

Extramural Funds Routing Guidance

ACTION TYPE	ROUTING DOCUMENT	ROUTING METHOD
<b>Preaward</b>		
Pre-Proposal	new WISPER record	Route in WISPER
New Application	new WISPER record	Route in WISPER
JIT and other agency follow up	existing WISPER record	APPROVAL in WISPER
Resubmission	new WISPER record	Route in WISPER
No-Fund Account	new WISPER record	Route in WISPER
Intergovernmental Personnel Assignment (IPA) Agreement	new WISPER record	Route in WISPER
Confidential Disclosure Agreement	new WISPER record	Route in WISPER
Material Transfer Agreement	new WISPER record	Route in WISPER
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
Account in Advance of Award	existing WISPER record	Dean's office uses Division Action tab
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.		button "Request Advance Account of SPO"
Contract or Agreement or Notice of Award	new WISPER record (or existing)	Route in WISPER
Continuation	new WISPER record (or existing)	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.		
Competing Continuation	new WISPER record	Route in WISPER
Modification to Agreement or Award Terms & Conditions	new WISPER record	Route in WISPER
Supplement	new WISPER record	Route in WISPER
Sponsored Project Check/Award	new WISPER record	Attach in WISPER and Paper delivery/mail to RSP Revenue Management Team
Sponsored Project Check; Budget Increase*	new WISPER record	Attach in WISPER and Paper delivery/mail to RSP Revenue Management Team
Additional Projects under an Existing Award (Subaccounts)	new WISPER record	Route in WISPER
PI Change	new WISPER record	Route in WISPER
Provisional Time Extension	new WISPER record	ROUTE in WISPER <a href="#">NCE instructions</a>
No-Cost Extension	new WISPER record	ROUTE in WISPER <a href="#">NCE instructions</a>
Revised Budget		
To adjust the bottom line total amount of an award	new WISPER record	Route in WISPER
To adjust the bottom line total amount of a pending application	existing WISPER record	APPROVAL in WISPER

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To reallocate within the bottom line of previously approved budget (please note that if there are changes in commitments or cost share as a result, see those details on this chart for additional routing requirements)	Letter, note	email <a href="mailto:RSP_accountant">RSP accountant</a>
Department change (Project or Award ownership)	new WISPER record	Route in WISPER
Rejection Notice (Unfunded proposal)	email <a href="mailto:preaward@rsp.wisc.edu">preaward@rsp.wisc.edu</a>	email <a href="mailto:preaward@rsp.wisc.edu">preaward@rsp.wisc.edu</a>
Preaward Questions after award setup	email <a href="mailto:award@rsp.wisc.edu">award@rsp.wisc.edu</a>	email <a href="mailto:award@rsp.wisc.edu">award@rsp.wisc.edu</a>
<b>Post Award</b>		
<b>ACTION TYPE</b>	<b>ROUTING DOCUMENT</b>	<b>ROUTING METHOD</b>
Edits Change	Letter, note	email <a href="mailto:RSP_accountant">RSP accountant</a>
Clinical Trial First Check	existing WISPER record	Attach copy in WISPER and Paper delivery/mail to RSP Revenue Management Team
Clinical Trial Add	<a href="#">Award Summary</a>	Paper delivery/mail to RSP Revenue Management Team
Sponsored Project Check; no Budget Increase	<a href="#">Award Summary</a>	Paper delivery/mail to RSP Revenue Management Team
Commitment changes more than 25% for Key Personnel	<a href="#">Cost Share/Commitment Update form</a>	email <a href="mailto:effort@rsp.wisc.edu">effort@rsp.wisc.edu</a>
Cost sharing changes	<a href="#">Cost Share/Commitment Update form</a>	email <a href="mailto:costshare@rsp.wisc.edu">costshare@rsp.wisc.edu</a>
Sponsor Personnel Change	Letter, note	email <a href="mailto:effort@rsp.wisc.edu">effort@rsp.wisc.edu</a>
UW Personnel Change (non-PI)		
Consult your accountant prior to routing to RSP	Letter, note	email <a href="mailto:effort@rsp.wisc.edu">effort@rsp.wisc.edu</a>
If any personnel change results in a change in effort commitments, route to your accountant.	<a href="#">Cost Share/Commitment Update form</a>	email <a href="mailto:effort@rsp.wisc.edu">effort@rsp.wisc.edu</a>
Correction of Data or Budget Amount	Letter, note	email <a href="mailto:RSP_accountant">RSP accountant</a>
RPPR (NIH)	no WISPER record	Route in eRA Commons
Progress Reports (Interim and Final)	electronic document	email <a href="mailto:RSP_accountant">RSP accountant</a>
Progress Reports Required for Renewal/Continuation	new WISPER record	Route in WISPER
Financial Reports	electronic document	email <a href="mailto:RSP_accountant">RSP accountant</a>
Carryover Request	Letter, note. RSP accountant will handle carryover modifications	email <a href="mailto:RSP_accountant">RSP accountant</a>
Relinquishment of an NIH award	Relinquishing Statement (NIH)	email <a href="mailto:RSP_accountant">RSP accountant</a>
Closeout Reports	Letter, note	email <a href="mailto:RSP_accountant">RSP accountant</a>
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		
Termination	new WISPER record	Route in WISPER
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		