# COP30- Cost Share & COP44- Cost Share Popup

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v. 02.11.2014
Cost Share Main Page:

Summary
Below are some of the main elements of the Cost Share Main page:

Purpose
The purpose of the Cost Share page is to allow the home departments to view and upload Cost Share information. EFM will be allowed to update and upload Cost Share information and will also be able to review any actions that the department did.

The screen consists of a link to the EFM website, a comment section and a place to upload documents.
Screen Group
The Cost Share page can be accessed three ways:

1. User can click on the Fund Details Tab, hover over the Expenditure review sub tab and select Cost Share.

2. User can click on the Fund Details Tab and select Cost Share from the Overview page.
3. User can access the Cost Share page through the link on the Additional Cost Transfers page.

**Screen View**

The Cost Share page is visible to all, if the fund has cost share. The screen consists of a link to download the Cost Share template (green box), a comments section (red box) and an upload section (blue box).

**Cost Share Template**

PAMS will provide a link to the Excel download for users to access the standard Cost Share template.
Cost Share Amounts

PAMS will display the amounts entered in by the user from the Cost Share pop-up page. This field is view only. If the Dept left this Cost Share page empty, EFM can go in this page and enter information. PAMS will enter this amount on certain invoice or report templates that have a field for Cost Share amount.

Remaining Balance:  PAMS will calculate the Total Cost Share Commitment minus Total Cost Share Contribution and display the amount.

Go: User will be taken to the Cost Share pop-up page. The Go button will appear until the user enters the Total Cost Share Commitment and Contribution.

Review: EFM user is taken to Cost Share pop-up page (review mode). Review button will appear if a Dept user enters the Total Cost Share Commitment and Contribution and it needs to be approved. Review button will appear until EFM approves or rejects the Cost Share amount on the Cost Share popup. If EFM clicks the Go button and completes the Total Cost Share Commitment and Contribution Amount, the Review button will not appear (if EFM enters this data, it will act as an approval).
View/Upload Document Icon
When the user completes the Cost Share template (outside of PAMS) the user can upload documents on this page. User can view and upload documents.

Comments
PAMS will display this icon for any comments entered in from the Cost Share pop-up page.

Dependencies
If the Cost Share flag on the Fund Attributes page is “Yes” then the Cost Share page will exist for that fund. If the Cost Share flag in Fund Attributes is “No,” the Cost Share page will not exist for that fund.

Once the Dept uploads a document and enters in an amount for Total Cost Share Commitments and Contributions, the page status will be “Dept Completed.” The status will remain “Dept Review” otherwise.

Once EFM owns the COP and is Reviewing, the page status will be “EFM Review.” If EFM clicks approve, the page status will be “EFM Completed.” If EFM clicks Reject, the page status will be “EFM Rejected.”

Report Generation
The page cannot be sent to Excel.

Page Access
The page is viewable to: Dept Admin, Dept Sr fund Manager, Dept Fund Manager, EFM Director, EFM Supervisor and EFM Fund Manager (if the fund has cost share).

Cost Share Popup:
Purpose
This popup screen allows the home department to add/update and upload Cost Share information. EFM will be allowed to update and upload Cost Share information as well and will also be able to Review any actions that the department did.
Screen Group
The Cost Share popup can only be accessed by clicking the action button on the Cost Share page.

Screen View
The Cost Share popup is available to the Home Department and EFM. It consists of two boxes to input cost share amounts (green), a button to calculate the remaining balance (orange) and a location to input comments (blue).
Notes

Total Cost Share Commitment: Dept enters amount here. This field will be updated onto the main Cost Share page once the “save” button is selected. EFM can enter an amount if the department user left it blank. Otherwise it will be view only.

Total Cost Share Contribution: Dept enters amount here. This field will be updated onto the main Cost Share page once the “save” button is selected. EFM user will be allowed to enter an amount if the Dept user left it blank. Otherwise it will be view only.

Remaining Balance: PAMS will calculate the Total Cost Share Commitment minus Total Cost Share Contribution and display the amount.

Comments: Dept to enter comments here. The field is optional. As EFM reviews this popup, EFM user may also enter comments.

Save: This button will save information entered and display it on the main Cost Share page. If Dept clicks “save” then the main page status will be Dept Completed. If EFM is in “go” mode and clicks “save,” the main page’s status will be EFM Complete. This button will save information entered and display it on the main Cost Share page. If Dept clicks “save” then the main page status will be Dept Completed. If EFM is in “go” mode and clicks “save,” the main page’s status will be EFM Complete.

Cancel: If the user clicks cancel, the popup will close and the user will be directed to the Cost Share main page. No information will be saved.

Dependencies

If the Cost Share flag on the Fund Attributes page is “Yes” then the Cost Share page will exist for that fund. If the Cost Share flag in Fund Attributes is “No,” the Cost Share page will not exist for that fund.

Once the Dept uploads a document and enters in an amount for Total Cost Share Commitments and Contributions, the page status will be “Dept Completed.” The status will remain “Dept Review” otherwise.
Once EFM owns the COP and is Reviewing, the page status will be “EFM Review.” If EFM clicks approve, the page status will be “EFM Completed.” If EFM clicks Reject, the page status will be “EFM Rejected.”

**Report Generation**
The page cannot be sent to Excel.

**Page Access**
The page is viewable to: Dept Admin, Dept Sr fund Manager, Dept Fund Manager, EFM Director, EFM Supervisor and EFM Fund Manager (if the fund has cost share).