



Boston College
Office for Sponsored Programs

BUSINESS PROCESS

**TRACKING MANDATORY COST SHARING
IN PEOPLESFT GRANTS**

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Business Process Description

This document explains how to track mandatory cost sharing in PeopleSoft Grants.

To comply with federal audit requirements, properly accounting for cost sharing is necessary. This is a shared responsibility of the PIs, Department Chairs, School Deans, Center/Institute Directors, Provost, Vice Provost for Research, and the Office for Sponsored Programs.

Key Assumptions

The reader is familiar with the following Business Process Documents located on PeopleSoft Financials website:

- [Travel/Expense Step-By-Step Guide](#)
- [AP Voucher Step-By-Step Guide](#)
- [ePro Step-By-Step Guide](#)

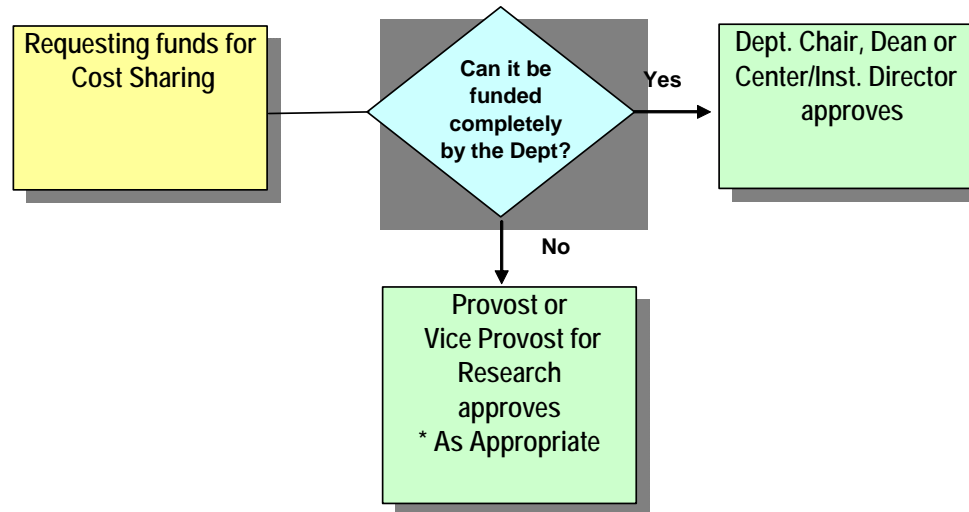
Mandatory Cost Share Definition

Required contributions on the part of the University which are explicitly stated in the sponsor's program announcement and are identified and/or incorporated by reference in the sponsored project award document. If the University offers cost-sharing in the proposal or application over and above the sponsor's stated requirements and the sponsor incorporates the proposal or application by reference in the sponsored project award document, the offered cost-sharing becomes mandatory.

Cost Share Approvals

All cost sharing, whether it is mandatory or voluntary, must receive prior approval from the appropriate University official(s). Below is a flow chart of the approval process from the University official(s).

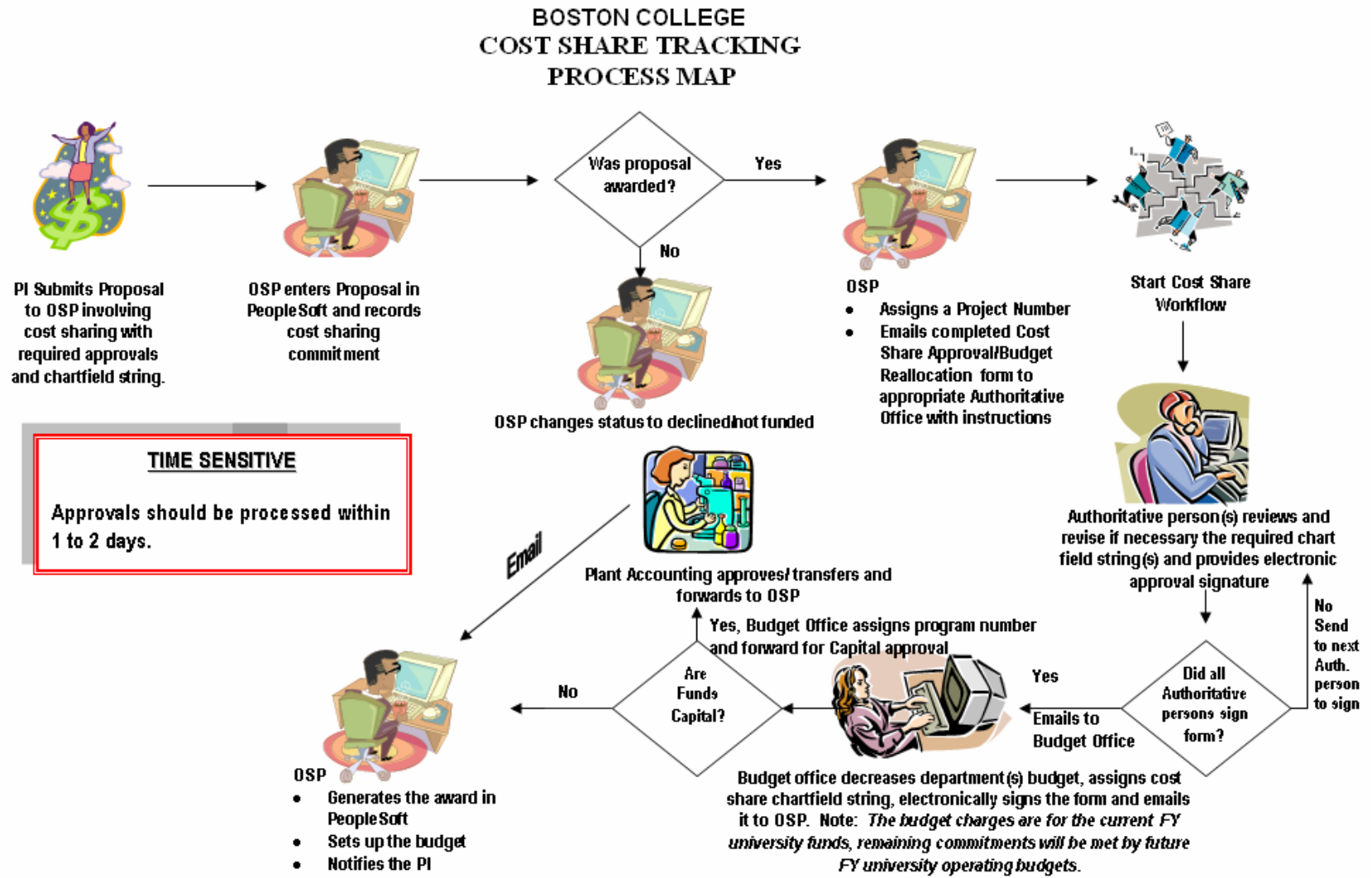
Cost Share Approval Flow Chart



* As appropriate for mandatory

Provost	Vice Provost for Research
Faculty Salaries	Faculty Salaries
Creation of new programs	Cost share in excess of sponsor policy
	Reduction/Waiver of F&A
	Reduction/Waiver of Fringe Benefits
	Construction or renovation
	Other Direct Cost

Cost Share Tracking Process Map



Cost Share Tracking Process Detail

Principal Investigator

The PI must submit to OSP a proposal transmittal with the required approvals, a proposal, and a proposed budget. The proposal transmittal should specify whether cost sharing is requested. It also should specify the chartfield string(s) where the cost share funds will come from.

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**Boston College
Office for Sponsored Programs
Proposal Transmittal Form**

Purpose: Research Training Other

Type: New Competitive Continuation* Non-competitive Continuation*
 Renewal* Supplement* Resubmission/Revision

*Current BC Project ID: _____

Principal Investigator/Project Director: XingXing Yu
 First time PI: yes no Phone: 552-3975 Fax: _____
 Department/School: Computer Science Bldg. Fulton Room: _____
 Department ID No: 053901
 Proposal Title: Clare Booth Luce Professorship

For Submission to: Henry Luce Foundation

Project Period: Start Date: 05/01/2005 Termination Date: 05/31/2010

First Year Budget:
 Direct Costs \$ 113,600 F&A Costs \$ 0 Total \$ 113,600
 Project Period Budget:
 Direct Costs \$ 600,000 F&A Costs \$ 0 Total \$ 600,000

LIST KEYWORDS ASSOCIATED WITH THIS PROJECT: _____

APPROVALS: As a general rule, all proposals for extramural support of sponsored projects must be processed through the Office for Sponsored Programs (OSP) for approval. OSP approval is contingent upon submission of a fully-executed Proposal Transmittal Form with each proposal. The Proposal Transmittal Form must always be signed by the Principal Investigator and Department Chairperson. In addition, the following approvals are required as specified:

Dean: Must approve all proposals involving full or substantial waivers of F&A costs, buy-out of faculty time, cost-sharing for which departmental funds are unavailable, establishing new programs, curricula, or institutes or when space, construction or renovations are being requested.

