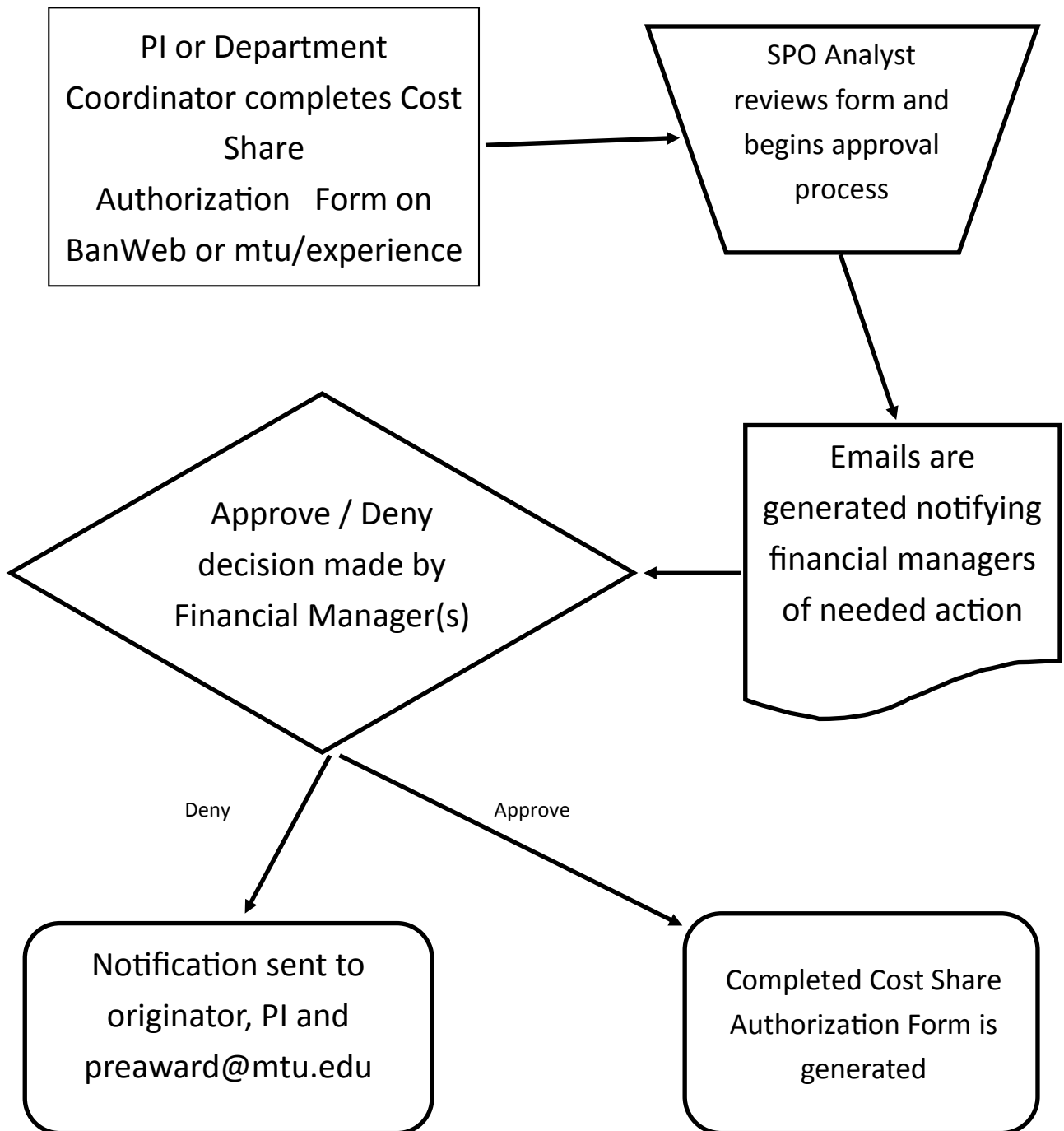


Cost Share Authorization Form

Updated: 3/13/2025

Instructions for Users

Process Overview

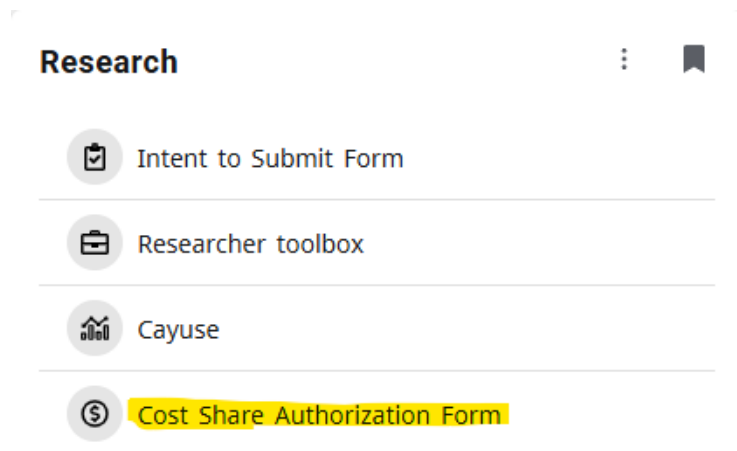


To access the Cost Share Authorization Form:

The form is located on mtu/experience on the Research card:

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

Your Password is your ISO password



Note:

Have the budget spreadsheet for your project on hand to use as a reference while completing this form.

The screenshot shows a web application interface for managing Cost Share Authorization Forms. At the top, there is a navigation bar with tabs: Personal Information, Employees, Research, Finance (selected), and Other Payments. A search bar labeled 'Find a page...' is on the right. Below the navigation bar, a breadcrumb trail reads 'Home > Research > Cost Share'. The user's name 'Richelle A. Schwaller' and the date 'Jun 12, 2012 09:23 am' are displayed in the top right corner. The main content area has a header instruction: 'Select from the category below to create a new Cost Share/Matching Support Authorization Form or select from the drop down to complete a form that has been started.' Below this, there are four sections, each with a label, a dropdown menu, and a 'Next Page' button. The sections are: 'Pending Cost Share Forms' with the dropdown 'Create A New Cost Share Form'; 'Submitted Cost Share Forms' with an empty dropdown; 'Approved Cost Share Forms' with the dropdown 'Todd Van Valkenburg - This is just a test - A