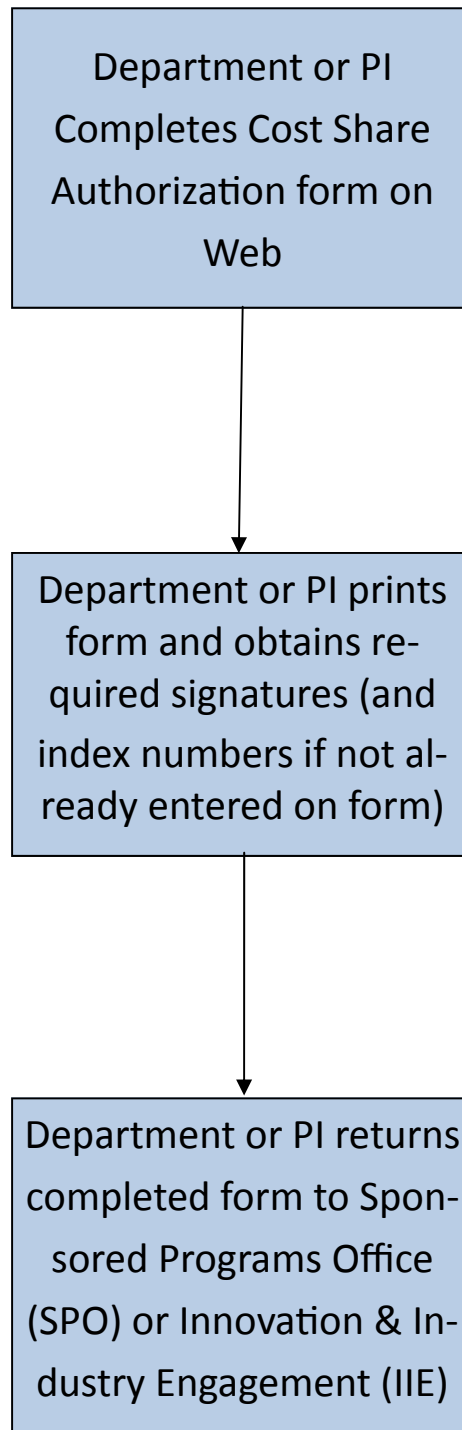


# Cost Share Authorization Form

Instructions for Users

# Process Overview



# To access the Cost share 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

Browse

Welcome, Richelle A. Schwaller, to BANWEB!

Find a page...



|   |                      |                 |         |  |
|---|----------------------|-----------------|---------|--|
| Personal Information  | Employees            | Research        | Finance | Other Payments   |
| Address information, Safety First Alert, emergency contacts, marital status, and survey | Employee Information | Cost Share Form |         | Student Insurance, Enrollment Deposit, Parking Tickets, Broomball Fee, Grad School Binding Fees, Direct Deposit Information. |

Click on the “Research” Tab



Click on “Cost Share”

**Note:**

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

The screenshot shows a web application interface with a navigation bar at the top containing links for Personal Information, Employees, Research, Finance (highlighted), and Other Payments. A search bar is located in the top right corner. Below the navigation bar, the 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. The main content area features a dropdown menu with the 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 are four sections, each with a dropdown menu and a "Next Page" button: "Pending Cost Share Forms" (selected: "Create A New Cost Share Form"), "Submitted Cost Share Forms", "Approved Cost Share Forms" (selected: "Todd Van Valkenburg - This is just a test - A Test"), and "All Cost Share Forms" (selected: "Todd Van Valkenburg - This is just a test - A Test (Approved)"). A blue arrow points to the dropdown arrow of the "Pending Cost Share Forms" section. At the bottom, there is a utility bar with links for "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 form.

