



Revised PTA Setup Form (for new PTA)

CIT PTA Setup  



ORACLE
Applications

CIT PTA Setup


*** Indicates required field** [Tracking Status and Changes](#)

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Processing Area* GB AUXI GIFT ENDOW SPONSORED PLANT FUND

PTA Start Date* (DD-MON-YYYY)  **PTA End Date*** (DD-MON-YYYY) 

Fabrication* Yes No **Fabrication Type*** Building Land Improvement Equipment

Funding Source Name* New Customer  **Funding Source Award Number**

Title of Proposal or Purpose of Contribution **Proposal Number**

PI Name*  **Organization*** 


Project Number* **Task Number***

Award Number* Pre-Award **Next sequential number**

Project Name* **Project Description**

Task Name* **Task Description**



Award Short Name* **Award Full Name*** Or, please use Title of Proposal

Payroll Certification Coordinator (required if federally sponsored award) 

For Type of GIFT/ENDOWMENT Account ONLY Select one of the following
 Individual Discretionary Individual Restricted Division Restricted Division Discretionary

Comments (Maximum 250 characters)

Revised Project Setup Form (for new Project on existing award)

CIT Project Setup  



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INITIAL PROJECT SETUP REQUEST FORM


[Tracking Status and Changes](#)



* Indicates required field

Processing Area* GB AUXI GIFT ENDOW SPONSORED PLANT FUND

Start Date* (DD-MON-YYYY) 01-APR-2009  **Completion Date*** (DD-MON-YYYY) 31-DEC-2015 

Fabrication Yes No **Fabrication Type*** Building Land Improvement Equipment

Project Number* LIN.TEST **Existing Award Number** NSF.PDAEQUIP1 


Project Manager* Baltimore, David  **Organization*** BioEngineering 

Project Name* FOR DEMO **Project Description** for demo

Task Number* 1 **Task Name*** 1

Task Description demo task

Comments (Maximum 2000 characters) for demo only



Administrative Contact
Name* Westcott, Samantha J (Sam)  **Email Address** westcott@caltech.edu **Phone** 626-395-8823

Other Personnel

Data Warehouse Access

PDF REPORTS (FACULTY PTAs ONLY) Yes No

New Equipment Fabrication Form


CIT PTA Setup  


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EQUIPMENT FABRICATION

* Indicates required field † Indicates conditionally required field

Please complete the form, save, print and submit the PTA setup online. If you need assistance completing this form, contact Property Services at ext.4181.
Obtain the PI signature on the print-out form. Send the signed print-out form to Property Services - Mail Code 103-6.
Routing: 1) Fabrications under sponsored awards - Final approval by OSR.
Routing: 2) Fabrications under non-sponsored awards - Final approval by Gift Accounting.

† Main Project Number 

† Main Task Number 

† Main Award Number 

Main PTA is required if you are requesting an equipment fabrication PTA for a current award. Leave blank if for a new award.

* Fabrication Name

* Description of Fabricated Equipment

* Was the fabrication included in the proposal budget/narrative? Yes No

Budgeted Allowable Costs for the fabrication Total (\$)

* Salaries (\$) * Materials and Supplies (\$)
* Travel (\$) * Other (\$)

* Is an exception to Caltech's Fabrication Policy being requested? Yes No

* Fabrication Ownership CALTECH GOVERNMENT OTHER

If Govt or Other owned, please answer the following questions a, b and c; if Caltech owned, skip questions a, b, and c:


† (a) Will the asset be located at a Caltech site? Yes No
(If No is selected, please answer questions b and c; If Yes, skip questions b and c)

† (b) Will Caltech researchers have continued access to the asset for future research? Yes No

† (c) Is the item being fabricated space hardware? Yes No

* Final Location when placed in service On-Campus Off-Campus

* Building/Site Name
Room Number

* Estimated placed-in-service date  (DD-MON-YYYY, must be after award and project start date)

* Can the fabrication be tagged? Yes No

* Will the fabrication be affixed to a building or structure? Yes No

* Will the fabrication have a useful life of two or more years? Yes No

* Fabrication Contact 