

SELECTING THE CORRECT PROJECT TEMPLATE

Use one or more of the following project templates to set up new awards /fabrications starting 05/03/2010:

Revised: September 16, 2011

Template Number	Use this template if	Comments	Subject to A-21	Major Project	Charge Stipends	Unallowables
SP_T_FED_A21_NSTP	<ul style="list-style-type: none"> Federal award or Non-federal award subject to A-21 Award is NOT a major project Stipends are NOT chargeable 	<ul style="list-style-type: none"> Stipends are not chargeable to RESEARCH awards unless specifically budgeted and approved by the sponsor Examples are R01 NIH research grants If capital equipment does not vest with Stanford or is excluded, see Note 1. Excludes fabrication ETs, see Note 2 	Yes	No (Admin charging prohibited)	No	Not Chargeable
SP_T_FED_A21_MJR_PRJ_NSTP	<ul style="list-style-type: none"> Federal award or Non-federal award subject to A-21 Award is a MAJOR project Stipends are NOT chargeable 	<ul style="list-style-type: none"> Stipends are not chargeable to RESEARCH awards unless specifically budgeted and approved by the sponsor <i>Administrative expenses are allowable if meet A-21 & Stanford policy, see Note 7</i> If capital equipment does not vest with Stanford or is excluded, see Note 1. Excludes fabrication ETs, see Note 2 	Yes	Yes	No	Not Chargeable
SP_T_FED_A21	<ul style="list-style-type: none"> Federal award or Non-federal award subject to A-21 Award is NOT a major project Stipends <i>are</i> chargeable 	<ul style="list-style-type: none"> Stipends are not chargeable to RESEARCH awards unless specifically budgeted and approved by sponsor Do not use this template for training grants/fellowships. See SP_T_FED_TRN_FLSHP. If capital equipment does not vest with Stanford or is excluded, see Note 1. Excludes fabrication ETs, see Note 2 	Yes	No (Admin charging prohibited)	Yes	Not Chargeable
SP_T_FED_A21_MJR_PRJ	<ul style="list-style-type: none"> Federal award or Non-federal award subject to A-21 Award is a MAJOR project Stipends are chargeable 	<ul style="list-style-type: none"> Stipends are not chargeable to RESEARCH award unless specifically budgeted and approved by sponsor. NOTE: fellowships or training grants are NOT considered major projects <i>Administrative expenses are allowable if meet A-21 and Stanford policy, see Note 7.</i> If capital equipment does not vest with Stanford or is excluded, see Note 1. Excludes fabrication ETs, see Note 2 	Yes	Yes	Yes	Not Chargeable
SP_T_FED_TRN_FLSHP	<ul style="list-style-type: none"> Fed Training Grant Fed Fellowship 	<ul style="list-style-type: none"> Stipends are allowable Tuition is allowable Usually includes an institutional or administrative allowance 	Yes	Yes	Yes	Not Chargeable
SP_T_STATE_LOCAL_NO_A21	<ul style="list-style-type: none"> State of CA (<i>except CIRM</i>) or other states and local municipalities only 	<ul style="list-style-type: none"> <i>Stipends and administrative expenses are allowable if not prohibited by sponsor.</i> If capital equipment does not vest with Stanford or is excluded, see Note 1. Excludes fabrication ETs, see Note 2. 	No	N/A	N/A	Not Chargeable
SP_T_CIRM_NO_A21	<ul style="list-style-type: none"> State of CA CIRM awards <i>only</i> (California Institute for Regenerative Medicine) 	<ul style="list-style-type: none"> <i>Stipends and administrative expenses are allowable if not prohibited by sponsor.</i> If capital equipment does not vest with Stanford or is excluded, see Note 1. Excludes fabrication ETs, see Note 2. VSC animal care is charged to ET 58720 INTERDEPT VSC FED CIRM ANML CH <i>only</i> 	No	N/A	N/A	Not Chargeable
SP_T_NON_FED_NO_A21	<ul style="list-style-type: none"> Non-federal award excluding State of California, CIRM and other states and local municipalities. University Research award (internally funded) 	<ul style="list-style-type: none"> <i>Stipends and administrative expenses are allowable if not prohibited by sponsor.</i> If capital equipment does not vest with Stanford or is excluded, see Note 1. Excludes fabrication ETs, see Note 2 	No	N/A	N/A	Chargeable
SP_T_EQUIP_ONLY	<ul style="list-style-type: none"> Equipment award 	<ul style="list-style-type: none"> Follows federal restrictions Capital equipment vests with Stanford. If capital equipment does not vest with Stanford, see Note 1. Excludes fabrication ETs, see Note 2 	Restricted to a set of specific expenditure types. See project templates at the OSR Desk Procedures web page.			Not Chargeable