Associate Vice President for Research: Must approve all proposals involving requests for full or substantial waivers of F&A costs, fringe benefits and buy-out of faculty time.

OSP will obtain approval from the Academic Vice President when the proposal includes requests for departmental funds are requested and school/departmental funds are unavailable (other than for construction or renovation, or creation of new programs. Since these approvals also require approval from the Department Chair and/or Dean, and will require detailed justification, requests require initiation at the earliest possible time. Principal Investigators are strongly encouraged to obtain approval from the Department Chair and/or Dean as soon as it is known that a sponsored project proposal will require AVP approval.

TIMING OF PROPOSALS: The complete proposal must be submitted to OSP three weeks before the sponsor's receipt deadline. A complete proposal includes the transmittal form, cover page, and any other forms required by the sponsor. If any changes are made to the proposal subsequent to obtaining the required approvals which significantly change the scope of the proposal or budget, amend the signed forms or alter proposed University commitments, the changes must be cleared through OSP prior to submission to the sponsor.

Principal Investigator/Project Director: _____ Date: _____
 Department Chairperson: _____ Date: _____
 Dean (IF REQUIRED): _____ Date: _____
 Academic VP or Assoc. VP for Research (IF REQ.): _____ Date: _____

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PLEASE COMPLETE THE FOLLOWING ITEMS

Cost-Sharing/Matching Commitments: This Project will /will not require allocation of University funds. Cost sharing/matching funds are (please check): Mandatory Voluntary

These additional funds are /are not available from the resources of the Principal Investigator's department or school for the project period indicated.

If funds for cost-sharing /matching are **not** available from departmental or school resources, approval is required by the Dean and Academic Vice President. The Associate Vice President for Research must approve total or substantial waivers of F&A costs.

Amount of cost sharing/matching requested: \$ 565,861

Please explain the need for University contribution (i.e. tuition, \$10,000; computers, \$5,000):
 Travel, summer salary, benefits, start-up costs

Please identify specific source of funds, enter complete chartfield strings: *If you need additional space, attach a separate sheet*

Dept ID	Fund	Fund Source	Program	Function	Account	Property	Amount
053901	100	10000	00000	601	50300	00000	10,000
053901	100	10000	00000	601	64001	00000	138,452
053901	100	10000	00000	601	64001	00000	417,409

Reason for Additional/Renovated space (check as appropriate):

Relief of Insufficient Space on Existing Project [] (If checked, please explain in Comments section below and include number of individuals using the space).

Space for Additional Personnel [] (If checked, please explain in Comments section below and include number of individuals using the space).

Accommodate New Equipment []

Other (please specify): _____

If the start date of your space needs differs from the start date of your sponsored project, please provide the approximate date when your requested space needs will begin: _____

Additional Comments: _____

Conflict of Interest: A New or Competing Renewal proposal to (1) NSF, (2) NIH, (3) another organization submitting a new or renewal application to NSF or NIH, or (4) a commercial concern must be accompanied by a completed Conflict of Interest Disclosure. For non-competing continuation applications to those sponsors, if you completed a disclosure in accordance with the University's Conflict of Interest Policy within the last 12 months for this particular project, has any condition changed such that your answers to any of the questions on the disclosure form would be different from your previous disclosure? No Yes If yes, please complete an updated disclosure and provide it to the Director, Office for Sponsored Programs in a sealed envelope along with your project proposal.

The Principal Investigator must also ensure that others working on the project who are responsible for its design, conduct or reporting will complete conflict of interest disclosures and updates as well.

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PIs must submit chartfield string for cost share at the proposal stage.

Tracking Mandatory Cost Sharing in PeopleSoft Grants

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Intellectual Property Agreement: The Principal Investigator is responsible for ensuring that students and other employees working on a project have signed an Intellectual Property Agreement.

In submitting this form to OSP, the Principal Investigator states that all students and other employees working on this project (aside from clerical and support staff) have signed and have on file with OSP an Intellectual Property Agreement in accordance with the University's Intellectual Property Policy.

OSP will, upon request, send the Principal Investigator copies of the Intellectual Property Agreement for each person who may need to sign the Agreement.

Buy-Out of Faculty Time: The project will / will not involve a buy-out of faculty time. Requisite arrangements are explained as follows (requires approval signatures of the Dean and the Associate Vice President for Research):

Specify number of course buyouts or percent effort for each person by year/semester:

Yr 1 97.77% buyout Luce \$88,000 - AVP - \$2,000

Specify dollar amount of the buyout for each person by year/semester:

Yr 1 \$88,000 academic year 05-06

Information Processing Support: Significant information technology components are defined as computing hardware, software, and services that require Information Technology technical support services, connection to the network, or the purchase of nonstandard hardware or software. Proposals containing significant information technology components require consultation with the IT Director of Academic Research Services (ARS) at the earliest possible time in the proposal process. The Principal Investigator in submitting such a proposal agrees to consult with ARS prior to submission or, in any event, no later than seven (7) days after the proposal has been submitted to the sponsor. Further information can be found in University Policy 1-600-150, Information Technology – Review of Sponsored Projects and Gifts from Private Sources.

Budgets: In submitting this form, the Principal Investigator assures the University that the amounts listed in the proposed budget for all listed direct cost items appear to be adequate for the performance of the proposed work.

Research Subjects, Materials, and Select Agents: Please check the following items as appropriate. For those items checked, the required review and approval by the relevant University committee(s) has been or will be obtained as required by the policies of the funding sponsor and the University.

Human Subjects will / will not be used in this project. Animals will / will not be used in this project.

Hazardous Materials will / will not be used in this project. If so, list the materials below.

Radioactive Materials will / will not be used in this project. If so, list the materials below.

Select Agents will / will not be used in this project.

rDNA and biological agents of a BL rating greater than "1" will / will not be used.

If a BL rating greater than "1" will be used, please list under "other" all agents and associated BL ratings. If you are planning to use agents with a BL rating of "2" or greater – or if you have questions – you must contact the University's Office of Environmental Health and Safety (EHS) and the Chair of the University's Institutional Biosafety Committee (IBC).

Research and development exemption under TSCA (Toxic Substance Control Act) will / will not apply. A "will not" response means that the compound in question is being used for non-commercial research and development purposes. More information on the Toxic Substance Control Act can be obtained via the following website: <http://www.epa.gov/opptintr/newchems/rddexemp.htm> The EHS website is: http://www.bc.edu/bc_org/fcp/ehs/

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Please check any items that will be used in or pertain to this project:

Lasers Ionizing Radiation Non-Ionizing Radiation Electromagnetic Radiation

Radio-frequency Radiation Linear Accelerators Personal Protection Equipment

Microwaves Magnetic Fields Explosive Materials Carcinogenic Materials

Toxic Materials Other (please specify/attach sheet if necessary):

OSP Internal Use Only

Annual Budgets:

	Year 1	Year 2	Year 3	Year 4	Year 5	Total
Tot. Direct	\$113,600	\$116,768	\$120,031	\$123,392	\$126,209	\$600,000
F&A						
Total						
Pringe Rate	9%					
F&A Rate	0					

Sponsor Type:

Federal State government agency Local government agency
 Foundation Corporation

Nonprofit Subcontract under Federal Prime Subcontract under non-Federal Prime

Cost Sharing:

	Year 1	Year 2	Year 3	Year 4	Year 5	Total
Amount	\$155,700	\$178,302	\$188,980	\$20,717	\$22,160	\$565,861

Type of Cost Sharing: Tuition Remission Salary Equipment
 Other Direct F&A

Source of Cost Sharing: PLEASE INDICATE BC ACCOUNT NO.

Department Funds 053001.020001.033501 University Funds _____
 External Funds _____ (letter provided)

Breakdown cost-sharing in comments section.

