

1. From the Budgets tab on the proposal workspace, click the name of the sponsor budget that will include cost-sharing.

BudgetsSF424 SummaryHistoryReviewersAttachmentsFinancialsReviewer Notes

Working Budgets

| Name                                                                                                          | SmartForm | Date Modified      |
|---------------------------------------------------------------------------------------------------------------|-----------|--------------------|
|  NATIONAL INSTITUTES OF HEALTH | [Edit]    | 12/20/2024 9:38 AM |

1 items

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2. On the budget workspace, click Create Cost Share.

Next Steps

Edit Budget

Printer Version

Create Subaward

Create Cost Share

3. On the Cost Share Information page, enter the cost sharing organization’s name, then click it from the list of matches.

Cost Share Information

Creating New: Budget

Cost Share Information

1. Cost Share entities:

+ Add

2. Who will provide funding:

a. If you cannot find the organization in the list above, enter its name here:

4. Enter the Cost Share Information:

**Note:** Select if the cost share is funded by Caltech or a Third Party and enter the funding source.

- Select the cost share type:
  - Mandatory: required by the sponsor
  - Voluntary Committed: a voluntary but binding commitment

Enter the cost share amount.  
Click OK.

1 Cost Share Information

1. \* Is this cost share funded by Caltech or a third party?

☐ Caltech

☐ Third Party

Clear

2. Who will provide funding:

a. If you cannot find the organization in the list above, enter its name here:

3. \* Cost Share Type:

☐ Mandatory

☐ Voluntary Committed

Clear

4. \* Amount:

5. Description:

2

OK

OK and Add Another

Cancel

5. Click Continue or Save.

**Note:** The system creates a cost share budget and lists it on the budgets tab of the proposal workspace. If the salaries exceed the salary cap, or any effort percentages exceed the corresponding salary percentages, the system automatically populates the cost share budget you’ve created with the difference.

✕ Exit

 Save

Continue →

6. Complete the other pages of the cost share budget as you would for a primary budget.

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