SELECTING THE CORRECT PROJECT TEMPLATE - *continued*

Template Number	Use this template if	Comments	Subject to A-21	Major Project	Charge Stipends	Unallowables
SP_T_FABRICATION	<ul style="list-style-type: none"> Fabrication project 	<ul style="list-style-type: none"> For fabrication projects only. Fabrication title vests with Stanford. If fabrication does not vest with Stanford, see Note 2 	Restricted to a set of specific expenditure types. See project templates at the OSR Desk Procedures web page.			Not Chargeable
SP_T_PR_SVC_AGREE	<ul style="list-style-type: none"> IPA (Intergovernmental Personnel Agreement) or PAIRE JPA (Joint Personnel Agreement) PAIRE PSA (Personal Service Agreement) 	<ul style="list-style-type: none"> The project template is for use on personal/personnel service agreements only. The project template is limited to salary expenditure types only. <i>Only salary expenditure types listed in the template may be charged. If non-salary expenses are included in the agreement (travel, supplies) the appropriate expenditure type must be added to the template. (PAIRE = Palo Alto Institute for Research and Education)</i> 	No	N/A	No	Not Chargeable

NOTES TO TABLE

	Issue	Description	Procedure/Documentation
1.	Capital Equipment Vesting (Stanford/Non-Stanford title to capital equipment)	All project templates default to Stanford-owned (Stanford vesting) capital equipment. If the capital equipment vests with the sponsor, you will need to adjust the transaction controls on the project.	See Procedure "Adjusting Transaction Controls When Capital Equipment/Capital Fabrications Do Not Vest With Stanford"
		In some cases the Property Management Office (PMO) may request all capital equipment expenditure types to be excluded (because capital equipment is not allowed/budgeted.)	See Procedure "Adjusting Transaction Controls to Block All Capital Expenditure Types"
2.	Fabrications	A fabrication is set up as a separate project using the fabrication project template. The fabrication template defaults to Stanford -owned (Stanford vesting) fabrications. If the fabrication vests with the sponsor, you will need to adjust the transaction controls on the fabrication project.	See Procedure "Adjusting Transaction Controls When Capital Equipment/Capital Fabrications Do Not Vest With Stanford"
3.	Committed cost sharing or cost sharing for overdraft purpose	Committed cost sharing or cost sharing awards for overdraft purpose use the same template and allowed cost schedule as the associated award.	Cost sharing award shares the same project template as the sponsored award. Project Funding at TASK level (TASK 700)
4.	Program Income award	Program income awards use the same project template as the associated award.	
5.	Construction (project is owned by Capital Accounting)	Currently no transaction controls set. Capital/Plant Accounting is responsible for transaction controls on their projects.	
6.	Unallowable Expenditures	Unallowable expenditures are excluded on ALL project templates except template SP_T_NON_FED_NO_A21	A listing of unallowable Expenditure Types can be found on the OSR Desk Procedures web page.
7.	Administrative Charging	Major Project ("MJR_PRJ") templates allow certain administrative expenditure types to be charged to federal awards.	Details about the project templates can be found on the OSR Desk procedures page. Administrative charging is defined by OMB Circular A-21. Stanford's administrative charging policy can be found at RPH 3.6 "Charging for Administrative and Technical Expenses" .