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Cost Sharing & Coeus Proposal Development

**What is cost sharing in relation to Coeus?**

Cost sharing is when the university is picking up part of the cost of a sponsored research project.
- Mandatory cost sharing (required by sponsor) must be included in the Coeus budget.
- Voluntary cost sharing (not required by the sponsor):
  - If it is not specific amounts/percentages, it cannot be included in the Coeus budget.
  - If it is specific amounts/percentages, it must be included in the Coeus budget.
- For personnel, cost sharing includes benefits
- Cost sharing commitment forms and letters must be uploaded in the Coeus narrative as type cost sharing.

The directions in this manual apply to cost sharing and how it relates to the Coeus Proposal Development module at the proposal stage. Documentation with more information about cost sharing is available at:
- Cost Sharing Business Process Quick Guide
- Cost Sharing Business Process Detailed Guide

For help or questions about cost sharing in general, please contact your GCA.

**Cost Sharing Commitment Letters/Commitment Forms**

- Upload cost sharing commitment letters or signed commitment forms as applicable for each dept contributing cost sharing in the Coeus narrative section as type “Cost Sharing”
**Cost Sharing Budget**

NOTE: Coeus will automatically calculate OH on cost sharing items regardless of if the sponsor allows OH to count toward the university’s cost sharing commitment. If your sponsor does not allow OH on cost sharing to count toward the University’s commitment, you can either 1) leave it and distribute the OH to unit 51701 (ORPA’s unit #), or 2) create a proposal hierarchy, with one proposal at the sponsor’s OH rate with all "cost to sponsor" items, and a second proposal at 0% OH with $0 “cost to sponsor” but with all “cost sharing” items filled in. The second method will definitely NOT generate OH on cost sharing items.

Entering cost sharing for personnel using the red baron

![Diagram showing steps: 1. Click on the Running Guy, 2. Enter the Calc Base salary for that person as of the Eff Date, 3. Click OK]
Click on the Red Baron

Select the cost element

Press Add

Select the person

Click OK
In the above example, the “cost to sponsor” is $45,600 and the University is picking up $45,600 in cost sharing. The total cost of salary for this item is $91,200.

**Entering cost sharing for personnel without using the red baron**
In the above example, the "cost to sponsor" is $5,000 and the amount the University is picking up is $2,500. The total cost of this item is $7,500.

**Entering cost sharing for non-personnel costs**

1. Click Add
2. Select the cost element
In the above example, the “cost to sponsor” is $5,000 and the amount the University is picking up is $5,000. The total cost of this item is $10,000.

**Viewing cost sharing**

![Budget Line Item Detail](image)

Double click on the line item. The Budget - Line Item Detail box appears.

Fill in the cost to sponsor in the Cost box. Fill in the Cost Sharing amount in the Cost Sharing Box. Click OK.

In the above example, the “cost to sponsor” is $5,000 and the amount the University is picking up is $5,000. The total cost of this item is $10,000.

There is cost sharing in this budget period because there is a value in the cost share box at the top of the screen. But how can you tell which line items have cost sharing?
Because the “start date” and “end date” columns on the Customize View screen were unchecked, there is now space to see the cost sharing column on the screen. (Otherwise, the horizontal scrollbar appears and you either scroll to the right to see the cost sharing column, or move the column dividers over to the left to squish all columns so that the cost share column can be seen without scrolling.)

The bottom of the screen shows OH and EB (if applicable) for the yellow highlighted line.
NOTE: You will have to repeat those steps to see the cost sharing column in each period. Also once you close the budget and reopen it, the screen will return to the default view.

NOTE: Coeus will automatically calculate OH on cost sharing items regardless of if the sponsor allows OH to count toward the university’s cost sharing commitment. If your sponsor does not allow OH on cost sharing to count toward the University’s commitment, you can either 1) leave it and distribute the OH to unit 51701 (ORPA’s unit #) in the Cost Sharing Distribution screen, or 2) create a proposal hierarchy, with one proposal at the sponsor’s OH rate with all “cost to sponsor” items, and a second proposal at 0% OH with $0 “cost to sponsor” but with all “cost sharing” items filled in. The second method will definitely NOT generate OH on cost sharing items. Either way, do not uncheck the “Apply” box as that will generate positive underrecovery and Coeus won’t allow you to submit a proposal with positive underrecovery.