**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 the correct form and click “Next Page”**

**To view a submitted form, use the drop down for “Submitted Cost Share Forms” to choose 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 User ID – use the link to the Michigan Tech directory if needed

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

- If applicable, enter up to four Co-PIs may be entered (used for informational purposes only)
- Select the appropriate department for the PI
- When complete Click “Next Page” to continue



| Direct Dollar Cost Share |                 |              |                |               |                       |          |
|--------------------------|-----------------|--------------|----------------|---------------|-----------------------|----------|
| Year                     | Commitment Type | Category     | Personnel Name | Amount        | Dept/Center/Institute | Index #  |
| Year 1                   | Not Selected    | Not Selected |                | 0             | Not Selected          |          |
|                          |                 |              |                | Year 1 Total: | \$0                   |          |
| Year 2                   |                 |              |                |               |                       | Add Line |
| Year 3                   |                 |              |                |               |                       | Add Line |
|                          |                 |              |                | Grand Total:  | \$0                   |          |

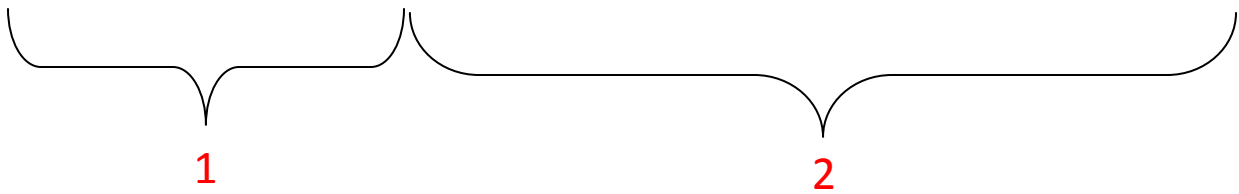
  

| F & A Cost Share       |                  |                 |
|------------------------|------------------|-----------------|
| F & A on Michigan Tech | F & A on Sponsor | Cost Share Type |
| Year 1                 | 0                | Not Selected    |
| Year 2                 | 0                | Not Selected    |
| Year 3                 | 0                | Not Selected    |
| Total:                 | \$0              | \$0             |

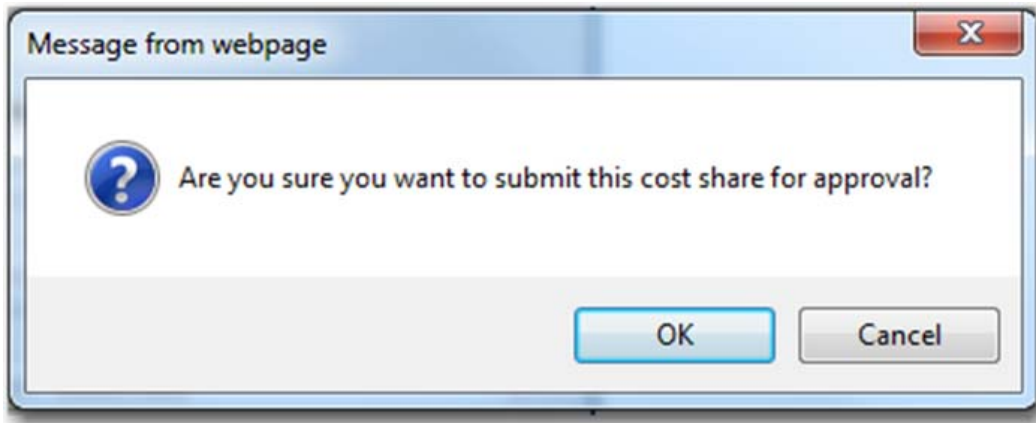
- Based on the start and end dates of the project, the number of project years will appear on this page
- Select the Commitment Type, Category, Amount, Department/Center/Institute and Index number for each line item (Index # may be left blank if unknown at time of entry but must be obtained prior to final document being submitted)
- If a personnel field is selected, a personnel name must be entered in the Personnel name field. If 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                   | Cost Share Type   |
| Year 1           | <input type="text" value="736"/>   | <input type="text" value="1,000"/> | <input type="text" value="Not Selected"/>   |
| Year 2           | <input type="text" value="1,120"/> | <input type="text" value="0"/>     | <input type="text" value="Not Selected"/> <ul style="list-style-type: none"> <li><input type="text" value="Mandatory Waiver"/></li> <li><input type="text" value="Voluntary Committed Waiver"/></li> <li><input type="text" value="Voluntary Uncommitted Waiver"/></li> </ul> |
| <b>Total:</b>    | <b>\$1,856</b>                     | <b>\$1,000</b>                     |   |