Comments:

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Tracking Mandatory Cost Sharing in PeopleSoft Grants

Proposed Budget example

								Cost Share	
	Yr 1	Yr 2	Yr 3	Yr 4	Yr 5	5-Yr Sum	Luce \$\$	BC \$\$	BC Source
CBL Prof Sal. - Luce	88,000	90,640	93,359	96,160	99,045	467,204	467,204		
CBL Benefits Luce	8,000	8,000	8,000	8,000	7,355	39,355	39,355		
CBL Prof. Fund - Luce	17,600	18,128	18,672	19,232	19,809	93,441	93,441		
Subtotal requested Luce	113,600	116,768	120,031	123,392	126,209	600,000	600,000		
Travel	2,000	2,000	2,000	2,000	2,000	10,000		10,000	Dean A&S (053001)
CBL Prof. Fund - BC	400	412	424	437	450	2,123		2,123	Provost (020001)
CBL Prof. Sal. - BC	2,000	2,060	2,122	2,185	2,250	10,617		10,617	Provost (020001)
CBL Prof. summer sal.		20,000	20,000			40,000		40,000	Provost (020001)
CBL benefits - BC	14,050	14,712	23,393	16,095	17,462	85,712		85,712	Provost (020001)
Subtotal fac. Support BC	18,450	39,184	47,939	20,717	22,162	148,452		148,452	
Startup Costs									
Post-doc	50,000	51,500	53,045			154,545		154,545	EVP (033501)
Post-doc benefits	12,250	12,618	12,996			37,864		37,864	EVP (033501)
Other Startup	75,000	75,000	75,000			225,000		225,000	EVP (033501)
Subtotal startup BC	137,250	139,118	141,041			417,409		417,409	EVP (033501)
Total Program Cost	\$269,300	\$295,070	\$309,011	\$144,109	\$148,371	\$1,165,861	\$600,000	\$565,861	

OSP

OSP enters the proposal in PeopleSoft Grants and records the cost-share commitment on the Budget Line Summary page. To enter the cost-share amount, you click on the **Cost Share** button on the line number item you want to cost share. In this example, you click on Line #30.

Budget Line Summary

Proposal: 29004 SBIR Phase III D01 Task 1 **PI:** Sullivan,Brian F
Version: V5 **Project:** 29004
Budget: STANDARD **Budget Period:** 1 07/01/2005 / 09/30/2006 **FA**
Currency: USD **Target Sponsor Budget:** 80,000.00 **Modular** **Cost Share**

Budget Line Summary									
Summary Line Data									
Line #	Category	Description	Details	Total Direct	Sponsor Direct	Cost Share	Institution C/S	Third Party C/S	
10	51300	Research Associate FT Ex		32,965.00	32,965.00	Cost Share			+ -
20	70011	Benefits Exempt		8,076.00	8,076.00	Cost Share			+ -
30	68902	Travel Domestic		15,739.00	10,739.00	Cost Share	5,000.00		+ -

Sponsor Direct:	51,780.000	Sponsor FA:	28,220.11	Total Sponsor Budget:	80,000.110
Institution C/S:	5,000.00	Inst C/S FA:	2,725.00	Total Inst C/S Budget:	7,725.00
Third Party C/S:	0.00			Total TP C/S Budget:	0.00
Total Direct:	56,780.000	Total FA:	30,945.11	Total Budget:	87,725.110

Tracking Mandatory Cost Sharing in PeopleSoft Grants

Once you click on the Cost Share button of the line number you want to cost share, you will get the Summary Cost Sharing page: Enter the Cost Share Direct Amounts and Department ID.

Summary Cost Sharing

Budget Period: 1 07/01/2005 / 09/30/2006 **Currency:** USD
Budget Line Number: 30 **Category:** 68902 Travel Domestic

Cost Sharing

Total Direct: 15,739.00 **Cost Share Percent:** 31.77
Sponsor Direct: 10,739.00 **Cost Share Direct:** 5,000.00

Cost Sharing Distribution

Institution Find | View All First 1 of 1 Last

Department	AVP Dean of Faculties	C/S Pct	C/S Direct	
050001		100.00	5,000.00	+ -

Third Party Find | View All First 1 of 1 Last

Description	C/S Pct	C/S Direct	
			+ -

Distribution Totals: 100.00 5,000.00

OK Cancel

OSP enters cost share amounts and selects department. If there are multiple departments, the user clicks the plus icon for additional rows. Once all the cost share information is entered, the user clicks the OK button.

Once the proposal is funded, OSP will assign a project number and email a completed CSAF according to the proposal transmittal to the authoritative office for approval/signature. The email will provide information on who should be signing the form. See next page for CSAF.

Notes:

- ❖ Documentation on how to use the form will have to be sent out.
- ❖ We may have to train users on how to use the forms.
- ❖ Adobe Acrobat Professional should be installed on users' computers.
- ❖ Approvals are time sensitive (one to two days).

OFFICE FOR SPONSORED PROGRAMS



Cost Sharing
Approval/Budget Reallocation Form

Principal Investigator: _____ Department/School: _____
 Project Title: _____
 Sponsoring Agency: _____
 Budget Period Start Date: _____ Budget Period End Date: _____ Year ____/____
 Project Chartfield String: Dept.: _____ Fund Code: _____ Fund Source: _____ Program: _____ Function: _____ Property: _____ Project: _____

Mail to:

- Approver 1
- Provost
- Vice Provost for Research
- Budget Office
- OSP

The email buttons can be used as a workflow along with information in the email sent for signing the form. The person can click the appropriate button for the next approval/signature.

University Cost Sharing is defined as a portion of the total project or program expenses related to a sponsored agreement that is contributed by BC and not charged to the sponsor. BC is responsible for accounting of all costs attributable to the project, including cost sharing. Please remember that any quantifiable cost (mandatory or voluntary) offered in the proposal becomes a legally binding and accountable commitment of BC upon the award and that all costs must be allowable under OMB Circulars A21 and A110. **This form should be used to identify the department(s) chartfield string where the cost share funds will be obtained.** If cost share includes faculty contributed effort, please state the percentage of effort in the appropriate column and the individual's name under "Description."

This form is completed by OSP and forwarded to the Authoritative Office(s) upon notification of an award with mandatory cost sharing. The Authoritative person will review/revise if necessary the chartfield string(s) and electronically sign and forward the form to the Budget Office. The Budget Office after decreasing the appropriate department(s) budget will assign the cost share chartfield string, electronically sign the form and forward it back to OSP. The form is routed from OSP to Authoritative Office(s) to Budget Office and then back to OSP and is **required prior to project set up**

OSP will fill out the CSAF with information provided from the proposal transmittal. The authoritative person(s) can edit the chartfield strings as necessary.

There will be at least one transaction line per approver to provide discrete approval per line according to funds the appropriate approver has discretion to approve.

Description:	Budget Period	Dept. ID	Fund	Fund Source	Program	Function	Property	Account	Total Direct Amount \$
Grand Total \$									0.00

Approved by: _____
 Department/School _____ Date _____
 Approved by: _____
 Provost _____ Date _____
 Approved by: _____
 Vice Provost for Research _____ Date _____
 Approved by: _____
 Budget Office _____ Date _____

Budget Office Only			
Budget Reallocation was completed on			
Fund	Fund Source	Program	Function
120	10000		

The Budget Office will fill in the date when the budget reallocation took place and fill in the required cost share chartfield string and electronically signs the form.

Authoritative person(s) will electronically sign the CSAF.

Authoritative Office/Persons

The authoritative office/person(s) will review/revise chartfield strings and sign the CSAF electronically. The email sent by OSP will have instructions informing them who should get the CSAF next.

Budget Office

The Budget Office will decrease the department(s) budget according to the CSAF and will assign a unique program number to link to the grant number. The Budget Office will use broad category expense account numbers for budget use only.

Function codes specific to cost sharing will be set up:

- 303 – Research
- 107 – Instructional
- 803 – Other

See below example:

Cost Share Account Flow							
Dept.	Fund	Fund Source	Program	Function	Account	Project/Grant	Amount
Original Budget Chartstring							
053901	100	10000	00000	101	53100		-100
Transfer out to set aside Cost Share							
053901	100	10000	12345	107	53111		100
Budget set up on fund 120 PG ledgers							
053901	120	10000	12345	107	53100	5000999	100

The Budget Office will assign a cost-share chartfield string, electronically sign the form and email it to OSP.

OSP

Once OSP receives the CSAF from the Budget Office, OSP will generate the award. When the award generation process is run, the system computes the cost-sharing amount to be brought forward into the award using the information set up within the pre-award environment. When the post-award budget is established, the cost-sharing totals brought forward will need to be verified and if necessary, adjusted. The chartfield strings from the CSAF will need to be entered. Also, the department number should be the same as fund 500. Once this is complete, OSP will notify the PI.

