

Sponsored Projects Business Process Flow

ACTION TYPE	ROUTING DOCUMENT	ROUTING METHOD
Account in Advance of Award  If you are requesting the second or subsequent year of funding: if the funds are able to be deposited into the same project, use the Provisional Extension request instructions. If it requires a new project, request via WISPER. Initiate a new WISPER record if none exists.	existing WISPER record	APPROVAL in WISPER
Additional Projects under an Existing Award (Subaccounts)	RSP Subaccount Request form	Paper delivery/mail
Business Associates Agreements		
outgoing preapproved version for UWCCC	new WISPER record	ROUTE in WISPER
all others - incoming & outgoing	Letter, note	to UW Legal, Rebecca Hutton
Carryover Request	Letter, note	e-mail RSP accountant
Clinical Trial Add	Award Summary	Paper delivery/mail
Clinical Trial First Check	existing WISPER record	Paper delivery/mail
Closeout Reports	Letter, note	e-mail RSP accountant
Invention reports, technical reports, etc requiring institutional approval require routing. Any that require no institutional approval can be sent directly from PI to the Sponsor		
Commitment changes more than 25% for Key Personnel	Cost Share/Commitment Update form	Paper delivery/mail
Competing Continuation	new WISPER record	ROUTE in WISPER
Confidential Disclosure Agreement	new WISPER record	ROUTE in WISPER
Continuation	new WISPER record	ROUTE in WISPER
If requesting next year's increment of funding: If only a technical progress report requiring no institutional signature, you may send directly to the Agency. If the request/report requires a budget or statement of costs for the previous or last year or requires institutional signature, route via WISPER.		
Contract or Agreement	new WISPER record	ROUTE in WISPER
Correction of Data or Budget Amount	Letter, note	e-mail RSP
Cost sharing changes	Cost Share/Commitment Update form	Paper delivery/mail
Department change (Project or Award ownership)	Internal Transfore for Proposals/Grants form	Paper delivery/mail
Edits Change	Letter, note	e-mail RSP accountant
eSNAP	no WISPER record	Route in Commons
Fee-for-service Agreement	Business Services Contract Form	Paper delivery/mail
Gift Deposit	Gift Routing Form	Paper delivery/mail
Intergovernmental Personnel Agreement	new WISPER record	ROUTE in WISPER
JIT and other agency follow up	existing WISPER record	APPROVAL in WISPER
Material Transfer Agreement	new WISPER record	ROUTE in WISPER
Modification to Agreement or Award Terms & Conditions	new WISPER record	ROUTE in WISPER
New Application	new WISPER record	ROUTE in WISPER
No-Cost Extension	Letter, note	e-mail RSP accountant
No-Fund Account	new WISPER record	ROUTE in WISPER
PI Change	new WISPER record	ROUTE in WISPER
PI Change on a GIFT project	Gift Routing Form	Paper delivery/mail
Pre-Proposal	new WISPER record	ROUTE in WISPER
Provisional Time Extension	RSP Time extension request form	Paper delivery/mail
Reallocation of previously approved budget	Letter, note	e-mail RSP accountant
Resubmission	new WISPER record	ROUTE in WISPER
Revised Budget	existing WISPER record	APPROVAL in WISPER
Sponsor Personnel Change	Letter, note	e-mail RSP accountant
Sponsored Project Check/Award	new WISPER record	Paper delivery/mail
Sponsored Project Check; Budget Increase*	new WISPER record	Paper delivery/mail
Sponsored Project Check; no Budget Increase	Award Summary	Paper delivery/mail
Supplement	new WISPER record	ROUTE in WISPER
Termination	Letter, note	e-mail RSP accountant
UW Personnel Change (non-PI)		
A change in Key Personnel may require agency approval	Letter, note	e-mail preaward@rsp.wisc.edu
If any personnel change results in a change in effort commitments, route to your accountant.	Cost Share/Commitment Update form	e-mail preaward@rsp.wisc.edu
1. Indicate sponsor contact information in Submission Instructions when relevant.		
2. Indicate Related Record in Submission Instructions or by doing an Add Related Record.		
3. If it is necessary to route paper, print the WISPER record or Award Summary as appropriate & attach the hard copy.		
*If check reflects a release of funding that was included in the original application, use an Award Summary and write "Incremental release of Funding" on top		