Test'; and 'All Cost Share Forms' with the dropdown 'Todd Van Valkenburg - This is just a test - A Test (Approved)'. At the bottom, there is a footer bar with links: Finance Queries, View Document, Finance Reports, and Delete Finance Template.

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 an asterisk (*) are required. Information on this form should match your transmittal sheet.

PI: * Tammy LaBissoniere (tklabiss) Change PI
Co-PI: Add Co-PI
Department: * 42001 - Vice Pres for Research
Project Start: * 06/24/12 (mm/dd/yy) **End Date: *** 06/24/14
Sponsor Name: * ABC Company
Project Title: * This is test of the cost share form
 (0 characters entered and 255 remaining)

Is Direct Dollar Cost Share Required by the Sponsor?: * ☒ Yes ☐ No * If Yes, Explain: 20% TPV
Does Project Contain External Cost Share?: * ☐ Yes ☒ No

Next Page Save & Exit Delete This Cost Share Form

***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

PI: Richelle Schwaller

<u>Direct Dollar Cost Share</u>						
	Commitment Type	Category	Personnel Name	Amount	Dept/Center/Institute	Financial Manager
Year 1	Voluntary Committe ▼	Supplies ▼		2,000	42001 - Vice Pres for Re ▼	Jenich, Cathy (cmjenich)
Year 1 Total:				\$2,000		
Grand Total:				\$2,000		

<u>F & A Cost Share</u>		
	F & A on Michigan Tech	F & A on Sponsor
Year 1	0	0
		Cost Share Type Not Selected ▼
Total:	\$0	\$0

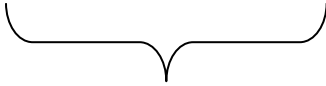
Notes:

(0 characters entered and 127 remaining)


- 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.