'Analysis Group: GBUD 'Type: CBU 'Date: 02/23/2006 Status: Active 1 Amount: 5,000,000 USD

Detail Fund Distribution at Resource Level Customize | Find | First 1 of 1 Last

Budget Category	'GL Unit	Dept	Fund	Fund Source	Program	Function	Property	Account
1 68902	EAGLE	051301	120	10000	12345	303	00000	68902

Department will be the **same** as fund 500

Fund Code will **always** be fund 120 for cost share

Fund Source will be 10000 – (different from fund 500)

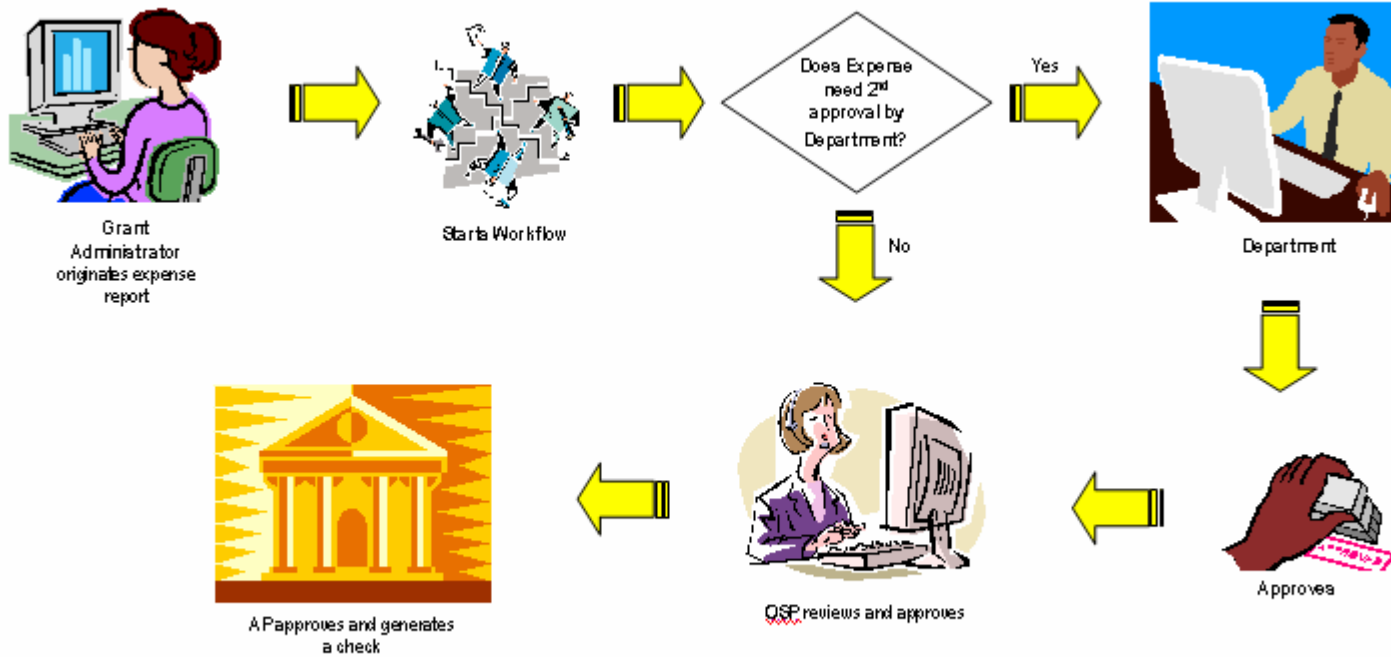
A unique program number will be assigned to link to the grant number - (different from fund 500)

Function codes **specific to cost sharing** will be set up - (different from fund 500)

For reporting and analysis, F&A costs on cost-shared dollars are stored only in the Grants system with a resource analysis type of CFA and *not* in the General Ledger. Cost-share budgets have a resource analysis type of CBU.

Expenses

Workflow requirements for processing expenses will be the same as fund 500. See below diagram.




Tracking Mandatory Cost Sharing in PeopleSoft Grants

Processing expense reports is the same except the end user will have to enter the appropriate cost-share chartstrings.

Refer to the [Travel/Expense Step-By-Step Guide](#), Page 4, Number 11 on the PS Financials website.

11. Perform tasks below:

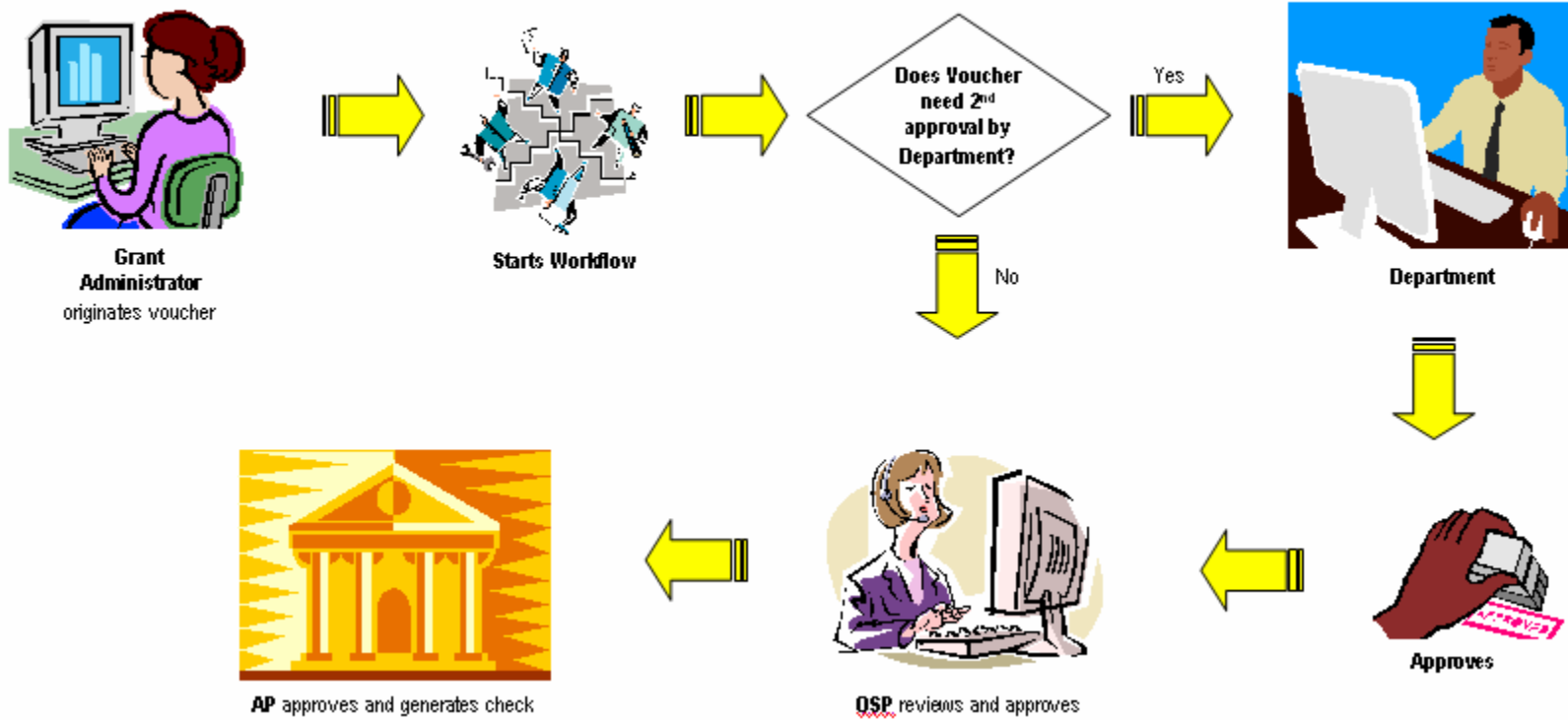
In This Field	Enter
Fund	Required (3 digits) User will have to enter 120
Fund Source	Required (5 digits) User will have to enter 10000
Program	Required (Zero's or 5 digits) User will have to enter a unique assigned program number
Function	Required (3 digits) User will have to enter assigned function code for cost share
Property	Required (Zero's or 5 digits)
Project/Grant	Required 7 digits User will have to enter Project/Grant number Note: If transacting against a grant, first click , scroll to the right, Business Unit: GRANT, Project: Your Project Number, Activity ID: STANDARD

Note:

- ❖ Users will have to be educated about the different chartstrings for cost-share processing.

Vouchers

Workflow requirements for processing vouchers will be the same as fund 500. See below diagram.



Tracking Mandatory Cost Sharing in PeopleSoft Grants

Processing vouchers is the same except the end user will have to enter the appropriate cost-share chartstrings.

Refer to the [AP Voucher Step-By-Step Guide](#), Page 5, Number 9 on the PS Financials website.

