

UW Cost Sharing Tool Instructions

- Log into Tool with UW NetID

Step 1

May need to refer to budget and proposal announcement for reference

- Select the appropriate Cost Share Type (Mandatory, Voluntary or Combination)
- Provide a specific justification to support the cost to the University. The Dean or Divisional offices may have specific requirements that must be included.
- Identify if a WISPER record has been created for this proposal. If so, please provide WISPER ID.

Step 2

- Select the appropriate Cost Share Method from the Dropdown box:
 - Direct costs funded through institutional support (payroll or non payroll).
 - Direct costs funded with 3rd party cash contributions (cash that will be deposited into a UW non gift fund/account).
 - Third part in-kind contributions (no UW fund accounts established to document the cost shared expenses. The third party provider will be using own systems.).
 - Indirect costs.
 - Multiple Methods (two or more of the methods listed above).
- Select the appropriate Cost Share Mechanism (may auto fill based on the Cost Share Method).
- Enter the total budget amount for the cost to be paid by the sponsor.
- Enter the total budget amount to be cost shared.

Step 3

Direct costs funded through institutional support - payroll

- Enter appropriate information for the employee who will be cost shared through payroll. (Name, Employee ID, salary Basis, Base Salary, and Fringe Benefit Rate)
- Enter the percent of salary that will be used for cost sharing. The cost share Fringe Benefits amount and the total amount will automatically calculate.
- Enter the appropriate cost share fund, project ID, and department. Verify that the funding to support salary charges is available to meet the cost share obligation.
- Enter the Cost Share Calendar Range (start date and end date).

Direct costs funded through institutional support - nonpayroll

- Click on one or more of the boxes for the cost sharing that will be used.
- For each type selected enter the specific item to be cost shared, its fund, project number, and estimated value.

Direct costs funded with 3rd party cash contributions

- Select Type of Third Party Cost Share (Cash, In-Kind, or Other)

Cash

- Select the appropriate box indicating how the Third Party will meet the cost share requirement (Subawardee Cost Share, UW \$0 Appt. Effort or Other 3rd Party Contributors).
- A Letter of Intent is required for all 3rd party cost share and should be given to the dean's office at the time the cost sharing is reviewed.
- Enter the name of the Third Party who is providing the cost share, include a contact person and contact information.
- Enter the amount/value of the Third Party Cost Share.
- Enter appropriate information for the employee who will be cost shared through payroll. (Name, Employee ID, salary Basis, Base Salary, and Fringe Benefit Rate)
- Enter the percent of salary that will be used for cost sharing. The cost share Fringe Benefits and the total amount will automatically calculate.
- Enter the appropriate cost share fund, project ID and department. Verify that the funding would be available to support the cost share.
- Enter the Cost Share Calendar Range (start date and end date).

or

- Click on one or more of the boxes for the cost share that will be used.
- For each type selected enter the specific item to be cost shared, its fund, project number, and its estimated value.

In-Kind

- A Letter of Intent is required for all 3rd party cost share and should be given to the dean's office at the time the cost share is reviewed.
- Enter the name of the Third Party who is providing the cost share, include a contact person and contact information.
- Enter the amount/value of the Third Party Cost Share.

Other

- Specify the Third Party Cost Share type.
- A Letter of Intent is required for all 3rd party cost share and should be given to the dean's office at the time the cost share is reviewed.
- Enter the name of the Third Party who is providing the cost share and include a contact person and contact information.
- Enter the amount/value of the Third Party Cost Share.
- Third Party In-Kind Contributions.
- If there is more than one 3rd Party Contributor, click on the "Add another 3rd Party Type" button to create additional boxes.

Indirect Costs

- Click on one or more of the boxes for the cost share that will be used.
- For each type selected, enter the specific item to be cost shared, its fund, project number and its estimated value.

Multiple Methods

- Follow the specific instructions outlined above for each appropriate method.

Step 4

- Complete if there is a potential over-commitment issue.

Review

- This screen allows you to review the details as a complete document for each step. **A warning message will appear if the amount of cost share entered does not equal the amount that was entered as been offered.** Each step may be updated as needed. Following completion of the cost share information the user will create a PDF document. The PDF cost share form may be e-mail to the Dean's Office or upload to the WISPER document which is forwarded to the Dean's Office for approval.

If you have questions on how to use the Tool, please contact your Dean's Office or RSP (costshare@rsp.wisc.edu). If you have questions on cost sharing/grants management items, you may want to view the UW Cost Sharing Guidelines at:

http://www.rsp.wisc.edu/costsharing/costsharing_guidance_20101021.pdf
