neuro Institute
Specialist:	Ivy Mong'are
Sponsors:	The XYZ Foundation
Internal Submission Deadline:	12/18/2023
Certified:	No

Budget Information

Starting Date:	7/1/2024
Number of Periods:	3
Total Direct:	\$104,052
Total Indirect:	\$66,593
Total:	\$170,645
PeopleSoft Award ID:	

SF424 Link:

```

graph LR
    Draft([Draft]) --> DeptRev([Department Review])
    DeptRev --> SpecRev([Specialist Review])
    SpecRev --> SponsorRev([Sponsor Review])
    SponsorRev --> Complete([Complete])
    DeptRev --> ClarReq1([Clarification Requested])
    ClarReq1 --> DeptRev
    SpecRev --> ClarReq2([Clarification Requested])
    ClarReq2 --> SpecRev
    SponsorRev --> ChangesReq([Changes Required])
    ChangesReq --> SponsorRev
    
```

Budgets	SF424 Summary	History	Reviewers	Attachments	Financials	...
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Working Budgets

Name	SmartForm	Date Modified	State Funding Source	Total	In Financials?
The XYZ Foundation	[Edit]	12/15/2023 3:29 PM	Draft Foundation/Not For Profit	\$170,645	yes
Cost Sharing for The XYZ Foundation	[Edit]	12/15/2023 3:25 PM	Draft Institution (Internal)	\$89,683	no

Grants > Kyle CS Demo Proposal 12/15 > Cost Sharing for The XYZ Foundation

Help

Draft

Cost Sharing for The XYZ Foundation

BU00006135

Cost Sharing Budget

Next Steps

Edit Budget

Printer Version

- [Log General Comments](#)
- [Export Budget](#)
- [Withdraw](#)
- [Manage Tags](#)

Sponsor:

The Trustees of Princeton University	Grand Total:	\$89,683
Martha Gibbs (testpi9)	Budget Type:	Institution (Internal)
Kyle CS Demo Proposal 12/15	Parent Budget:	The XYZ Foundation

Financials	Documents	Snapshots	History	
Current All-Period Totals				
Personnel:	Period 1	Period 2	Period 3	Cumulative
Salaries:	\$13,730	\$14,279	\$14,850	\$42,859
Benefits:	\$10,000	\$10,400	\$10,816	\$31,216
General:	\$3,730	\$3,879	\$4,034	\$11,643
Professional Services	\$15,000	\$15,600	\$16,224	\$46,824
Total Direct:	\$28,730	\$29,879	\$31,074	\$89,683
Total F&A:	\$0	\$0	\$0	\$0
Project Total:	\$28,730	\$29,879	\$31,074	\$89,683

2.1.11 Removing the Cost Share Budget

1. To remove the Cost Share Budget, navigate to the Cost Share Budget SmartForm and click on the Withdraw activity in the left navigation bar.

Grants > Kyle CS Demo Proposal 12/15 > Cost Sharing for The XYZ Foundation Help

Draft

Next Steps

Edit Budget

Printer Version

Log General Comments

Export Budget

← Withdraw

Manage Tags

10.5 PU Federal

Cost Sharing for The XYZ Foundation

BU00006135 **Cost Sharing Budget**

Sponsor:	The Trustees of Princeton University	Grand Total:	\$89,683
PI:	Martha Gibbs (testpi9)	Budget Type:	Institution (Internal)
Funding Proposal:	Kyle CS Demo Proposal 12/15	Parent Budget:	The XYZ Foundation

Financials Documents Snapshots History

Current All-Period Totals	Period 1	Period 2	Period 3	Cumulative
Personnel:	\$13,730	\$14,279	\$14,850	\$42,859
Salaries:	\$10,000	\$10,400	\$10,816	\$31,216
Benefits:	\$3,730	\$3,879	\$4,034	\$11,643

2. In the pop-up window, add any comments or documents you would like to add as to why the Cost Share is being withdrawn and then click the OK button. NOTE: When you withdraw the budget, it will clear out the Cost Share Commitments activity screen at the same time.