9. Perform tasks below:

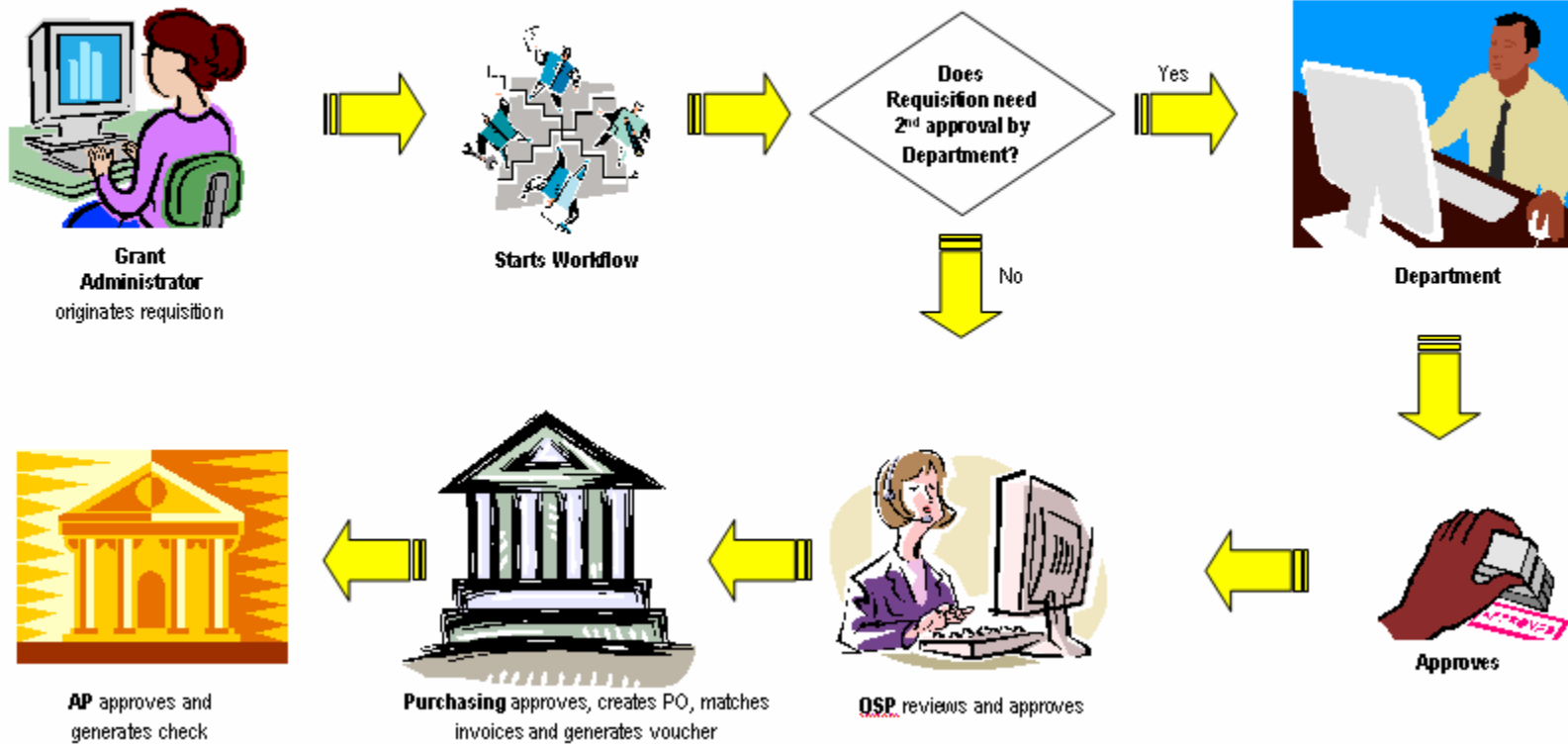
In This Field	Enter
Department	Required (6 digits)
Fund	Required (3 digits) User will have to enter 120
Fund Source	Required (5 digits) User will have to enter 10000
Program Code	Required (Zero's or 5 digits) User will have to enter a unique assigned program number
Function	Required (3 digits) User will have to enter assigned function code for cost share
Property	Required (Zero's or 5 digits)
Account	Required (5 digits)
Projects	Required 7 digits User will have to enter Project/Grant number

Note:

- ❖ Users will have to be educated about the different chartstrings for cost-share processing.

Requisitions

Workflow requirements for processing requisitions will be the same as fund 500. See below diagram.



Tracking Mandatory Cost Sharing in PeopleSoft Grants

Processing requisitions is the same except the end user will have to enter the appropriate cost-share chartstrings.

Refer to the [ePro Step-By-Step Guide](#), Page 5, Number 14, Page 7, Number 16 and Page 9, Number 38 on the PS Financials website.

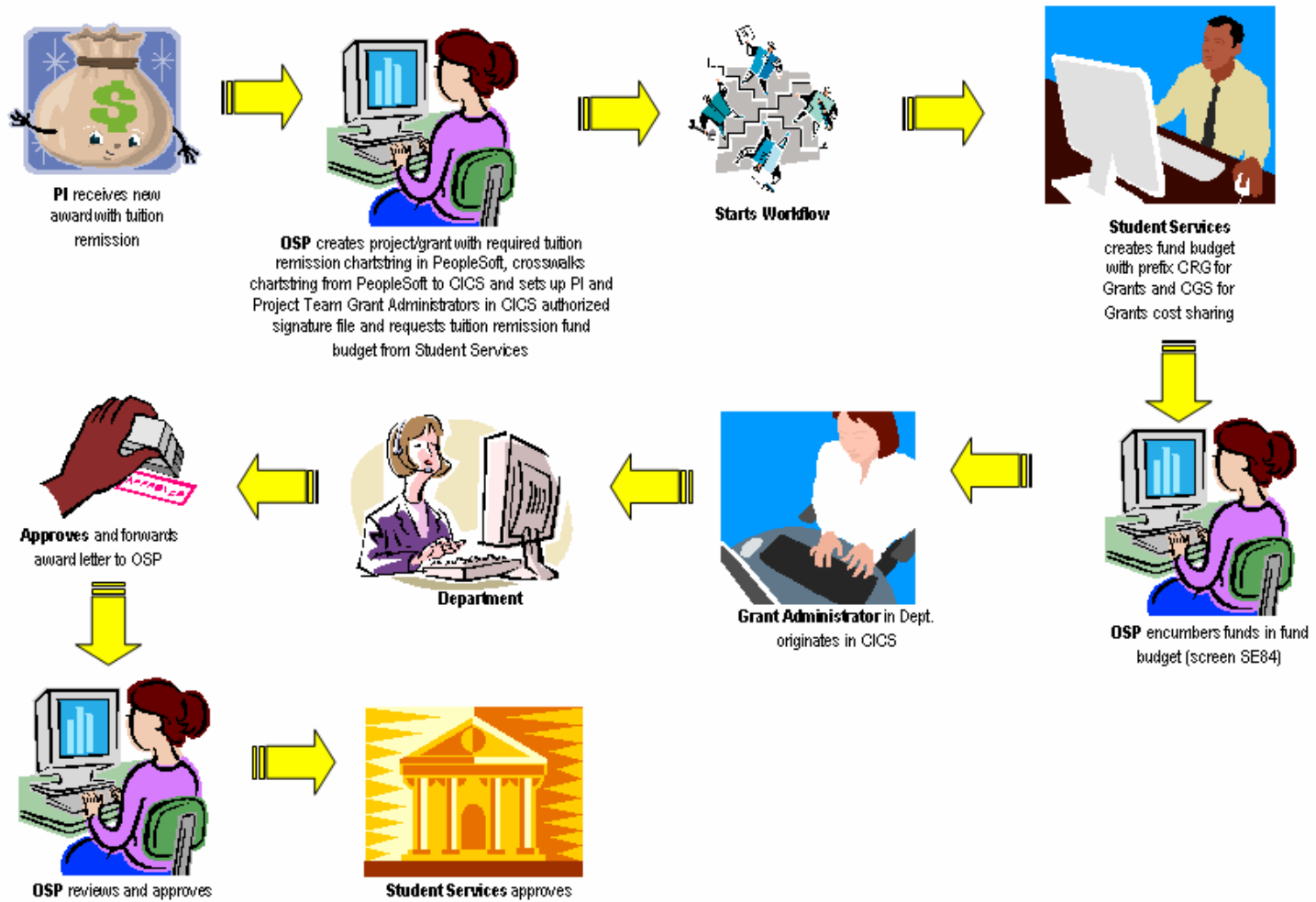
In This Field	Enter
Fund	Required (3 digits) User will have to enter 120
Fund Source	Required (5 digits) User will have to enter 10000
Program Code	Required (5 digits-zero's or values) User will have to enter a unique assigned program number
Function	Required (3 digits) User will have to enter assigned function code for cost share
Property	Required (5 digits-zero's or values)
Project/Grant	Required 7 digits User will have to enter Project/Grant number

Note:

- ❖ Users will have to be educated about the different chartstrings for cost-share processing.

