# Quick Guide for Electronic Approval of Cost Share Authorization Forms—For Financial Managers

For questions please contact: Sponsored Programs at 7-2226 or IIE at 7-2228

Purpose: This process allows for electronic approval or denial of cost share commitments for financial managers.

1. When a cost share authorization form has been created for a sponsored project, each financial manager designated to provide cost share commitment(s) will receive an email notifying them of the need to review and approve / deny cost share request(s). The financial manager may click on the link in the email to access the cost share approval page within BanWeb, or log directly in to BanWeb and navigate to the "Cost Share" tab.

EXAMPLE EMAIL:
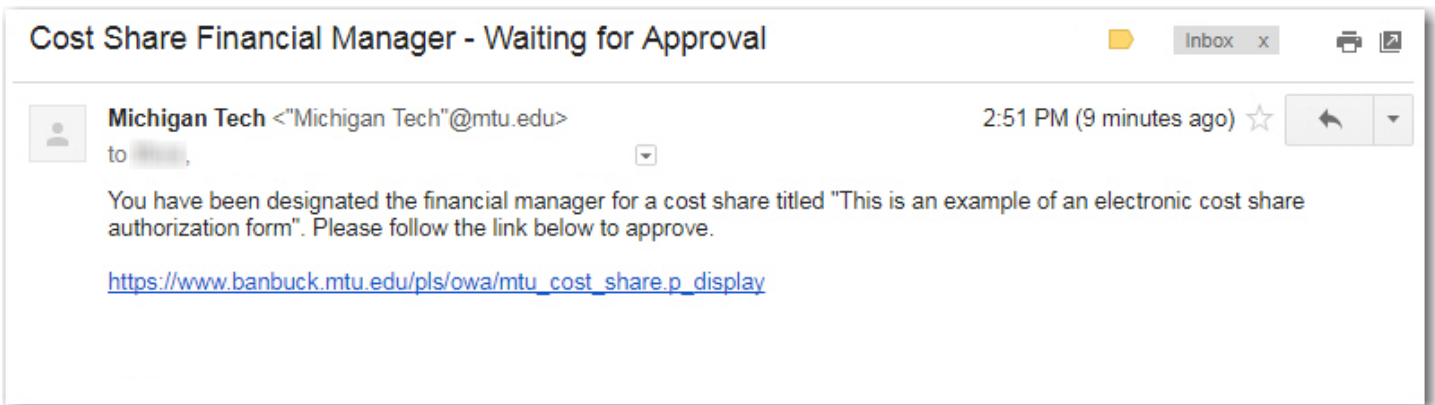
2. All pending cost share forms that are awaiting decision from you will be listed in the dropdown menu called "Waiting on Approve/Deny Decision from You".

3. Using the drop down menu, select the cost share authorization request that you wish to review and then click on "Next Page". The cost share authorization requests are in order by Principal Investigator, Sponsor, and project title.
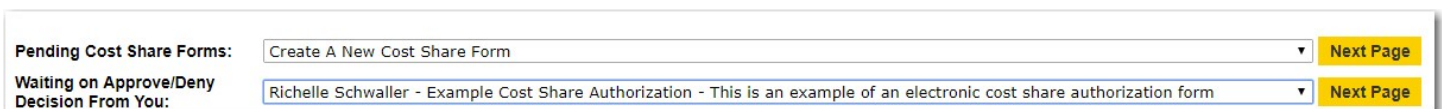
4. The first screen of the cost share authorization form shows basic information regarding the sponsored project. This includes, the Principal Investigator, Co-PI's, project start and end dates, sponsor name, and project title. After reviewing this information, click on "Next Page".

Approving a Cost Share Authorization request:

1. The final page of the cost share authorization form will show the detail for all cost share requested from you.

    As the financial manager you will need to review each line item and (if approving) enter a valid index number to serve as the source of the cost share funds. If the index in unknown, enter "TBD" in the index field.

2. Once the index number(s) have been entered, the "Approve" check box will be available. This box should be checked then click on "Save & Exit" found at the bottom of the screen.

    Note: Partial approvals / denials are not possible.   The form must be approved in its entirety, or denied. The form may be later resubmitted by Sponsored Programs or the PI.

Denying a Cost Share Authorization request:

1. After reviewing a cost share authorization request, it may become necessary to deny the request. In this case, an index number does not need to be entered however, you must click the "Deny" button and then click on "Save & Exit". This action will prompt you to enter a reason for the denial. This reason will then be emailed to Sponsored Programs/IIE, the Principal Investigator and the originator of the form. After entering in the denial reason, click "Deny" and then "OK" to complete the process.