Distributing cost sharing

You must know which dept number is picking up the cost sharing amounts for the Coeus Cost Sharing Distribution screen and for the Cost Sharing Commitment Form. The dept picking up the cost sharing is also known as the source of the cost sharing.

<table>
<thead>
<tr>
<th>Cost Sharing Type/Source</th>
<th>Dept</th>
</tr>
</thead>
<tbody>
<tr>
<td>Graduate School Tuition subsidy (if sponsor is paying full 62% OH rate and allows this subsidy to count towards the university’s cost sharing commitment)</td>
<td>40000</td>
</tr>
<tr>
<td>DFR</td>
<td>51700</td>
</tr>
<tr>
<td>Provost Science funds</td>
<td>51005</td>
</tr>
<tr>
<td>SEAS Science Funds</td>
<td>25000</td>
</tr>
<tr>
<td>OH*</td>
<td>51701</td>
</tr>
<tr>
<td>Faculty AY S&amp;B</td>
<td></td>
</tr>
<tr>
<td>Dept Funds</td>
<td></td>
</tr>
</tbody>
</table>

*NOTE: Coeus calculates OH automatically on cost shared items, even if the sponsor does not allow OH to count toward the University’s cost sharing commitment. Either way, distribute the OH to 51701 (ORPA). If you do not want OH calculated on cost sharing items, follow the instructions in the note above.

*NOTE:  Coeus calculates OH automatically on cost shared items, even if the sponsor does not allow OH to count toward the University’s cost sharing commitment. Either way, distribute the OH to 51701 (ORPA). If you do not want OH calculated on cost sharing items, follow the instructions in the note above.
Simple cost sharing case: Only One Dept involved and no overhead

-10-

Percentage is not used at Princeton.
Simple cost sharing case: Only One Dept involved and there is overhead

1. Click Add
2. Enter the amount of the OH for this FY on the new row. Enter 51701 as the Source Account.
3. Reduce the Amount here by the amt of the OH. Enter the Unit # picking up this cost sharing.

Repeat for each FY & Click OK
More complicated cost sharing case: Multiple units contributing cost sharing, and there is OH

Cost sharing only in the first year of the budget

Add a row for each dept contributing cost sharing for that FY. Update or add amounts for each contributing dept, and enter the dept # in the Source Account box. Repeat for each FY.

Click OK

Cost sharing only in year 1? Enter the dept # picking up the cost sharing in the source acct box.

Then highlight the $0 rows and click on the delete button to delete the $0 rows.

Coeus will not let you click OK until you delete the $0 rows.
Cost sharing distribution problems & tips

The cost sharing distribution screen can get complicated pretty quickly. Tips:

Initially distribute all years to ONE unit, and click OK. Then distribute year by year, clicking OK after each year’s distribution. That way, if you get this error message, you’ll know which rows need adjusting: “Please check amount, the total amount from the distribution list should be equal to $X”:

If you are really stuck, you can always delete all lines in the cost sharing distribution screen, click ok, and start your distribution over.

Cost sharing distribution / marking budget as final and complete bug

After distributing cost sharing, clicking OK and saving, you’re ready to mark your budget final and complete. If the budget isn’t already marked as final, mark it as final. Then, change the budget status from Incomplete to Complete and Save. Sometimes Coeus will tell you to distribute the budget even though you already distributed the budget. In that case, mark the budget as incomplete, save, and exit the budget. Then open the budget again and select Complete on the “Select Budget” screen (instead of the Budget Summary tab) and then click OK. Coeus will then finally mark the budget as Complete.
Select Budget

Proposal Number: 00024854
Sponsor: 000811: National Endowment for the Arts

<table>
<thead>
<tr>
<th>Version</th>
<th>Start Date</th>
<th>End Date</th>
<th>Total Cost</th>
<th>Final</th>
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<tbody>
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<td>30 Jun 2020</td>
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<tr>
<td>2</td>
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<td>31 Oct 2027</td>
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<td>5</td>
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<tr>
<td>6</td>
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<td>31 Aug 2021</td>
<td>$31,198.61</td>
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Budget Status: Complete

Direct Cost: $343,584.52  Underrecovery: $0.00
Indirect Cost: $197,539.27  Residual Funds: $0.00
Cost Sharing: $26,580.00  OH Rate Type: MTDC
Comments:

Last Updated: 24-Apr-2018 04:12:35 PM  Updated User: Burkhardt, Kyle D