Tuition Remission

Workflow Approval Diagram



Process

OSP receives new award with tuition remission and creates project chartstring in PeopleSoft. See below example of Project Funding page.

Project Funding

Unit: GRANT **Project/Grant:** B.C. Evaluative Research Proje **Status:** 0

*Analysis Group	*Type	*Date	Status	Sequence	Amount	Currency	BD Unit	Description
GBUD	BUD	07/25/2005	Active	1	150,000.000	USD		

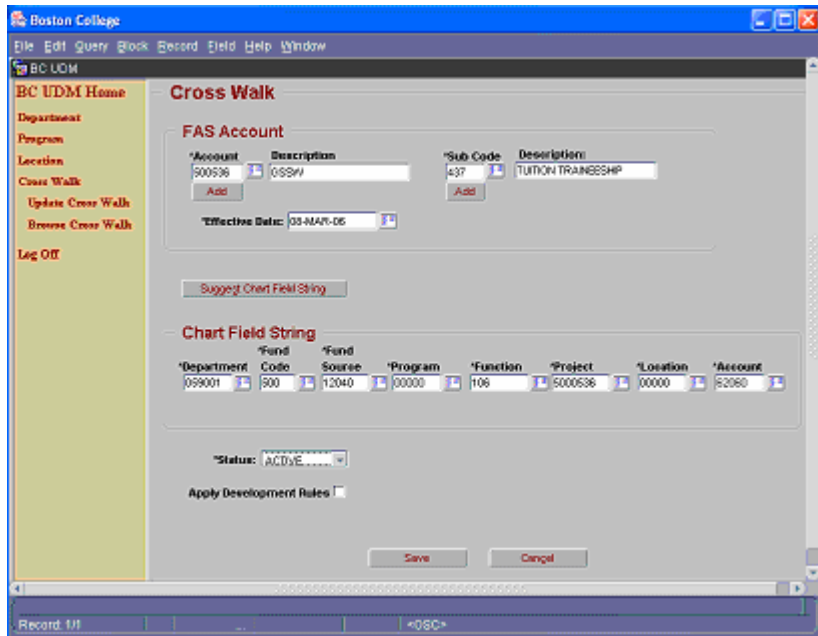
Detail Fund Distribution at Resource Level								
Resource Detail		General Ledger Detail		Commitment Control Detail		Grants Detail		
Activity ID	Budget Category	Resource Quantity	Amount	Currency	BD Unit	Description		
1 STANDARD	50010	1.00	51,761.000	USD	EAGLE	Salary Faculty FT OSP		
2 STANDARD	53330	1.00	44,102.000	USD	EAGLE	Grad Research Assistant		
3 STANDARD	62060	1.00	28,974.000	USD	EAGLE	Aid Tuition Assistance		
4 STANDARD	68390	1.00	2,240.000	USD	EAGLE	Professional Independent Svcs		
5 STANDARD	70011	1.00	13,171.000	USD	EAGLE	Benefits Exempt		
6 STANDARD	65200	1.00	3,000.000	USD	EAGLE	Equipment		
7 STANDARD	64355	1.00	400.000	USD	EAGLE	Computer Software under 5K		
8 STANDARD	68300	1.00	1,000.000	USD	EAGLE	Printing		
9 STANDARD	68730	1.00	5,352.000	USD	EAGLE	Supplies General		

General Ledger Detail

3	62060	EAGLE	055201	500	12040	00000	301	00000	62060
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Tracking Mandatory Cost Sharing in PeopleSoft Grants

OSP crosswalks chartstring from PeopleSoft to CICS (Oracle UDM Crosswalk). See below screen shot.



Tracking Mandatory Cost Sharing in PeopleSoft Grants

OSP sets up PI and Project Team Grant Administrators in CICS authorized signature file. See below screen shot.

```
Winsock 3270 Telnet - bcvmcms.bc.edu
Connect  Close  Exit  Edit  Print Screen  Setup  Help
AK99          AUTHORIZED POSITION MASS ENTRY          NAME: S.FREEDMAN
TYPE ACCT SUB POSITION POSITION DESC RESPON AMT REQ *MESSAGES*
08 500000 437                                     1
-----
4334
5335

AUTHORIZED BY: CONTROLLER
EFFECTIVE DATES:
DEPT:
TYPE COPY LINE, HIT ENTER
NUM                                     10:44:10 IBM-3278-2
```

OSP requests tuition remission fund budget from Student Services.

Student Services creates fund budget with prefix GRC for Grants and CGS for Grants cost sharing.

OSP encumbers funds in fund budget (screen SE84).

```
Winsock 3270 Telnet - bcvmcms.bc.edu
Connect  Close  Exit  Edit  Print Screen  Setup  Help
SE84 GRCU1006 FUND BUDGET INFO UPDATE          DATE: WED MAR 08, 2006
FUND NAME:
AWARD LETTER TITLE: SON TR E.M.                FIN AID YR: 2006
FUND COMPLETE INDICATOR: 1 - COMPLETE          ACCOUNT: 521834429

          CLD          NEW
BUDGET FIRST YEAR:          0          0
BUDGET UNDERCLASSMEN:      0          0
BUDGET GRADUATE:           5268       5268
MAXIMUM FIRST YEAR:          0          0
MAXIMUM UNDERCLASSMEN:      0          0
MAXIMUM GRADUATE:           5268       5268
BUDGET CONTROLLED:

***** MESSAGES *****
NUM                                     10:45:17 IBM-3278-2
```

Tracking Mandatory Cost Sharing in PeopleSoft Grants

Project Team Grant Administrator in department originates in CICS, department second approves then department forwards award letter to OSP. See below screen shots.

```
Winsock 3270 Telnet - bcvmcms.bc.edu
Connect Close Exit Edit Print Screen Setup Help
LOOK SYSTEM MENU NAME: J.KANE
DATE: TUE MAR 07, 2006
***YOUR LAST ACCESS WAS VIA CONNECTION TP43 ON 03/07/06 (TUE) AT 12:34 PM***
ENTER SELECTION NUMBER OR TRANSACTION ID: ag01
01 ACCOUNTING/P-CARD 16 LOG OFF
02 ADVISORS
03 BOOK - CAMPUS PHONE BOOK
04 BUILDINGS/GROUNDS
05 DOCU - PROGRAM DOCUMENTATION
06 FORMS - REQUESTS/NOTIFICATIONS
07 MANAGEMENT INFORMATION SYSTEMS
08 MEMO - MESSAGES
09 OFFICE SYSTEMS
10 STUDENT ACCOUNTS RECEIVABLE
11 STUDENT SYSTEM
12 UBUY - REQUISITIONS
13 UVIEW - YOUR BC RECORDS
14 WEB BASED
15 WORK - WORKSTATION CONFIGURATION
*NOTE: TO RETURN TO "LOOK" FROM ANY OTHER SCREEN, PRESS THE PF7 KEY*
NUM 12:37:42 IBM-3278-2
```

```
Winsock 3270 Telnet - bcvmcms.bc.edu
Connect Close Exit Edit Print Screen Setup Help
FINANCIAL AID AWARDS AG01 NAME J.KANE
FINANCIAL AID AWARDS
01 ATHLETIC AID
02 GRAD FINANCIAL AID
03 MISCELLANEOUS
K RETURN TO SYSTEM MENU
L LOGOFF CICS
TYPE SELECTION HERE AND PRESS ENTER--> 2_
NUM 12:39:25 IBM-3278-2
```