Withdraw

1. Comments:

2. Supporting documents:

+ Add

Name
There are no items to display

OK Cancel

2.2 Proposal Stage Princeton ERA Screenshots: Cost Commitments

This section details how to enter Cost Share Commitments into Princeton ERA.

2.2.1 Creating the Cost Share Commitment

1. On the Funding Proposal page, click on the Create-Update Cost Share Commitments activity towards the bottom left navigation bar.

Grants > Kyle CS Demo Proposal 12/15 Help

Draft Kyle CS Demo Proposal 12/15 FP00004258 Funding Proposal

Next Steps

- Edit Funding Proposal
- Printer Version
- Submit For Department Review
- Withdraw Proposal
- Manage Ancillary Reviews
- Manage Relationships
- Manage Tags
- Create Agreement
- Add Attachments
- Copy
- Create Additional Budget
- Export Budget
- Send Email
- Manage Access
- Add Comment
- Display Team COI Information
- Create-Update Cost Share Commitment**
- Generate Budget PDF

Proposal Information

PD/PI:	Martha Gibbs (testpi9)
Department:	PNI-Princeton Neuro Institute
Specialist:	Ivy Mong'are
Sponsors:	The XYZ Foundation
Internal Submission Deadline:	12/18/2023
Certified:	No
SF424 Link:	

Budget Information

Starting Date:	7/1/2024
Number of Periods:	3
Total Direct:	\$104,052
Total Indirect:	\$66,593
Total:	\$170,645
PeopleSoft Award ID:	

SF424 Link:

```
graph LR; Draft --> DeptReview[Department Review]; DeptReview --> SpecReview[Specialist Review]; SpecReview --> SponsorReview[Sponsor Review]; SponsorReview --> Complete[Complete]; DeptReview --> CR1[Clarification Requested]; CR1 --> DeptReview; SpecReview --> CR2[Clarification Requested]; CR2 --> SpecReview; SponsorReview --> CR3[Changes Required]; CR3 --> SponsorReview;
```

Working Budgets

Name	SmartForm	Date Modified	State Funding Source	Total	In Financials?
The XYZ Foundation	[Edit]	12/15/2023 3:29 PM	Draft Foundation/Not For Profit	\$170,645	yes
Cost Sharing for The XYZ Foundation	[Edit]	12/15/2023 3:25 PM	Draft Institution (Internal)	\$89,683	no

2 items page 1 of 1 10 / page

2.2.2 Adding Cost Share Commitments

1. Note that the total Cost Share Budget and Cost Share Commitment are seen on this page. If they do not match, you will see the warning message "The total sum of Cost Share budgets does not equal the total sum of Cost Share Commitments."

Create-Update Cost Share Commitment

Use the form below to create or update the Cost Share Commitment.

1. Cost Share Commitments:

+ Add

Cost Share Type	Fiscal Year	Source Department	Fund	Amount
-----------------	-------------	-------------------	------	--------

There are no items to display

Cost Share Budget Total: \$89,683

Cost Share Commitment Total: 0

The total sum of cost share budgets does not equal the total sum of cost share commitments.

OK

Cancel

2. Click the Add Button

Create-Update Cost Share Commitment

Use the form below to create or update the Cost Share Commitment.

1. Cost Share Commitments:

+ Add

Cost Share Type	Fiscal Year	Source Department	Fund	Amount
-----------------	-------------	-------------------	------	--------

There are no items to display

Cost Share Budget Total: \$89,683

Cost Share Commitment Total: 0

The total sum of cost share budgets does not equal the total sum of cost share commitments.

OK

Cancel

3. Q1: Choose the Cost Share type
4. Q2: Enter in the Fiscal Year the commitment is expected to be received/met
5. Q3: Choose the Department that will be funding the commitment
6. Q4: Choose the Fund that will be funding the commitment
7. Q5: Enter in the amount of the commitment
8. Click either the "OK" button or "Ok and Add Another" button when you have filled out the fields.

Source	Dept	Fund
Faculty AY Salary & Benefits	Contributing Dept's Main Dept	A0000
AR Tuition	DGS-Central Admin Grad Flwshp	A0000
Provost Science Funds	PRV-Faculty & Infrastructure	A0003
SEAS Science Funds	SEA-Sch of Eng & Appl Sci	A0003
DFR	DFR-Ofc Dean for Research	As provided by DFR
Subrecipient Third Party In-Kind Support F&A Unrecovered F&A	Blank	Blank
Department Funds	Dept name or subdept name as provided by the Contributing Dept. (Starts with 3 letter code for the dept or subdept name)	As provided by Contributing Dept.