F & A Cost Share		
	F & A on Michigan Tech	F & A on Sponsor
Year 1	736	1,000
Year 2	1,120	0
Total:	\$1,856	\$1,000



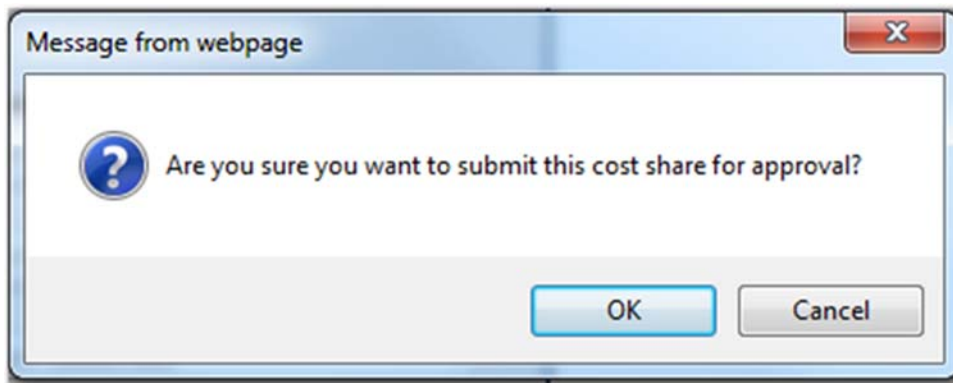
1



2

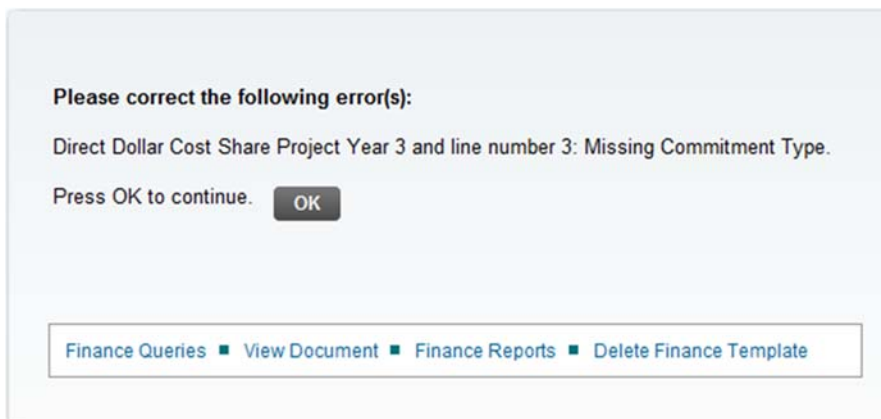
1. F&A on Michigan Tech—Enter the amount of Facilities and Administrative Expense (F&A) cost share on Michigan Tech dollars.
2. F&A on Sponsor—Enter the amount of F&A being cost shared (waived) on Sponsor dollars. Also choose if this cost share is: Mandatory, Voluntary Committed, or Voluntary Uncommitted.

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 is notified by email when a cost share authorization form has been submitted. At that time a grant analyst will re-view 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. If the form is approved by all financial managers, SPO will complete the workflow process and a pdf version of the cost share authorization form will be generated.

Example of Cost Share Authorization



Michigan Tech

SPONSORED PROGRAMS COST SHARE / MATCHING SUPPORT AUTHORIZATION FORM

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

Sponsor: ABC Corp

Project Start Date: 08/14/17

Project Title: Test - Approve multi year

Project End Date : 08/13/20

Is Direct Dollar Cost Share Required by the Sponsor?: ☒ No ☐ Yes

Does this Project Contain External Cost Share?: ☒ No ☐ Yes

DIRECT DOLLAR COST SHARE

Dept Code	Commitment Type	Category	Personnel Name	Index	Amount	Approving Financial Manager(s)	Date
ASISC	VC	Travel		A11642	\$1,500.00	Heather Suokas	08/14/17
					Total Year 1:	\$1,500.00	

F & A COST SHARE

Year	F&A on Michigan Tech	F&A on Sponsor	Cost Share Type	Total	T
1	\$0.00	\$750.00	VCW	\$750.00	
2	\$0.00	\$1,000.00	VCW	\$1,000.00	
3	\$0.00	\$325.00	VCW	\$325.00	
Total:	\$0.00	\$2,075.00		\$2,075.00	

Grand Total: \$6,325.00

SPO/IE Authorized Signature: _____

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