Overview

The GMAS Cost Sharing form is used to document cost sharing over the life of an award for which Cost Sharing is proposed or committed. The Cost Sharing Form is generated in GMAS when the response to the question “Does this request include any Cost Sharing?” is set to “Yes” as part of the proposal process. A “Yes” response to this question also generates the GMAS Cost Sharing Approval. Once the proposal has been locked and routed, cost sharing is approved as part of the overall proposal review and approval process. If changes need to be made to cost sharing after submission, a new cost sharing form is generated via the GMAS Cost Sharing Request, and the cost sharing approval status is reset.

This job aid focuses on the review of the cost sharing form by the Office for Sponsored Programs (OSP) and HMS & HSPH Office of Research Administration (ORA) Central Administrators.

Roles & Responsibilities

Office for Sponsored Programs (OSP) and HMS/HSPH Office of Research Administration (ORA) Central Administrator – Responsible for reviewing the cost sharing form at proposal, upon receipt of the award notice, at submission of a cost sharing request, or at any other point in the award life cycle when there is potential for changes to be made to the cost sharing commitment or a need to confirm the commitment. Central Administrators sign all proposals/requests.

GMAS Instructions

First, it is important to understand the cost sharing approval statuses and how they move from state to state:

Table 1

<table>
<thead>
<tr>
<th>Status</th>
<th>Definition</th>
<th>Generated by</th>
<th>Updates To</th>
<th>Updated By</th>
</tr>
</thead>
<tbody>
<tr>
<td>Needed</td>
<td>The cost sharing form needs to be completed and approved</td>
<td>• Responding “Yes” to the cost sharing question on the segment for the first time in an Initial/Renewal proposal, continuation, supplement, or segment revision</td>
<td>Done</td>
<td>Proposal or request is authorized or submitted to sponsor</td>
</tr>
</tbody>
</table>
I. Viewing the Current Cost Sharing Form in GMAS

There are two different ways to view the current cost sharing form in GMAS:

1. Cost Sharing Approval Screen – displays the most recent cost sharing form
2. View Cost Sharing Form Screen – displays the cost sharing form associated with a specific request

If reviewing the most recent request that has a cost sharing form associated with it, either view will display the same current version. But if reviewing a previously submitted proposal that included cost sharing, and there have been two versions of the cost sharing form submitted after the awarding of that proposal, the View Cost Sharing form screen will display cost sharing as it was in the previously submitted proposal. The cost sharing approval will display the 3rd (current) version of the cost sharing form.
Reviewing the GMAS Cost Sharing Form – Central Administrator

GMAS User Role:

Last Updated: 04/21/2020

GMAS Release: Scheduled for 04/24/2020

II Review of Cost Sharing at Lock & Route

When a proposal or request with cost sharing is locked and routed, the cost sharing approval status is “Needed”.

The central administrator will review the proposal/request, including the cost sharing form. When all required signatories on the proposal have signed, or when the proposal has been submitted to sponsor (whichever comes first) the approval status will update to “Done”.

To facilitate this review, select “Proposed Cost Sharing” from the Proposal homepage

Information Displayed on the View Cost Sharing Screen

1. **Generated by**: Identifies whether the cost sharing form was generated by an Initial or Competing Renewal Proposal, a cost sharing request, or a continuation or supplemental request. Click on the link to view the proposal or request that generated the cost sharing form.

2. **Status**: Displays the current status of the cost sharing approval, what action updated the status, and who completed the action if applicable. At this stage, it will be set to “Needed”

3. **Type & Source(s)** of cost sharing included on the form

4. If more than five periods are included on the proposal, click on the right arrow to view additional budget periods.

Figure 1

![Proposal information table]

<table>
<thead>
<tr>
<th>Proposal information</th>
<th>Basic research and all other</th>
</tr>
</thead>
<tbody>
<tr>
<td>Proposed dates and dollars</td>
<td>Mar 19, 2020 - Mar 18, 2021</td>
</tr>
<tr>
<td>Approvals</td>
<td>2 total</td>
</tr>
<tr>
<td>Proposed cost sharing</td>
<td>Mandatory committed cost sharing</td>
</tr>
</tbody>
</table>

School specific information

1 question answered “No” | Show all

Figure 2

![Cost sharing form]

<table>
<thead>
<tr>
<th>Period 1</th>
<th>Period 2</th>
<th>Period 3</th>
<th>Period 4</th>
<th>Period 5—</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>$15,000</td>
<td>$10,000</td>
<td>$5,000</td>
<td>$10,000</td>
<td>$15,000</td>
<td>$50,000</td>
</tr>
</tbody>
</table>
University/School Contributions

1. For Non-companion accounts, the components of the account string displayed is based on input of department administrator. X’s will display in place of account values that were not identified during form entry.