Create-Update Cost Share Commitment

Use the form below to create or update the commitment.

1. Cost Share Commitments:

+ Add

Cost Share Type
There are no items to display

Cost Share Budget Total: \$89,6

The total sum of cost share

Add Cost Share Commitment

1. * Select Cost Share Type: ?
Faculty Academic Year S&B

2. * Enter Fiscal Year:
2025

3. * Enter Cost Share Source Department: ?
MOL-Molecular Biology

4. * Enter Fund: ?
A0000

5. * Enter Amount:
\$13730

* Required

OK OK and Add Another Cancel













- Review the commitments, and then click "OK and Add Another" to add another row of cost sharing, or click OK to close the "Add Cost Share Commitment" screen. Note that when the grand totals for the Cost Share Budget and Commitment equal each other, the warning message disappears.

Create-Update Cost Share Commitment

Use the form below to create or update the Cost Share Commitment.

1. Cost Share Commitments:

+ Add

	Cost Share Type	Fiscal Year	Source Department	Fund	Amount	
 Update	Faculty Academic Year S&B	2025	MOL-Molecular Biology	A0000	\$13,730	
 Update	Other	2025	PRV-Faculty & Infrastructure	A0003	\$15,000	
 Update	Faculty Academic Year S&B	2026	MOL-Molecular Biology	A0000	\$14,279	
 Update	Other	2026	PRV-Faculty & Infrastructure	A0003	\$15,600	
 Update	Faculty Academic Year S&B	2027	MOL-Molecular Biology	A0000	\$14,850	
 Update	Other	2027	PRV-Faculty & Infrastructure	A0003	\$16,224	

Cost Share Budget Total: \$89,683

Cost Share Commitment Total: \$89,683













OK

Cancel

2.2.3 Editing and Removing the Cost Share Commitments

1. To edit a Cost Share Commitment, click on the Update Button which will allow you edit the previously entered information.
2. To remove a Cost Share Commitment, click on the "x" button on the right-hand side. Then click ok to remove the commitment.

1. Cost Share Commitments:

+ Add						
	Cost Share Type	Fiscal Year	Source Department	Fund	Amount	
 Update	Faculty Academic Year S&B	2025	MOL-Molecular Biology	A0000	\$13,730	
 Update	Other	2025	PRV-Faculty & Infrastructure	A0003	\$15,000	
 Update	Faculty Academic Year S&B	2026	MOL-Molecular Biology	A0000	\$14,279	
 Update	Other	2026	PRV-Faculty & Infrastructure	A0003	\$15,600	
 Update	Faculty Academic Year S&B	2027	MOL-Molecular Biology	A0000	\$14,850	
 Update	Other	2027	PRV-Faculty & Infrastructure	A0003	\$16,224	

Cost Share Budget Total: \$89,683 Cost Share Commitment Total: \$89,683

2.3 Proposal Stage Princeton ERA: Ancillary Reviews

Use the Ancillary Review functionality to obtain approval for Cost Sharing. Follow the instructions in [the “Ancillary Review – Add/Manage for Proposals Quick Guide”](#). See the responsibility section below for more information about when to add ARs and who should receive them.

2.4 Proposal Stage Responsibilities

Department

- Completes cost sharing budget in Princeton ERA
- Completes cost sharing commitment activity in Princeton ERA
- Adds Ancillary Review to ORPA Director to obtain approval for voluntary cost share.
- Adds Ancillary Reviews to obtain cost share approval from all departments committing cost share that are outside of the proposal submitting department (see note and examples below)

ORPA GCA

- Reviews cost sharing commitment

*Please note more detail and examples below:

- **Voluntary cost share:** Cost Share Ancillary Review to ORPA Director is required for approval.
- **Mandatory or voluntary cost share committed by the proposal submitting dept:** No department AR. When the department approver approves the proposal, their proposal approval includes approving the cost share commitment made by the submitting department.
- **Mandatory or voluntary cost share committed by a different dept than the proposal submitting dept:** Submitting dept admin sends the cost sharing commitment AR to the manager of the department committing cost share (who may have delegated approval or may request chair approval), or the following Organizations as appropriate:
 - “SEA-Sch of Eng & Appl Sci”
 - “PRV-Ofc of the Provost”
 - “DFR-Ofc Dean for Research”

- Example: Proposal submitting dept is EEB, but MOL is committing cost share for this EEB proposal. There must be a cost share AR to MOL.
- Example: Cost share that is committed by SEAS, Provost, and/or DFR: Must have AR to the SEAS, Provost, and/or DFR organizations.
- No AR is required for cost shared tuition.

3 Award Stage

3.1.1 Cost Sharing Rules

1. A separate project is not created for cost sharing because the sponsor budget and cost sharing budget are included in one PS project budget.
2. The commitment and budget reflects all years of cost sharing, regardless of when the funds are transferred via an assignment journal or how sponsored funds are awarded.
 - Cost sharing commitment includes cost sharing types by Fiscal Year, source Dept, Fund, and amount.
 - Cost sharing budget includes PS budget items by Dept, Fund, and amount. The cost sharing budget is not by year.
3. The Fund is the same for the commitment and the budget.
4. Commitment dept is the source of the cost sharing. See chart at the end of this document for guidance on Dept #s.
5. Budget dept is the project owning dept, and cost sharing dollars always are moved by assignment journal to the project owning dept, project # and activity except:
 - Faculty AY salary & benefits are not moved. Dept # is the Contributing Dept's Main # (Fund A0000). Therefore, the cost sharing budget Dept might not be the project owning dept for this case.
 - AR Tuition is not moved. Dept # is the project owning dept (Fund A0000).
 - See chart at the end of this document for guidance on Dept numbers.
6. If approved by the sponsor, Subrecipient, Third Party In-Kind Support, F&A and Unrecovered F&A should be included in the Princeton ERA commitment and cost sharing budget, and on the cost sharing budget form. The commitment will be included in the PS cost sharing commitment but not in the PS budget (tracked offline). This is because there is no Dept nor Fund for these types of cost sharing sources, so a Chartstring cannot be created for them.

3.1.2 Award Cost Sharing Process

1. If the cost sharing commitment changed between proposal and award, the Dept must:
 - Update the cost sharing commitment in the "create-update cost sharing commitment" activity
 - Update the cost sharing budget in Princeton ERA
 - Revise the cost sharing budget form while the proposal is in the "JIT Changes Requested" state
 - Then submit the proposal to their ORPA Specialist.
2. ORPA Award Specialist enters the commitment and budget into PS Grants.
3. NOA is sent to Dept, PI, and SRA.
4. Assignment journals are created by the department to move the funding except for Faculty AY S&B and Tuition. See Assignment Journals section.
5. Cost sharing is charged to the Cost Sharing Chartstring on the NOA. (Note process difference for AR Tuition in section 5.3 below.)
6. IW Reports can be used to view cost sharing commitments, budgets, and expenses. See the Reports section.

3.1.3 Cost Sharing Budget Form Example

Budget Item Code/Description	Dept.	Source Fund	Amount	Notes
AIARTU: Assistantship AI/AR Tuition	23307	A0000	\$ 46,000.00	
SALRF: Salary Faculty	23300	A0000	\$ 30,000.00	
FRINGE: Fringe Benefits	23300	A0000	\$ 10,000.00	
Third Party In-Kind Support			\$ 70,000.00	

Example: Awarding dept is 23307, and cost sharing included tuition, faculty salary and benefits, and third party in-kind support. See chart at the end of this document for guidance on Dept and Fund #s.

4 Assignment Journals

Upon receiving the NOA, Departments that have committed cost share funds need to initiate assignment journals to transfer cost sharing dollars from the cost sharing source to the project owning department. Exceptions:

If the cost sharing source is Provost or DFR funding, ORPA will initiate assignment journals.

Faculty AY Salary & Benefits and AR Tuition are not moved by assignment journals.