Tracking Mandatory Cost Sharing in PeopleSoft Grants

```
Winsock 3270 Telnet - bcvmcms.bc.edu
Connected  Close  Exit  Edit  Print Screen  Setup  Help

                GRADUATE FINANCIAL AID      AG08  NAME J.KANE

1  CREATE NEW AWARDS                9  REVIEW TUITION REMISSION AWARDS
2  REOPEN AWARDS BEFORE FA ACCEPTANCE 10 BROWSE AWARDS BY ACCT
3  ADJUST AWARD AFTER FA ACCEPTANCE  11 BROWSE BY DEPT
4  RECORD DEPT APPROVAL OF AWARD
5  GRAD AWARD SEARCH BY STUDENT NAME
6  DISPLAY TUITION REMISSION FUNDS
7  DOWNLOAD AWARD LETTER
8  MODIFY LETTER TYPE
K  RETURN TO SYSTEM MENU            R  RETURN TO FINANCIAL AID MENU
L  LOGOFF CICS                      M  RETURN TO MAIN MENU

TYPE SELECTION HERE AND PRESS ENTER-->
NUM                                12:39:51 IBM-3278-2
```

```
Winsock 3270 Telnet - bcvmcms.bc.edu
Connected  Close  Exit  Edit  Print Screen  Setup  Help

                AG76
                NAME: J.KANE

ENTER STUDENT SOCIAL SECURITY #
TO SEARCH STUDENT FILE TYPE NAME AND ?, OR ?
TO SEARCH ADMISSIONS FILE TYPE NAME AND !, OR !

SOCIAL SECURITY #: _____ HOME OR TERM ADDRESS(H OR T) T
NAME:
ADDRESS:
ADDRESS:
CITY:
STATE:  ZIP:
COUNTRY(IF NOT USA):
TELEPHONE: -

ENTER SCHOOL YEAR FOR AWARD 05 - 06

TYPE R TO RETURN TO PREVIOUS MENU
TYPE M TO RETURN TO MAIN MENU --> _ PRESS ENTER
NUM                                12:40:33 IBM-3278-2
```

Tracking Mandatory Cost Sharing in PeopleSoft Grants

```

Winsock 3270 Telnet - bcvmcms.bc.edu
FINANCIAL AID AWARDS
AG71 AWARD SELECTION LIST NAME: J.KANE

AWARDS FOR THE ACADEMIC YEAR: 05 - 06
AWARD DESCRIPTION AWARD ACCOUNT BUDGET AMT REQ AWARDED
8 SOE TR DB GRC02 500751437
9 LSOE TR DS GRC07 500723437
10 SOE TR MR GRC08 500795437
11 SOE TR S.B. GRC09 521350437
12 SOE TR M.B. GRC24 521352437
13 L.S.O.E. TITLE 2 SUMMER GRC51 521336429

** PRESS ENTER TO PAGE FORWARD **
TYPE M TO RETURN TO MAIN MENU OR
R TO RETURN TO PREVIOUS MENU OR
TYPE SELECTION CODE HERE AND PRESS ENTER --->
NUM 12:43:20 IBM-3278-2
    
```

OSP reviews and approves from RP97/98 screens

```

Winsock 3270 Telnet - bcvmcms.bc.edu
RP97 REVIEW REQs FOR CONTRACTS/GRANTS APPROVAL NAME: S.FREEDMAN
DATE: TUE MAR 07, 2006
PAYEE DATE TIME PO/REQ# ORIGINATOR PRIOR APPROVER
1 SHULKIN,SANDIE D 02/22/06 16:24 1577424 H.DUMAY M. TAYLOR
2 O'CONNELL,JULIE A 09/16/05 11:39 1570544 K.DCHERTY N. TAYLOR
END OF APPROVAL LIST

TYPE SELECTION CODE HERE AND PRESS ENTER --
NUM 13:18:55 IBM-3278-2
    
```

```

Winsock 3270 Telnet - bcvmcms.bc.edu
RP98 DISPLAY AWARD INFORMATION FOR APPROVAL DATE: TUE MAR 07, 2006
NAME: S.FREEDMAN
LEBY NO: 1577424 DATE ORIG: 02/22/2006 ORIG: H.DUMAY
AWARD: GRC67 AWARD AMT: 3,112.00
YEAR: 2006 OTHER AMOS 2 OTHER AMT 9,336.00
COMMENTS: NONE TOTAL AID 12,448.00

STUDENT: SS NUMBER: 06 - GSSW
ADDRESS: SCHOOL:

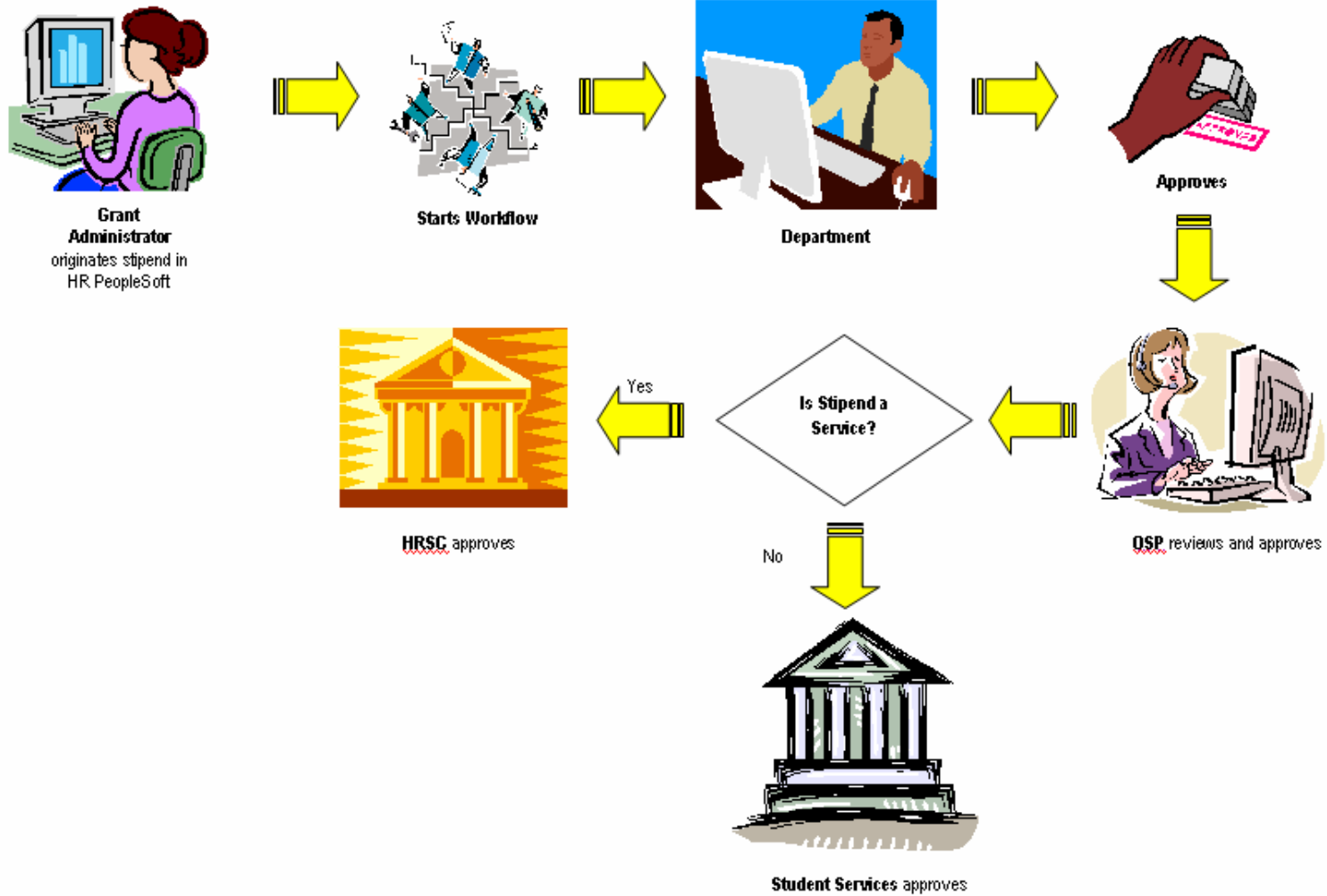
DESCRIPTION ACCOUNT AMOUNT
GSSW SLDAM TR 500584437 3112.00
END OF LIST

1 APPROVE REQUISITION R RETURN TO APPROVAL LIST
2 SUSPEND REQUISITION
R BROWSE REQUISITION IN DETAIL
TYPE SELECTION CODE HERE --->
NUM 13:21:02 IBM-3278-2
    
```

Student Services approves.

Grad Stipends

Workflow Approval Diagram



Process

Once cost-sharing dollars have been moved into the appropriate chartfield strings, the project team grant administrator originates stipend in HR PeopleSoft.

