Cost Share Authorization / Matching Support Form

Instructions for Users
PI or Department Coordinator completes Cost Share Authorization / Matching Support Form on BanWeb

SPO/IIE Analyst reviews form and begins approval process

Emails are generated notifying financial managers of needed action

Approve / Deny decision made by Financial Manager(s)

Approve

Completed Cost Share / Matching Support Authorization Form is generated

Deny

Notification sent to originator, PI and preaward@mtu.edu

Cost Share Authorization Form—User Documentation
To access the Cost Share / Matching Authorization Form:
(hereafter referred to as Cost Share Authorization form)

The form is located on the “Banner Self Service” site at:

https://www.banweb.mtu.edu

Your ID will be your ISO ID (Michigan Tech email user ID)
Your Password is your ISO password

Click on the “Research” Tab, then on “Cost Share”

Note:
Have the budget spreadsheet for your project on hand to use as a reference while completing this form.
From this screen you may choose to create a new Cost Share Authorization Form or review submitted Cost Share Authorization forms.

**To start a new form click “Next Page” just to the right of “Pending Cost Share Forms – Create a New Cost Share Form”**

**To view or edit an existing (but not submitted) form, use the drop down for “Pending Cost Share Forms” to choose (by highlighting) the correct form and click “Next Page”**

**To view a submitted form, use the drop down for “Submitted Cost Share Forms” to choose (By highlighting) the correct form and click “Next Page”**
Note regarding access to Cost Share Authorization forms:

Principal Investigators may access *only* their own authorization forms. Department Coordinators may access *all* forms entered by personnel within their department.
*All fields with a red asterisk are required*

• For the PI enter the Michigan Tech Email User ID – use the link to the Michigan Tech directory if needed

  NOTE: The Michigan Tech Email User ID is the email address without the “mtu.edu” portion

• If applicable, enter up to four Co-PIs (used for informational purposes only)

• Select the appropriate department for the PI

• When complete click “Next Page” to continue
- Based on the start and end dates of the project, the number of project years will appear on this page.

- Select or Input the Commitment Type, Category, Amount, Department/Center/Institute and Index number for each line item.

- After selecting a Department/Center/Institute a list of available financial managers will become available. Each line item must have a financial manager selected for the funding source.
• If a personnel field is selected, a personnel name must be entered in the Personnel name field. If the employee name is unknown, enter “TBD”.

• Salary & Fringe items must be entered as separate line items. Enter the salary line first, including the appropriate personnel name, then click “Add Line.” A Fringe line item will automatically generate. Update the dollar amount for the fringe line item.

1. F&A on Michigan Tech—Enter the amount of Facilities and Administrative Expense (F&A) cost share on Michigan Tech dollars.

2. F&A on Sponsor—Enter the amount of F&A being cost shared (waived) on Sponsor dollars. Also choose if this cost share is: Mandatory, Voluntary Committed, or Voluntary Uncommitted.

When the form is complete, click “Submit for Approval”
When “Submit For Approval” is clicked you need to verify your choice

Click “OK” to proceed or “Cancel” to go back

A message will appear to notify you if any errors are present on the form, including details.

Click “OK” to return to the form and correct the errors

Once all errors are corrected, click “Submit for Approval”
SPO / IIE are notified by email when a cost share authorization form has been submitted. At that time a grant analyst will review the request form and begin the approval process.

When the approval process has been started, each financial manager listed on the form will be notified of a pending request. Each financial manager must log into BanWeb and respond to each request item. If a financial manager denies a cost share request, the system will request a reason, and an email will be sent to the PI, form originator and SPO/IIE. If the form is approved by all financial managers, SPO/IIE will complete the workflow process and a pdf version of the cost share authorization form will be generated.
Example of Cost Share Authorization

**SPONSORED PROGRAMS COST SHARE / MATCHING SUPPORT AUTHORIZATION FORM**

PI: Richelle Schwaller  Dept: Mechanical Engg-Engg Mechanics  Proposal#: B081404

Sponsor: ABC Corp
Project Title: Test - Approve multi year

Is Direct Dollar Cost Share Required by the Sponsor?: ☑ No  ☐ Yes
Does this Project Contain External Cost Share?: ☑ No  ☐ Yes

**DIRECT DOLLAR COST SHARE**

<table>
<thead>
<tr>
<th>Dept Code</th>
<th>Commitment Type</th>
<th>Category</th>
<th>Personnel Name</th>
<th>Index</th>
<th>Amount</th>
<th>Approving Financial Manager(s)</th>
<th>Date</th>
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<tbody>
<tr>
<td>ASISC</td>
<td>VC</td>
<td>Travel</td>
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<td>A11642</td>
<td>$1,500.00</td>
<td>Heather Suokas</td>
<td>06/14/17</td>
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Total Year 1: $1,500.00

**F & A COST SHARE**

<table>
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<th>Year</th>
<th>F&amp;A on Michigan Tech</th>
<th>F&amp;A on Sponsor</th>
<th>Cost Share Type</th>
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Grand Total: $6,325.00

**SPO/IIE Authorized Signature:** ________________________________

**Notes:** Test multiple year, F&A Waiver, single financial manager