1. **Project Title**
2. **Award Number**
3. **Award Total**



1. **Organization: Financial/HR Unit**
2. **Project Start Date**
3. **Project End Date**



1. ***Final Close Date Includes Sponsor’s Required Close Out Period:***
	1. ***State: 90 days***
	2. ***Federal: 120 days***
	3. ***UC: 45 days***
	4. ***Local or Private: 90 days***
	5. ***Or as defined by agreement***
2. **Task Number-**
	1. **The below list of the COA Function Segment align with the descriptor in this value.**
	2. **Example: Research CAP (PI Initials), Research (PI Initials)**
	3. **See examples provided on New Project Request Template for project specific tasks.**

|  |
| --- |
| **New COA - Function Segment Values** |
| 00 | DEFAULT FUNCTION |
| 40 | INSTRUCTION |
| 41 | SUMMER SESSION |
| 42 | TEACHING HOSPITALS |
| 43 | ACADEMIC SUPPORT |
| 44 | RESEARCH |
| 60 | LIBRARIES |
| 61 | UNIVERSITY EXTENSION |
| 62 | PUBLIC SERVICE |
| 64 | OPERATIONS & MNTNCE OF PLANT |
| 68 | STUDENT SERVICES |
| 72 | INSTITU SUPPORT&GENERAL ADMIN |
| 76 | AUXILIARY ENTERPRISES |
| 78 | STUDENT FINANCIAL AID |
| 79 | DEPARTMENT OF ENERGY LAB |
| 80 | PROVISIONS FOR ALLOCATION |

1. **Task Name-**
2. **PI Name needs to be tied to item 8(a) above. See Excel template for examples**

|  |
| --- |
| **New COA - Function Segment Values** |
| 00 | DEFAULT FUNCTION |
| 40 | INSTRUCTION |
| 41 | SUMMER SESSION |
| 42 | TEACHING HOSPITALS |
| 43 | ACADEMIC SUPPORT |
| 44 | RESEARCH |
| 60 | LIBRARIES |
| 61 | UNIVERSITY EXTENSION |
| 62 | PUBLIC SERVICE |
| 64 | OPERATIONS & MNTNCE OF PLANT |
| 68 | STUDENT SERVICES |
| 72 | INSTITU SUPPORT&GENERAL ADMIN |
| 76 | AUXILIARY ENTERPRISES |
| 78 | STUDENT FINANCIAL AID |
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1. **Planned Start Date- If planned start date is different than period of performance.**
	1. **Pre-Award Spending Authorization form is required and to be submitted with New Project Request Set-Up in ServiceNow.**
2. **Planned End Date – If different than period of performance**
3. **Billable – If task is required to bill. ‘Y’ or ‘N’**
4. **Capitalizable – To identify purchases or costs to transfer to Assets.**
5. **Fund - Reference Fund Segment Values - D Level Value**
	1. **Sponsored Funds available below**

|  |
| --- |
| **New COA - Fund Segment Values** |
| ***D Level Value*** | ***Oracle Description*** |
| 20000 | FEDERAL CONTRACTS |
| 20001 | FEDERAL GRANTS |
| 20014 | DEPT OF HEALTH&HUMAN SERVICES |
| 20015 | NATIONAL INSTITUTE OF JUSTICE |
| 20400 | STATE CONTRACTS |
| 20401 | STATE GRANTS |
| 20402 | LOCAL CONTRACTS |
| 20403 | LOCAL GRANTS |
| 20700 | PRIVATE CONTRACTS |
| 20701 | PRIVATE GRANTS |

1. **Function – Reference Account Segment Values – B Level Values**

|  |
| --- |
| **New COA - Function Segment Values** |
| ***B Level Value*** | ***Oracle Description*** |
| 00 | DEFAULT FUNCTION |
| 40 | INSTRUCTION |
| 41 | SUMMER SESSION |
| 42 | TEACHING HOSPITALS |
| 43 | ACADEMIC SUPPORT |
| 44 | RESEARCH |
| 60 | LIBRARIES |
| 61 | UNIVERSITY EXTENSION |
| 62 | PUBLIC SERVICE |
| 64 | OPERATIONS & MNTNCE OF PLANT |
| 68 | STUDENT SERVICES |
| 72 | INSTITU SUPPORT&GENERAL ADMIN |
| 76 | AUXILIARY ENTERPRISES |
| 78 | STUDENT FINANCIAL AID |
| 79 | DEPARTMENT OF ENERGY LAB |
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1. **Program – Reference Account Segment Values**

|  |
| --- |
| **New COA – Program Segment Values** |
| 000 | DEFAULT PROGRAM |
| B01 | SIERRA NEVADA RSRCH INTST |
| B02 | HEALTH SCIENCE RESEARCH INSTIT |

1. **PI Code – For existing PI’s provide the code. For new PI’s generate a ServiceNow ticket and PPFM will create a new PI code.**
	1. **Working on look up tool that will be made available on PPFM Website.**
2. **Primary Sponsor – Awarding Agency**



1. **Award Type – Reference Fund Segment Values – Level D**

|  |
| --- |
| FEDERAL CONTRACTS |
| FEDERAL GRANTS |
| STATE CONTRACTS |
| STATE GRANTS |
| LOCAL CONTRACTS |
| LOCAL GRANTS |
| PRIVATE CONTRACTS |
| PRIVATE GRANTS |

1. **Burden Schedule – Base, Indirect Rate, Reference Award.**
	1. **FA-ONMTDC-55% - On Campus Activity, MTDC base, 55% rate**
	2. **FA-OFFMTDC-26% - Off Campus Activity, MTDC base, 26% rate**
	3. **FA – T – 0% - IDC Waived: Waiver on File**
	4. **Salary & Wages – Compensation paid or accrued by the organization for employees working on the NSF-supported project during the grant period is allowable, in accordance with 2 CFR § 200.430, including Fringe Benefits.**
	5. **TDC – Total Direct Cost, comprised of Salary and Wages, Intra-University Consulting, Federal Employees**
2. **Budget – Based off the Budget of Award**
	1. **Award Number – On the award letter**
	2. **Award Period – Period 1, Period 2 (Year 1, Year 2)**
	3. **Task Number - List of the COA Function Segment align with the descriptor in this value.**
	4. **Fund – Reference Fund Segment D Level**
	5. **Program – Reference Program Segment Values**
	6. **Organization – Fin/HR Unit for Task**
	7. **Year – Fiscal year of this budget**
	8. **Period – Month of this budget**
	9. **Scenario – One time or Recurring**
	10. **Account- Reference Account Segment Values – E Level Values**
	11. **Budget Amount – Dollar amount for each task**