

## 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

Status	Definition	Generated by	Updates To	Updated By
Needed	The cost sharing form needs to be completed and approved	<ul style="list-style-type: none"><li>Responding “Yes” to the cost sharing question on the segment for the first time in an Initial/Renewal proposal, continuation, supplement, or segment revision</li></ul>	Done	Proposal or request is authorized or submitted to sponsor

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Status	Definition	Generated by	Updates To	Updated By
		<ul style="list-style-type: none"> <li>Cost Sharing request is created</li> </ul>		
Done	The cost sharing form has been completed & approved	<ul style="list-style-type: none"> <li>Associated request to the form moves to authorized or submitted to sponsor</li> <li>Current version of form is marked as “confirmed” by the department administrator</li> </ul>	Needed	Cost Sharing request is created
			Needs Review	<ul style="list-style-type: none"> <li>First notice associated to Initial/Renewal is logged</li> <li>Cost Sharing question on continuation or supplement is answered “Yes”</li> <li>Central Administrator flags the approval for review</li> </ul>
Needs Review	The cost sharing form needs to be reviewed by the Department Administrator to confirm it is up to date or to update it	<ul style="list-style-type: none"> <li>First notice associated to Initial/Renewal is logged</li> <li>Cost Sharing question on continuation or supplement is answered “Yes”</li> <li>Central Administrator flags the approval for review</li> </ul>	Done	<ul style="list-style-type: none"> <li>Current version of form is marked as “confirmed” by the department administrator</li> </ul>
			Needed	<ul style="list-style-type: none"> <li>Cost Sharing request is created</li> </ul>

## 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 3<sup>rd</sup> (current) version of the cost sharing form.

Figure 1

<b>Proposal information</b>	Basic research and all other		<a href="#">Edit</a>	+
<b>Proposed dates and dollars</b>	Mar 19, 2020 - Mar 18, 2021	\$17,000	<a href="#">Edit budget</a>	<a href="#">Edit dates</a>
<b>Approvals</b> 1	2 total	0 needed	1 attributes apply	
<b>Proposed cost sharing</b> 2	Mandatory committed cost sharing	\$333	<a href="#">Edit</a>	
<b>School specific information</b>				<a href="#">Edit</a>
1 question answered "No"   <a href="#">Show all</a>				

## 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

- 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.
- 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”**
- Type & Source(s)** of cost sharing included on the form
- If more than five periods are included on the proposal, click on the right arrow to view additional budget periods.
- Edit:** Select this action button to update or complete the cost sharing form.

Figure 2

<b>Cost sharing form</b>		<a href="#">Comments (0)</a>		<a href="#">Related links</a>		<a href="#">i</a> 5		<a href="#">Edit</a>
Generated by <a href="#">Initial proposal 6395635</a> 1								
Last updated by <a href="#">Oscar Romero Gonzalez</a> on Aug 4, 2020 8:42 AM 2								
Type <a href="#">Mandatory committed cost sharing</a> 3								
Source(s) <a href="#">Sponsored contributions (matching funds)</a>								
	<b>Period 1</b> Jul 20, 2020 - Jul 19, 2021	<b>Period 2</b> Jul 20, 2021 - Jul 19, 2022	<b>Period 3</b> Jul 20, 2022 - Jul 19, 2023	<b>Period 4</b> Jul 20, 2023 - Jul 19, 2024	<b>Period 5</b> → Jul 20, 2024 - Jul 19, 2025	<b>4 Total</b> (8 periods) Jul 20, 2020 - Jul 19, 2028		

*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.

Figure 3

University/School contributions									
Account 31215 345678.xxxxxx.xxxx.xxxx 1									\$1,338,200
Category	Salaries	Object	6120	\$94,678	\$8,092	\$14,190	\$92,461	\$86,480	\$295,901
Comment	Summer REU								
		Effort in person months		7.00	7.00	7.00	7.00	7.00	
Category	Fringe Benefits	Object	6300	\$15,067	\$14,843	\$20,020	\$95,396	\$64,468	\$209,794
Category	Indirect Costs			\$350,670	\$25,175	\$98,139	\$32,201	\$75,718	\$581,903
Comment	IDC CS allowed								
Category	Equipment			\$61,602	\$15,656	\$64,185	\$24,651	\$84,508	\$250,602
Companion account to Main Y3 Org 31215 Fund 345678 2									\$505,695
Category	Salaries			\$94,678	\$8,092	\$14,190	\$92,461	\$86,480	\$295,901
Comment	Summer REU								
		3 Effort in person months		7.00	7.00	7.00	7.00	7.00	
Category	Fringe Benefits	Object	6300	\$15,067	\$14,843	\$20,020	\$95,396	\$64,468	\$209,794

*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.

