Setting up a Cost Share Account
If the Award List screen is already open, select the menu option **Edit > New Award…**

Or click on the **Maintain Award** button.

Otherwise, select the menu option **Maintain > Awards…**

Or click on the **Maintain Award** button.

**Close** the Award Search window.
Select the menu option **Edit > New Award**.

Or click on the **New Award** button.

Search for the Proposal you awarded under the parent account using any combination of the available fields.

Select the correct proposal and click **OK**.
**Award Detail Screen:**

ALWAYS select **Hold** for the Award status from the drop-down list.

**Sponsor Award No.:** C/S ABC1234 (agency/org # of prime account)

**Begin Date:** The date spending is officially allowed on the account. In this case, it is the same as the Effective Date.

**Effective Date:** Effective date of cost share, usually the same as the effective date of prime account.

**Execution Date:** LEAVE BLANK

**Sponsor:** Internal Funding: Arizona State University local and state mix  
Internal Funding: Vice Provost for Research (VPR) Cost Share Only

**Award Type:** Other

**Account Type:** Cost Share – Other (dept., college and VPR), Cost Share – 3rd Party, or Cost Share – VPR Only

**Title:** This information is carried over from the proposal. If the title is different than the one listed on the sponsor award notice, change title in accordance with sponsor award. Title changes should not be made in the proposal database.

**Other Header Screen:**

**Template:** Select the Cost Share Companion Account Template.

Fill in the Prime Sponsor/ASU Consortium field if applicable. **NOTE:** **Federal** prime sponsors should be listed only. Refer to Appendix A for Prime Sponsor/ASU Consortium Data Entry.

The payment basis and method fields will be populated automatically.
Money and End Dates Screen:

**Obligated Amount:** Amounts obligated to date; sponsor cost share provided to date under the award. Obligated Total must be equal to or less than Anticipated Total.

**Anticipated Amount:** Sponsor cost share anticipated for the entire project – current obligation plus anticipated incremental cost share.

**Obligation Effective Date:** LEAVE BLANK.

**Obligation Expiration Date:** End date of current funding period. Must be the same as or earlier than final expiration date.

**Final Expiration Date:** Expiration date of currently funded period plus anticipated unfunded periods, including possible option years.
Contacts Screen:

This screen will not be automatically populated by clicking on the Sync button to synchronize the information from the sponsor template chosen in the Other Header screen. Sponsor information as well as contact information must be manually entered. Highlight one of the fields under Contact List and click the Modify button to search for the contact person or sponsor in the Rolodex.

A search is performed by using any combination of the available fields.

Select the right contact and click OK.

The contact’s name or sponsor is now listed under the Name/Organization column. If the person is not in the Rolodex, you will need to add her/him to it. Refer to Maintaining the Rolodex on the web at http://researchadmin.asu.edu/coeus/help/ Proposal Data Entry: Lesson 2: Maintaining the Rolodex. If there are multiple contacts, click on the Add button to insert another contact.

**WARNING:** Do not click on the Sync button after you enter contact information. The information will be deleted if you do.


**Reports Screen:**

Click on the **Sync** button to synchronize the sponsor’s reporting requirements from the template chosen under the “Other Header” screen. If additional reporting requirement need to be entered, first select the Technical/Management option under the Class window. Once the Technical/Management option is selected, the requirements can be entered by selecting the **Modify** button. The type of report is shown in the Type window.

**WARNING:** Manually entered reporting requirements will be deleted if you click on the **Sync** button.

**Terms Screen:**

Click on the **Sync** button to synchronize the sponsor’s terms from the template chosen under the “Other Header” screen. Terms are entered by selecting each option under the Terms window. Once an option is selected, terms are added or deleted by using the **Add** or **Delete** buttons.

**WARNING:** Manually entered terms will be deleted if you click on the **Sync** button.
**Investigator Screen:**

This tab will show all the investigator names that where entered at the proposal stage. It will also show the name of the assigned Administrator of each investigator’s unit. There should be **ONLY ONE** PI and **ONE** Lead Unit. **DO NOT** enter the % Effort for each investigator.

You can Add Investigators as well as Units but you **should not** delete them.

![Image of Investigator Screen]

**Comments Screen:**

Use this tab to see award-specific comments related to Categories, Fiscal Report, Intellectual Property, etc. A good place to indicate if this project has any related accounts (i.e. prime account) is under General Comments.

![Image of Comments Screen]

**Subcontract Screen:** Do not complete.

**Other Screen:**

This tab contains specific information pertaining to the type of award. See *Setting up a New Award* for table information and term definitions.

![Image of Other Screen]
5. CAS (A-E): Sponsored Projects Officers should NOT complete this section.

6. Prime Agreement Number: LEAVE BLANK

Cost Sharing:

Open the Cost Sharing Screen by selecting the menu option **Details > Cost Sharing**...

If there is any cost share information **Delete** it.

Indirect Cost:

Open the Indirect Cost Screen by selecting the menu option **Details > Indirect Cost**...

**Indirect Cost Screen:**

The required fields are Rate, Type, Fiscal Year, Start Date, Campus and Recovery Type. This screen gets automatically populated when a proposal gets funded. Multiple indirect cost rates can be entered. **DO NOT** enter an end date unless the indirect cost rate has expired and a new rate is in effect.

**Rate:** 0
**Type:** MTDC
**Recovery Type:** Internal Waiver
Click **OK** to close the Indirect Cost screen.

**Special Review Screen:**

Open the Special Review screen by selecting the menu option **Details > Special Review…** Enter the internal waiver review by clicking on **Add** and selecting Internal F&A Waiver from the Special Review Drop down list. Click **OK** to close screen.

Save ![Save](button) when you have completed your work.

All the previous information must be entered in order to request an Agency/Org number but don’t forget you still have to check the allocation.

**Allocation:**

Select the menu option **Details > Allocation…**
Or click on the Allocation button.

Technically, there shouldn’t be any allocation on a cost share account. But because we cannot clear out the allocation percentages, the PI should have the entire allocation.

Award Allocation Screen:

The Fiscal Year Total should always add up to 100. Only one RID Unit should be checked. The Allocation Start Date should always be a year earlier than the Begin Date of the award and the Allocation End Date should always be a year after the Final Expiration date of the award. Save allocation when done.

Save when you have completed your work. You are now ready to request an AGENY/ORG number.
Request an account number by selecting the menu option Details > Account…

Or click on the Account button.

Awards Account Number Screen:

Make sure all the information is correct before creating a new account number. If the information is correct, click Create New Account. The Use Existing Account… button should not be used under any circumstances. If the information is not correct, close the window and make the required changes.

A Warning before the systems creates an account number will be given. If you are sure you want to create a new Account number click Yes.

The next screen will give you the new account number. Click OK.
Then click **Close**.

The new account is now displayed in the Award Detail Screen.

Save and close the award screen.

If the current activation must get updated and the paperwork has NOT gone to SPA/GCA, use the **Edit** button to make any corrections. Otherwise, prepare a new activation using the **New Entry** button. Any corrections to the Money and End Dates Screen will create a new amount sequence number in the award history when you save.