Project Title: This is an example of an electronic cost share authorization form

PI: Richelle Schwaller

Direct Dollar Cost Share

	Commitment Type	Category	Personnel Name	Amount	Dept/Center/Institute	Index #
Year 1	Mandatory	Other (Salary)	Richelle	1,500	AIM	
(#2)	Mandatory	Fringe	Richelle	578	AIM	
			Year 1 Total:	$2,078		
			Grand Total:	$2,078		

Cost Share Decision: ☐ Approve   ☐ Deny

Fin Manager Deny

Reason(s) for Cost Share Denial: *

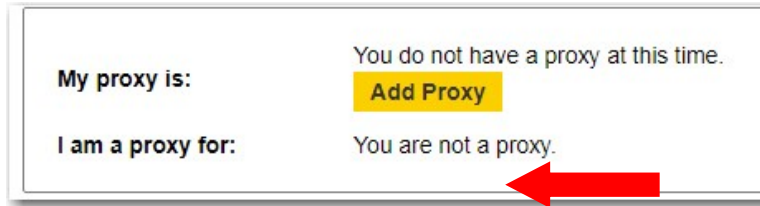(0 characters entered and 3000 remaining)

* required

Deny   **Cancel**

Notice: Clicking Deny will generate an email to the Sponsored Programs Office, PI and originator with the reason(s) you entered above.

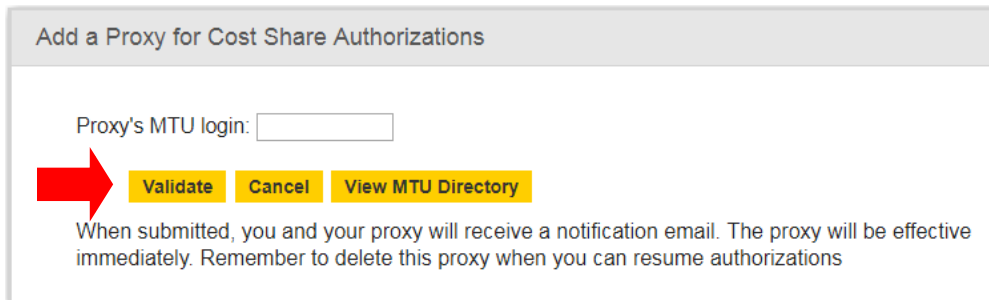## Adding a Proxy for Cost Share Form Approvals

1. To add a proxy, log in to the Cost Share tab located in BanWeb, and select "Add Proxy" found near the bottom of the page. Each financial manager may have one designated proxy.

2. Enter the MTU loigin ID for the person you want to serve as your proxy. If unknown, click "View MTU Directory" to find the correct ID. After entering the Proxy's MTU login, click "Validate". The system will then display the name for the MTU login that you entered. If this correct, click "Submit". You will then see a confirmation that the proxy has been added.
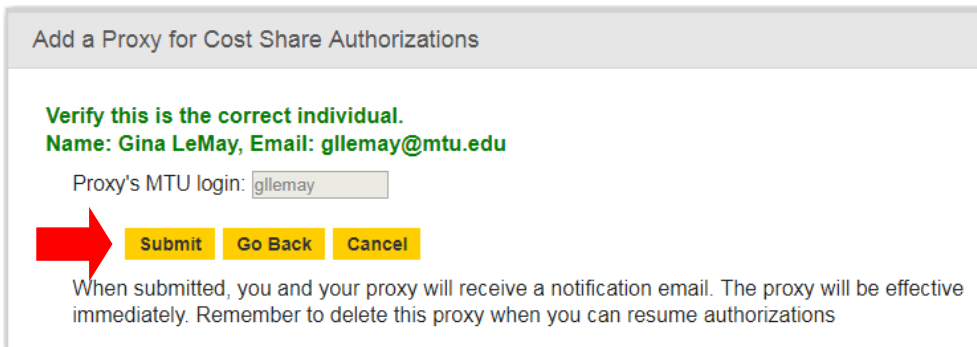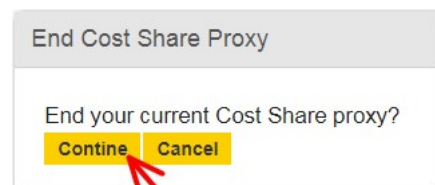

Removing a Proxy for Cost Share Form Approvals

1. On the main menu you will now see your selected proxy listed. To remove the proxy, click "Delete Proxy" and then click "Continue" to confirm your choice.