Figure 4

Sponsored contributions							
<b>Fund 116533</b>	\$51,675	\$65,375	\$34,468	\$95,167	\$10,715		\$450,430
Comment - this is a funded project with a fundid							
<b>Project 7700926-01</b>	\$45,930	\$1,662	\$59,346	\$75,652	\$14,875		\$454,070
Comment - this segment doesn't have a fund							
<b>TBD</b>	\$45,930	\$1,662	\$59,346	\$75,652	\$14,875		\$454,070
Comment - this one is TBD							
<b>Total sponsored contributions</b>	<b>\$143,535</b>	<b>\$68,699</b>	<b>\$153,160</b>	<b>\$246,471</b>	<b>\$40,465</b>		<b>\$1,358,570</b>

*Subrecipient Committed Cost Sharing*

- The **subagreement #** displayed is a link to that subagreement.
  - 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.

Figure 5

Subrecipient cost sharing							
<b>5116120 - Beth Israel Hospital</b>	\$18,419	\$17,095	\$84,596	\$607	\$25,036		\$266,063
Required flow down of terms							
<b>5104172 - General Biologics</b>	\$92,007	\$10,061	\$41,316	\$35,477	\$53,819		\$466,157
Test second Line							
<b>Total subrecipient cost sharing</b>	<b>\$110,426</b>	<b>\$27,156</b>	<b>\$125,912</b>	<b>\$36,084</b>	<b>\$78,855</b>		<b>\$732,220</b>

*In-kind Cost Sharing*

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

Figure 6

In-kind cost sharing							
<b>Chiquita</b>	\$30,113	\$63,400	\$6,334	\$25,490	\$6,300		\$213,271
Banana's for study							
<b>Test</b>	\$79,331	\$3,866	\$42,718	\$42,520	\$37,933		\$375,382
Test study							
<b>Total in-kind cost sharing</b>	<b>\$109,444</b>	<b>\$67,266</b>	<b>\$49,052</b>	<b>\$68,010</b>	<b>\$44,233</b>		<b>\$588,653</b>

*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.

Figure 7

Other							Add source
Source	<input type="text"/>	\$0	\$0	\$0	\$0	\$0	\$0
Comment	<input type="text"/>						
	Optional						
Total other cost sharing		\$0	\$0	\$0	\$0	\$0	\$0

### 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”](#)

Figure 8

Documents	1	5 Documents	2	Upload	+

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

- b. 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.

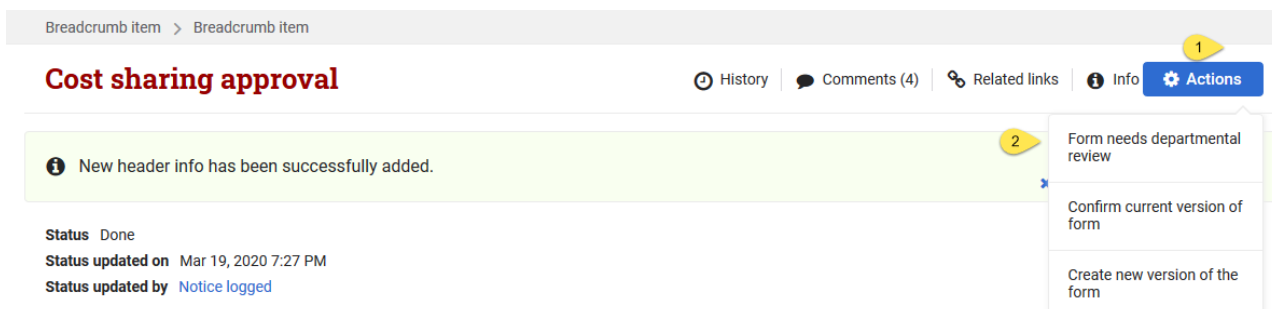
To facilitate this review, from the Segment homepage, the Central Administrator will select **“Approvals”**. From the Approvals screen, select **“Cost Sharing”**, and the most recent cost sharing form is displayed.

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”**

Figure 9



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

The screenshot shows a table titled 'All form versions' with a sub-header '2 form versions' and a collapse icon. The table has five columns: Number, Form request, Generation date, Cost sharing amount, and a link column. There are two rows of data. Yellow callout bubbles are placed over specific elements: '1' over the version count, '2' over the 'Form request' link, '3' over the 'Generation date', and '4' over the 'Cost sharing amount'.

All form versions				
2 form versions				
Number	Form request	Generation date	Cost sharing amount	
2	<a href="#">Cost sharing request 6875234</a>	Jul 27, 2019	\$11,100	<a href="#">Form download</a>
1	<a href="#">Cost sharing request 5732897</a>	May 20, 2019	\$11,100	<a href="#">Form download</a>

### 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](#)

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