PeopleSoft

Home Worklist Help

Home > BC Custom > BC Custom > Use > Graduate Service Stipends [New Window](#)

Graduate Stipends

Grad Stipend Number: 010322 Approval Action: Denial Comments

EmpID: 68887625 Soto, Mauricio Status: Processed by HRMS
 437 Cambridge St #33
 Allston MA Preferred Address: Home Address

School Year: 2006 Job Code: 190250 **Budget for HR Account Code**
 Department: 057481 Center Retirement Research **Current Budget**
 Award Code: SRP02 SPONSORED RESEARCH
 HR Account Code: 57481-500-12040-533300002

DeptID	Fund	Fnd Srce	Program	ProjGet	Property	Func	Account
057481	500	12040	00000	5000674	00000	301	53330

Award Amount: 5800.00 Num of Sections: [Add Second Distribution](#)

Primary Distribution [View All](#) [First](#) [1 of 1](#) [Last](#)

HR Account Code	Monthly Amount	Budget	Start Date	End Date
Project 57481-500-12040-533300002	5220	10,440	02/01/2006	03/31/2006

Secondary Distribution [View All](#) [First](#) [1 of 1](#) [Last](#)

HR Account Code	Monthly Amount	Budget	Start Date	End Date
Project 57481-500-12040-533300001	580	1,160	02/01/2006	03/31/2006

[Save](#) [Return to Search](#) [Add](#) [Update/Display](#)

The department approves from work list.

Tracking Mandatory Cost Sharing in PeopleSoft Grants

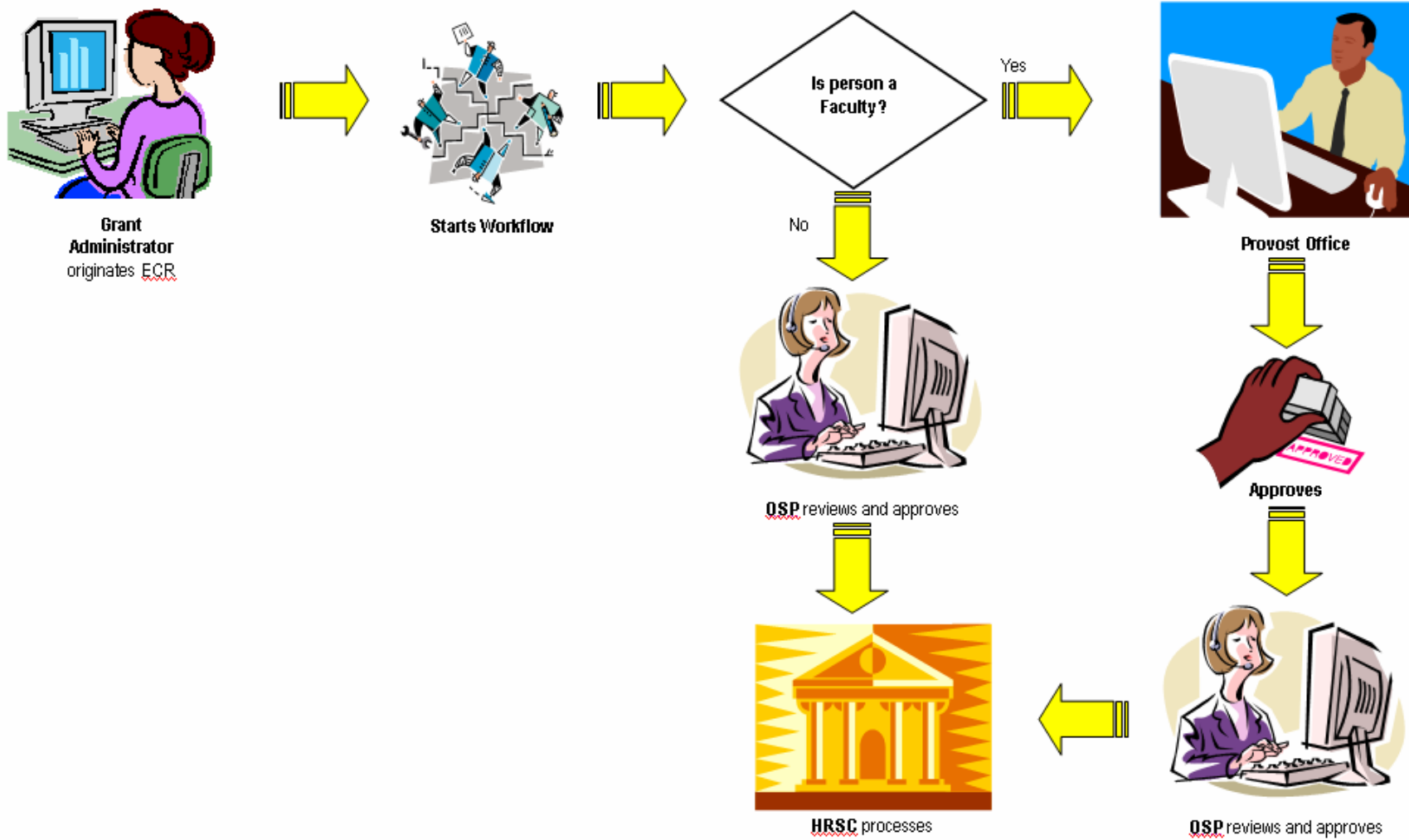
OSP reviews and approves from work list.

Service stipends workflow to HRSC for approval and processing

Non-service stipends workflow to Student Services for approval.

Salary

Workflow Approval Diagram



Tracking Mandatory Cost Sharing in PeopleSoft Grants

Process

Once cost-sharing dollars have been moved into the appropriate chartfield strings the project team grant administrator or Provost Office (for faculty) completes Employee Change Request (ECR) and forwards to OSP for budgetary approval. See below example of Employee Change Request (ECR).

EMPLOYEE CHANGE REQUEST

I.

Name	Regina Research	Empl Status	Active	Hire Date	09/01/1998
Eagle ID	36961391	Annual Salary	60,000	Rehire Date	08/08/2005
SSN	000-00-0000	Last Action Date	08/24/2005	Last Incr Date	08/08/2005
Record #	0 Primary Job	Job Entry Date	08/08/2005	Citizenship Status	
Salary Plan	PA1	Job Family	RSRCH	Visa Expiration Dt	
Survey Salary		Other Job Rec #s	1 2 3	Visa Type	
Grade/Band	25				

II.

Eff Dt	Action	Reason	Position	Position Name	Dept	Dept Name	Bldg/Rm
9/1/05	Empl. Dist.	JED	5555	Senior Research Asso	051255	Center on Aging	13601GENRL

Reports To	Job Code	Reg/Temp	Full/PT	Empl Class	Std Hrs	FTE	Paygroup	FICA
323	252910	Temporary	Full-Time	A-Admin	35.00	1.00	MON	N

Comp Rate	Comp Freq	Pct Chg	Emp Wrk	Pds/Yr	Benefits Base Rt	Annual Budget Amt	Annual Adjust Amt
5000	M		Monthly	12	60,000		

Probn Rv Dt	Last Dt Work	Exp Return	Service Date	Ben Eff Dt	Ben Pgm	Description
02/08/2006	05/31/2006		08/08/2005	08/08/2005	BC1	Basic Benefits Program

III.

Dept ID	Fund	Fund Source	Account	Seq#	Project	Program	Earn Code	Budget Amount	Rate Amount	Percent	Start Date	Stop Date
051255	500	12040	51100	G001	5000719	00000	MRG	42,750	4750	95%	9/1/05	5/31/06
051255	120	10000	51100	G002	5000719	12345	MRB	2,250	250	5%	9/1/05	5/31/06

IV. Authorizing Signatures

 Department Dean Ext. 2-2063 Date 11/1/05	Executive VP Date
 Restricted Ledgers Ext. 4978 Date 11/3/05	Other Ext. Date
 Employment Area Ext. 2473 Date 11/1/05	HRSC Position Administrator Date

Processed in HRSC by _____ Date _____

Dept ID - will be the same
 Fund - 120
 Fund Source - 10000
 Seq # - will be different from fund 500
 Project - will be the same
 Program - will be the assigned program number and will be different from fund 500

Tracking Mandatory Cost Sharing in PeopleSoft Grants

Note: The HR system should generate a sequence number for cost sharing. Communication will have to go out to users informing them of the different chartstrings (fund, program and function) associated with cost sharing.

OSP reviews and approves and then forwards to HRSC for processing.

If Employee Change Request (ECR) is submitted after salary charges have been incurred, OSP generates a journal to adjust the charges and then forwards journal to HRSC for processing.

Example of Journal

JOURNAL #	000044						
DATE	3/8/2006						
Labor Redistrib.	EAGLE ID	NAME	POSN #	HR ACCOUNT CODE	PROJECT ID	AMOUNT	COMMENT
From:	68667625	Soto, Mauricio	5555	57481-500-12040-53330G002	5000674	(1,160.00)	02/06&03/06 cost sharing re-distrib.
To:	68667625	Soto, Mauricio	5555	57481-120-10000-53330G001	5000674	1,160.00	02/06&03/06 cost sharing re-distrib.