

Extramural Funds Routing Guidance

1. Indicate sponsor contact information in Submission instructions when relevant.
2. Add Related Record to WISPER record.
3. If it is necessary to route paper, print the WISPER record & attach the original document needed.

ACTION TYPE	ROUTING GUIDANCE	ROUTING METHOD
Additional Project under an Existing Award (Subaccount)	New WISPER record	ROUTE in WISPER
Business Associates Agreement	New WISPER Record. If a Business Associate Agreement is part of a Funded Research Agreement, the Business Associate Agreement must be in its own record for tracking purposes for the Provost.	ROUTE in WISPER
Carryover Request	Letter, note	Email RSP Accountant
Clinical Trial Add	Award Summary	Paper delivery/mail to RSP Revenue Management Team
Clinical Trial First Check	Existing WISPER record	Attach in WISPER and paper delivery/mail to RSP Revenue Management Team
Change in Senior/Key Personnel (non-PI) **This is the removal, or replacement, of a key person from the project**		
	If key person listed in the Notice of Award	Prepare letter to be sent to sponsor for approval Email effort@rsp.wisc.edu
	If key person is not listed in the Notice of Award,	Contact the RSP accountant assigned. Email RSP Accountant
Closeout Report (except NIH)		
	If institution approval is required	Letter, note Email RSP Accountant
	If no institution approval is required	Letter, note PI send to Sponsor
Effort Commitment Updates		
	If individual is listed in the Notice of Award - AND - the reduction is greater than 25% of the original commitment	Prepare letter to be sent to sponsor for approval. Also complete a Commitment Update Form Email letter and form to: effort@rsp.wisc.edu
	If individual is listed in the Notice of Award - AND - the reduction is not greater than 25% of the original commitment	Complete a Commitment Update Form Email effort@rsp.wisc.edu
	If individual is not listed in the Notice of Award	No commitment should be entered for those not listed on the NoA. No update is needed. More info here
Competing Continuation	New WISPER record	ROUTE in WISPER
Confidential Disclosure Agreement (CDA)	New WISPER record	ROUTE in WISPER
Continuation (NIH look at Progress Report-RPPR)		
	If the Sponsor requires budget, statement of costs, or institution approval	New WISPER record (or existing) ROUTE in WISPER (or APPROVAL in existing)
	If the Sponsor requires only technical progress report with no institution approval	PI send to Sponsor
Contract or Agreement	New WISPER record (or existing)	ROUTE in WISPER (or APPROVAL in existing)
Correction of Data or Budget Amount	Letter, note	Email RSP Accountant
Cost Sharing Change	Cost Share/Commitment Update	Email costsshare@rsp.wisc.edu
Data Use Agreement	New WISPER Record. If a Data Use Agreement is part of a Funded Research Agreement, the Data Use Agreement must be in its own record for tracking purposes for the Provost. Data Use is used as defined in HIPAA.	ROUTE in WISPER
Department Change (Active Award/Proposal ownership)	https://www.rsp.wisc.edu/forms/granttransfer.pdf	Email RSP Accountant
Edits Change	Letter, note	Email RSP Accountant
F&A Waiver Request	New WISPER record (or existing)	ROUTE in WISPER (or APPROVAL in existing)
Fee-for-Service Agreement	New WISPER record	ROUTE in WISPER
Financial Report	Electronic document	Email RSP Accountant

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Funded Research Agreement		New WISPER record	ROUTE in WISPER
Funded Collaborative Research Agreement		New WISPER record	ROUTE in WISPER
Gift Deposit		Gift Routing	Paper delivery/mail to Business Services
Intergovernmental Personnel Assignment (IPA) Agreement		New WISPER record	ROUTE in WISPER
JIT and other agency follow up		Existing WISPER record	APPROVAL in WISPER
Material Transfer Agreement (Incoming & Outgoing)		New WISPER record	ROUTE in WISPER
Modification to Agreement or Award Terms & Conditions			
	Mod received by RSP - Adding Time & Money that was part of the original proposal (incrementally funded)	New WISPER Record	If signatures are needed, RSP will create a WISPER record to facilitate.
	Mod received by RSP - Adding Time & Money that was not part of the original proposal	New WISPER Record	If a record does not exist already, RSP will create a WISPER record to facilitate proper campus approvals
	Mod received by campus	New WISPER Record	ROUTE in WISPER (or APPROVAL in existing)
New Application/Proposal		New WISPER record	ROUTE in WISPER
NIH Loan Repayment			Email College and School Research Contacts
No-Cost Extension		New WISPER record	ROUTE in WISPER - NCE instruction
Non-Funded Research Related Agreement (e.g. data sharing, non-funded)		New WISPER record	ROUTE in WISPER
PI Change		New WISPER record	ROUTE in WISPER
Pre-Award Question after award setup		Letter, note	Email award@rsp.wisc.edu
Pre-Proposal			
	If the Sponsor requires budget or institution approval	New WISPER record	ROUTE in WISPER
	If the Sponsor does not require budget or institution approval		PI send to Sponsor
Progress Report (Interim and Final)		Electronic document	Email RSP Accountant
	Progress report required for Renewal/Continuation	New WISPER record	ROUTE in WISPER
	NIH Research Performance Progress Report -RPPR	SNAP – No WISPER record nonSNAP – New WISPER record	ROUTE in eRA Commons ROUTE in WISPER
Project in Advance of Award			
	If a new project is required	New WISPER record (or existing)	ROUTE in WISPER (or APPROVAL in existing)
	If requesting a subsequent year of funding	New WISPER record (or existing)	ROUTE in WISPER (or APPROVAL in existing)
Relinquishment		Letter, note, relinquishment statement	Email RSP Accountant
Rejection Notice (Unfunded Proposal)		Existing WISPER record	APPROVAL in WISPER
Resubmission/Proposal		New WISPER record	ROUTE in WISPER
Revised Budget			
	If adjusting the bottom line total amount of a pending application	Existing WISPER record	APPROVAL in WISPER
	If reallocating within the bottom line of previously awarded 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 RSP Accountant
Sponsored Project Check/Award		New WISPER record	Attach in WISPER and paper delivery/mail to RSP Revenue Management Team
Sponsored Project Check - Budget Increase*		Letter, note	Email RSP Accountant
Sponsored Project Check - no Budget Increase		Award Summary	Paper delivery/mail to RSP Revenue Management Team
Supplement		New WISPER record	ROUTE in WISPER
Termination from Sponsor		Letter, note	Email RSP Accountant
Transfer (Institutional)		https://www.rsp.wisc.edu/pitransfers/	