Some departments may assign the entire cost share amount up front; otherwise the department providing the cost share will assign cost sharing incrementally. If the sponsor awards all funding up front, but the Dept moves funding year by year (or on some other incremental basis), then the Dept will need to track and create the assignment journals when funding needs to be moved in those cases. For example, ORPA initiates the Assignment Journal process at the start of each FY for Provost funding regardless of how the sponsor funds the award.

4.1.1 Assignment Journal Notes

1. Assignment journals keep the same Fund.
2. Project owning departments will see the funds from the assignment journals appear as revenue on the Spendable Balance and Ledger Detail reports

4.1.2 Assignment Journal Initiator Chart

Source to Project Owning Dept	Initiates Assignment Journal
From One Dept to Another Dept <ul style="list-style-type: none"> • From Physics to Chemistry 	Source Dept.
From main Dept # to subdept # in the same hierarchy <ul style="list-style-type: none"> • From 24400 PNI-Princeton Neuro Inst. to 24415 PNI-Real-Time Imaging 	Authorized Dept. Personnel
From one subdept to another subdept in the same Dept hierarchy <ul style="list-style-type: none"> • From 24407 PNI-Scully Center to 24415 PNI-Real-Time Imaging 	Authorized Dept. Personnel
SEAS Science Funds	Source Dept.
Provost Science Funds	ORPA

DFR	ORPA
AR Tuition	Not Moved
Faculty AY Salary & Benefits	Not Moved

4.1.3 Assignment Journal Initiation

- If you have rights to create assignment journal:
 - Navigate to the Prime Portal and click on Journals
 - Select Assignment Journals and press Create Journal

4.1.4 Assignment Journal Examples

Example: Cost share commitment to be assigned from Department: MAE 25100 to Project Owing Department: ECE-Research 23105. The source row may or may not have a Program.

Example below: Assigning cost sharing from one dept to another dept's project

	Department	Fund	Account	Program	Project	Activity
Debit:	25100	E2349	4803 (Assignment Out)	FA123	Leave Blank	Leave Blank
Credit:	25402	E2349	4802 (Assignment In)	Leave Blank	10001234	101

*Journal Purpose
Transfer cost sharing commitment from ... to ...

Line Detail	Find	View All	First	1-2 of 2	Last					
Sel	*Amount	*Description	*Department	*Fund	*Account	Program	Site	Project	Activity	Reference
<input type="checkbox"/>	1	25000.000	CS TO 10001234	25100	E2349	4803	FA123			
<input type="checkbox"/>	2	-25000.000	CS FR ...	25402	E2349	4802		10001234	101	

Lines to add: 1

Attachments (0)

Line Totals

Total Debits	25000.000	Total Credits	-25000.000
--------------	-----------	---------------	------------

Example below: Assigning cost sharing from one dept to project owning dept in the same dept hierarchy (the source row may or may not have a Program).

*Journal Purpose
Transfer cost sharing commitment from ... to ...

Line Detail	Find	View All	First	1-2 of 2	Last					
Sel	*Amount	*Description	*Department	*Fund	*Account	Program	Site	Project	Activity	Reference
<input type="checkbox"/>	1	25000.000	CS TO 10001234	23100	E2349	4803	FA123			
<input type="checkbox"/>	2	-25000.000	CS FR ...	23105	E2349	4802		10001234	101	

Lines to add: 1

Attachments (0)

Line Totals

Total Debits	25000.000	Total Credits	-25000.000
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Save Save and Edit Save and Submit

4.1.5 Assignment Journal Initiation

If you have access to create assignment journals, you can see all assignment journals that have been created for your project.

- Navigate to the Prime Portal and click on Journals.
- Select Assignment Journals and press Search Journal.

- Remove your user ID from the User ID box, enter the Project ID and click search. The bottom of the screen will show the assignment journals that have been made so far. Click on a row to view the details.

