

RSP CSWG Business Process #2 (How campus will get CS approved)

Last revised 11/16/10

ISSUE:

The cost sharing process begins with the PI's desire to submit a proposal with cost sharing. The PI must obtain approval to include cost sharing in a proposal. Approval for cost sharing is made by the Dean's or director's office. The business process below details how campus users will obtain approval for cost sharing from their Dean's offices. While the Dean's office has the responsibility of approving cost sharing, they are not obligated to follow a specific process. Each office may customize its own process for cost sharing approvals.

PROCESS with Tool:

1. The PI will decide that s/he wants to offer cost sharing in a proposal.
2. The campus user (most likely an administrator with the PI's assistance) will complete the cost sharing tool. Instructions can be found at the tool's website: <https://www.rsp.wisc.edu/services/admin/CostShareToolkit/CostShareToolkit1.cfm> by clicking on the "Instructions" hyperlink at the top of the page.
3. The campus user will follow the Dean's office procedure for submitting the tool form (possibly obtaining chair's approval first, then sending as an attachment to an e-mail or as an attachment in a WISPER record).
4. The Dean's office will make a determination on the cost sharing request (approve, deny, or suggest modification).
5. If approved, the campus user will create a WISPER record (if not already created) and enter information on the General tab, Approvals tab, and Attachments tab. This information will document that the cost share request was approved by the Dean's office and outline the cost sharing plan. See below and next page.

- i. The WISPER general tab should be filled out by campus, to indicate approved cost sharing is offered in the proposal.

[Enter Protocol Certification Details Here](#)

Personnel

Name	Project Role	Outside Activities Report Submitted	Effort Requirements Met
		No	Yes

Add Other Personnel to Record

Proposed Budget

Direct Costs

F & A Costs

Total Costs

F & A Rate % 1.00

On Campus Yes No

Cost Sharing Included

Cost Sharing Amount

Cost Share Comments

- ii. The WISPER approval tab should be filled out by campus, to indicate Dean's office has reviewed and approved cost sharing in the proposal.

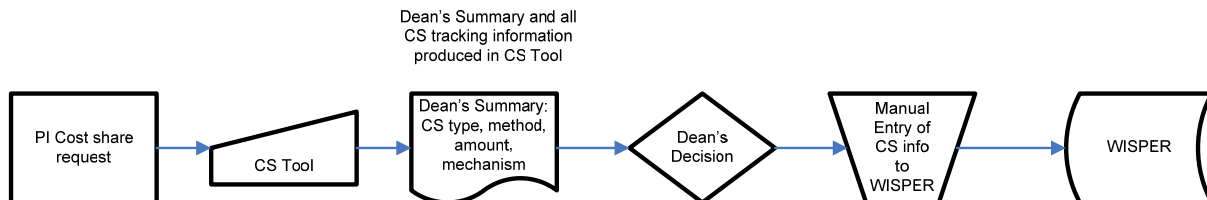
- iii. The WISPER attachments tab can have the Cost sharing tool summary attached, to indicate Dean's office has approved a specific cost sharing plan, as devised by the PI/Dept.

General	Comments	Projects	Approvals	Attachments	Division Action	Terms	SPO Action	History
Record ID	MSN140889				Document Type	CosReimCon	Wisper Help	
Contact PI	ROMERO, MANUELA				Sponsor Name	ACADEMY OF APPLIED SCIENCE		
Short Title	JSEHS				Status	4.5-SPO Negotiation		

Upload Attachment	File Name	File Description	Uploaded By	Upload Date/Time	
1	Financial_StatementRFP2011.doc	Budget	REINHARD, MARGARET P		Add another attachment
2	2011_Narrative_Proposal.doc	Narrative	REINHARD, MARGARET P	11/08/10 3:31PM	Add another attachment
3	cost_share_approval.pdf	Cost Share approva	KUHN MARTIN, TAMARA C	11/09/10 4:17PM	Add another attachment

FLOWCHART

Process with Tool



PROCESS without Tool:

1. The PI will decide to offer cost sharing in a proposal.
2. The PI or campus user will initiate an approval request in the proposal WISPER record. The approval type "Cost Share" should be used and a brief explanation of the cost sharing type, source, and amount should be entered in the text box (see 5.ii. under Process with Tool). The approval request should be routed to the Dean's office.
3. The Dean's or director's office will make a determination on the request. If they select "Approved", this will document that the cost share request was approved by them.
4. If approved, the campus user will enter the appropriate information on the General tab of the WISPER record (see 5.i. under Process with Tool).