2. For Companion accounts, the account to which the companion account is related is displayed and is a link to the account details. The non-sponsored fund entered by the department administrator is displayed.

3. If salary is being cost shared, effort in person months must also be entered. Salary dollars should tie to the effort entered per period. Fringe benefits may apply to salary dollars, and should be reflected as a separate line item with the fringe category assigned.

Sponsored Contributions

1. The Sponsored project Fund ID or Project ID links to the project providing the funds for cost sharing. Note: If the related project is in an org to which the user does not have security to view, the Fund or Project ID will be displayed, but will not function as a link to the project.

2. If the Sponsored project Fund or Project ID was unknown at proposal submission, TBD will be displayed.
   a. The related Fund or Project ID should be added at award or as soon as the identity is determined.
Subrecipient Committed Cost Sharing

1. The subagreement # displayed is a link to that subagreement.
   a. The list of available subagreements to choose from is based on the subagreements set up and associated to the proposal. Therefore, departments should be advised to set up the subagreements prior to entering details in the cost sharing form.

In-kind Cost Sharing

1. Source and Description are required fields.
2. Dollar values entered must represent the fair market value of the goods or services provided.

Other Cost Sharing

For any other proposed cost sharing commitments not included in the categories above, the source, dollar amount per budget period, and description of these “other” cost sharing commitments are displayed. Any amounts entered in this section should be reviewed by the school or central administrator to confirm that they are not more properly classified as one of the cost sharing sources defined above.
Cost Sharing Document Repository
The cost sharing document repository may be accessed from the View cost sharing form screen, the Cost sharing approval and the Cost sharing request homepage. Documents: click to view all uploaded documents

1. Upload: Click to upload additional documents. For more information about document repositories, see the “Document repository job aid”

Refer to Appendix A in the University Cost Sharing Procedures to identify what types of documentation should be uploaded at each phase of the project life cycle in support of the cost sharing commitment.

The Cost sharing repository is shared among the three views, meaning that for example, a document uploaded from the cost sharing approval will be visible from a cost sharing request when one is created. Central Administrators should consider locking documents upon review to protect against accidental deletion of a document.

III Review of Cost Sharing at Award
When the first notice is logged in GMAS on an initial or competing renewal proposal with Cost Sharing, GMAS sets the approval status of the cost sharing form to “Needs Review”.

1. An automated email with a link to the cost sharing approval will be sent to the department administrator asking them to review the cost sharing form
2. The department administrator will either:
   a. Confirm that the cost sharing form is current and from the “Actions” dropdown, select “Confirm current version of form” which resets the cost sharing approval status back to “Done”.
      i. The central administrator can then proceed to request the GMAS revision be processed to award the funding in GMAS
Reviewing the GMAS Cost Sharing Form – Central Administrator

GMAS User Role: 

Last Updated: 04/21/2020

GMAS Release: Scheduled for 04/24/2020

1. Determine that the cost sharing form should be updated and select “Create new version of the form” which generates a cost sharing request and sets the Cost sharing approval to “Needed”. See the Completing a GMAS Cost Sharing Request job aid for details.

   i. The central administrator will review and approve the new cost sharing request and ensure that the notice is associated to the cost sharing request in addition to the initial or competing renewal proposal. Then the GMAS revision will be completed to award the funding with the updated cost sharing amount.

IV Review of Cost Sharing Initiated by Central Administrator

During the life of the award, there may be instances when the Central Administrator wants the department administrator to review the cost sharing commitment.

To facilitate this review, from the Segment homepage, the Central Administrator will select “Approvals”. From the Approvals screen, select “Cost Sharing”, and the most recent cost sharing form is displayed.

All detailed fields displayed on the Cost Sharing Approval are the same as those displayed on the View cost sharing screen described above. However, the Cost Sharing approval screen also includes the “Actions” button and “All forms versions”

To request that the department administrator review the cost sharing form, the Central Administrator will:

1. Click on the “Actions” button
2. Select “Form needs departmental review”

The status of the approval is updated to “Needs Review” and an automated email is sent to the department administrator with a link to the cost sharing approval. The department administrator will review and respond as described in Section III above.
All Form Versions
On the Cost Sharing Approval screen, a listing of all prior versions of cost sharing forms associated with the segment is displayed.

1. Total number of forms associated with the segment
2. Link to the cost sharing form that also identifies the proposal or request that generated the form
3. Date the cost sharing form was generated
4. Total dollar amount of the committed cost sharing per the form

Figure 10

Other Resources
Below are links to other documents related to Cost Sharing at Harvard University

Cost Sharing Policy

University Cost Sharing Procedures

Cost Sharing FAQ

Job Aids
Completing the Cost Sharing Form at Proposal

Completing a Cost Sharing Request

Reviewing Cost Sharing – Department Administrator