5 Charging Cost Sharing

5.1.1 Charging items (Non-Personnel)

- An item is charged as cost sharing when the Project # is used, and the Fund is not a G fund
- The NOA provides the cost share Chartstring(s) against which all cost share expenses should be charged
- Cost Share Chartstring for items except Faculty AY S&B and AR Tuition:
 - Department = Project Owning Dept.
 - Fund = Fund of the cost sharing source
 - Account = expense code for the item
 - Program = N/A
 - Project = PS Project ID
 - Activity = 101

5.1.2 Charging items (Faculty AY Salary)

- Departments should charge Faculty Academic Year Salary & Benefits against their own A0000 general funds budget at the main dept level (ends in 00) since it is linked to the A0000 teaching budget, which cannot be reallocated to a sub-dept.
- Cost Share Chartstring for Faculty AY S&B:
 - Department = Main unit (ends in 00), regardless of Project Owning Dept
 - Fund = A0000
 - Default Account = one of the Salary – Faculty codes
 - Program = N/A
 - Project = PS Project ID
 - Activity = 101
- Faculty AY Salary and Benefits example from LA

02/01/2015	001		8.081	.081	7,198.80	PRINU	25200	A0000	<input type="checkbox"/> 5003		GRANT	10001234	101
------------	-----	--	-------	------	----------	-------	-------	-------	-------------------------------	--	-------	----------	-----

5.1.3 Charging items (AR Tuition)

- The Graduate School provides 100% AR tuition subsidy as part of the University’s new policy effective Fiscal Year 23. When charging sponsored research awards, the AR salary will be charged to a G fund, and then the corresponding tuition will be charged to fund A0000.
- When AR Salary is charged to a Project on a G fund, the AR tuition line needs to be distributed as follows:

08/01/2022	102		100.000	1.000	40,000.00	PRINU	24500	G0001	5202			GRANT	10010956	101
	142		100.000	1.000	60,410.00	PRINU	24500	A0000	5602	AC390		GRANT	10010956	101

- The first line of the screenshot is initiated by the department and creates the distribution for AR tuition on the G fund and project
 - The user then creates the second distribution line to cost share 100% of the AR tuition to the same department and project, but to the A0000 fund, and AC390 program.
- Cost Share Chartstring for AR Tuition:
 - Department = Same as Project Owning Department.
 - Fund = Charged as the A0000 fund.
 - Account = 5602 (Assistants in Research Tuition)

- Program = AC390
- Project = PS Project ID
- Activity = 101

6 Managing Cost Sharing

6.1 Managing Cost Sharing Chartstrings (Available Balances & Expenditures)

1. Leverage the NOA which provides all cost share chartstrings
2. Develop internal practices for charging cost share expenditures when multiple chartstrings are involved.
3. Run the Spendable Balance report on a monthly basis to monitor available balances on cost share funds
 - a. Factors to Consider:
 - i. If feasible, charge against one chartstring at a time
 - ii. Spend down the converted cost share fund A0016
4. Reminder: Cost share expenditures for AR Tuition and Faculty AY Salary are automatically processed via Labor Accounting once in effect.

7 Responsibilities at the Award Stage

Department

- Revises Cost Sharing Commitment and Budget in Princeton ERA, and revises CS budget form, if commitment changed between proposal and award stages
- Completes Cost Sharing Budget form prior to award setup
- After receiving NOA, initiates Assignment Journals as needed
- If Dept does not move all cost sharing up front, moves cost sharing on periodic basis
- Charges and manages cost sharing

ORPA

- ORPA Specialist cost sharing commitment and budget
- Award Specialist adds cost sharing commitment and budget to PS Grants
- Office Manager initiates assignment journals for Provost and DFR funds
- If Provost or DFR does not move all funding up front, Office Manager moves cost sharing on periodic basis

SRA

- Validates cost share expenditures to ensure allowability and compliance with federal regulations, award terms and conditions and university policies.
- Ensures cost share commitment was fully met for financial reporting to awarding agencies.

8 IW Reports

1. Funds from the assignment journals appear as revenue on the Spendable Balance report and Ledger Detail report.
2. These reports in the University Financials – Prime folder in the IW include cost sharing:

Sponsored Research Report	Cost Sharing By...
Spendable Balance report	Shows beginning balance, revenue, expenses, encumbrances and ending balances by Fund
Ledger Detail	Expense by Dept., Fund, Account, Project

Sponsored Award Summary	Budget categories and expense by Award
Sponsored Project Summary	Budget items and expense by Project
Notice of Award	Commitment and budget dollars by Award
Cost Share	Commitment, budget, expenses and assignment journal dollars by Dept or Award
Sponsored Project Detail*	Expense by Award or Project

9 Converted Awards and Cost Sharing

1. Commitments for all converted awards at Prime Go-Live (7/1/2014) were manually copied from Coeus Awards module to PS Grants
 - Commitments are included for Accepted and Closed awards.
 - Commitments are for the entire length of the award
 - 43 awards were converted that had Fund 30 child accounts
 - 16 awards were converted that had cost sharing from Fund 20's (pre-Fund 30 days)
2. Cost Sharing Budgets are for cost sharing converted from Fund 30's only
 - Budgets for Fund 20's (prior to Fund 30's) are tracked offline like they were pre-Prime
 - Cost sharing budgets were added to Accepted awards only and were not added to Closed awards
3. Was any cost sharing money moved before 6/30/14?
 - If yes, SRA provided the budgets for money that was previously moved
 - If no, the GCAs reached out to depts for cost sharing budgets, or Grants Managers sent the budgets to ORPA.
 - ORPA Award Specialists entered the cost sharing budgets into PS Grants.
4. Fund A0016 is the Fund for converted awards that had cost sharing dollars moved before 6/30/14. This is because the true source of the cost sharing dollars cannot be traced.
5. If cost sharing dollars are moved after 6/30/14 for a converted award, Fund A0016 cannot be used. The process for moving cost sharing dollars for converted awards after 7/1/14 is the same process as moving cost sharing dollars for new awards.
6. What if some but not all of the money was moved for a converted award prior to 6/30/14?
 - Then the cost sharing budget for all award years was not included in the budget on the NOA. This was addressed during data cleanup.
 - Depts will need to move the cost sharing dollars for the remainder following the Assignment Journal process for new awards.
7. Fund A0016 cannot be used for any new awards.

10 Commitment/Budget Dept/Fund chart for Princeton ERA "create-update cost share commitment" activity and cost sharing budget form

1. **Amounts:** Commitment and budget reflect all years of cost sharing, regardless of how the sponsor funds the award.
2. **Fund and Dept** as per the chart below.
3. **Commitment Year:** Fiscal Year

Source	Commitment Dept*	Budget Dept**	Commitment & Budget Fund
Provost Science Funds	51005: PRV-Faculty & Infrastructure	Project Owning Dept	A0003

SEAS Science Funds	25000: SEA-Sch of Eng & Appl Sci	Project Owning Dept	A0003
DFR	51700: DFR-Ofc Dean for Research	Project Owning Dept	Commitment and budget Fund should match
AR Tuition	40000: DGS-Central Admin Grad Fllwshp	Project Owning Dept	A0000
Faculty AY Salary & Benefits	Contributing Dept's Main # (ends in 00) / Main Dept Name	Contributing Dept's Main # (ends in 00)	A0000
Dept Funds	Dept name or subdept name as provided by the Contributing Dept. (Starts with 3 letter code for the dept or subdept name)	Project Owning Dept	Commitment and budget Fund should match
Subrecipient Third Party In-Kind Support	Leave Blank	Include this type on the form, but leave Dept blank on the form. Not included in PS Budget (Tracked offline)	Include this type on the form, but leave Fund blank on the form.
F&A*** Unrecovered F&A***	Leave Blank	Include this type on the form, but leave Dept blank on the form. Not included in PS Budget (Tracked offline)	Include this type on the form, but leave Fund blank on the form.

*Commitment in the "Create-Update Cost Share Commitment" activity in Princeton ERA, PS Award Commitment, NOA Commitment

**Budget Form, PS Project Budget & NOA Cost Sharing Budget

*** F&A, Unrecovered F&A, Subrecipient and Third Party In-Kind Support should be included in the Commitment in the "Create-Update Cost Share Commitment" activity in Princeton ERA and Budget Forms only if approved by the sponsor.

11 Need Help? Who to Contact

Need help with....	Contact
Cost share commitment activity in Princeton ERA	ORPA GCA
Cost share budget process	ORPA GCA
Assignment journal process	Financial Services Center
Managing cost share expenses	SRA Analyst