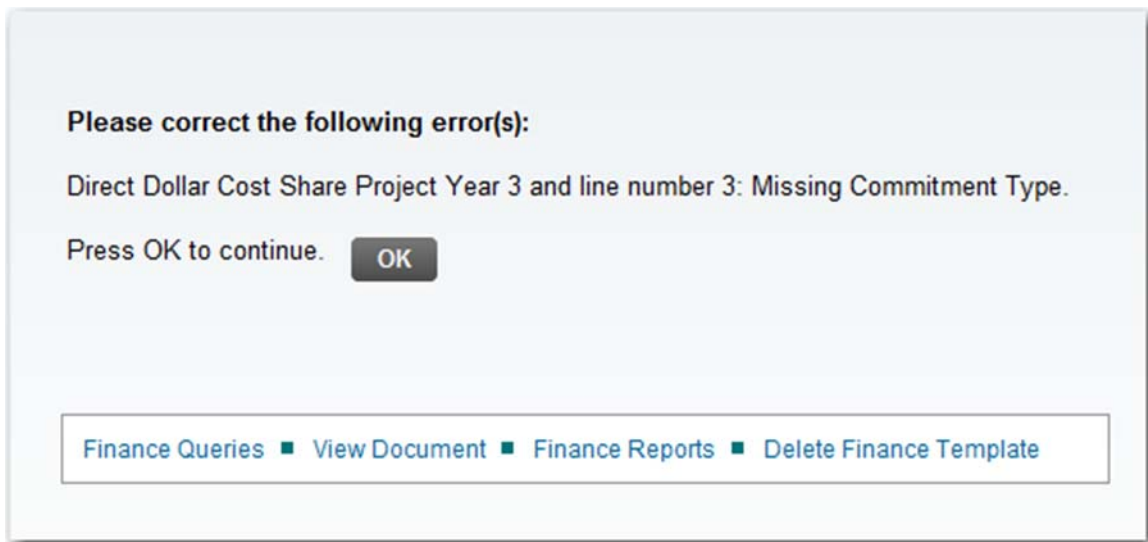


1. F&A on Michigan Tech—Enter the amount of Facilities and Administrative Expense (F&A) cost share on Michigan Tech dollars
  
2. F&A on Sponsor—Enter the amount of F&A being cost shared (waived) on Sponsor dollars. Also choose if this cost share is: Mandatory, Voluntary Committed, or Voluntary Uncommitted.

When 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.

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

Once all errors are corrected, click “Submit for Approval”



Once the form is submitted, an email from [preaward@mtu.edu](mailto:preaward@mtu.edu) will be sent to the person who completed the form as well as the PI listed. This will be a notification that your cost share authorization form has been received by the Sponsored Programs Office / Office of Innovation & Industry Engagement.

Your completed Cost Share Authorization Form will be attached to this email. Print this form to collect the needed signatures, and any index numbers not already entered on the form.

# Example of Cost Share Authorization Form



## SPONSORED PROGRAMS COST SHARE / MATCHING SUPPORT AUTHORIZATION FORM

PI: RichelleSchwaller    Dept: Vice Pres for Research    Proposal#:

Project Title: Studying dog and cat psychology

Project Start Date: 08/25/12

Project End Date : 08/25/14

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

If Yes, explain:    1:1 Match

Does this Project Contain External Cost Share?:  No     Yes

### DIRECT DOLLAR COST SHARE

| Dept Code   | Commitment Type | Category       | Personnel Name | Index  | Amount        | Authorized Signature(s) | Date       |
|---|-----------------|----------------|----------------|--------|---------------|-------------------------|------------|
| 22800   | M               | Other (Salary) | Jane Doe       | A12345 | \$1,000.00    |                         |            |
| 22800   | M               | Fringe         | Jane Doe       | A12345 | \$380.00      |                         |            |
| **If the department does not fulfill the requirements of the graduate school, the department is responsible for necessary funding to meet the obligatory match. |                 |                |                |        | Total Year 1: |                         | \$1,380.00 |
| Dept Code   | Commitment Type | Category       | Personnel Name | Index  | Amount        | Authorized Signature(s) | Date       |
| 22800   | M               | Equipment      |                | A12345 | \$15,000.00   |                         |            |

## *In Summary:*

- Print the Cost Share Authorization form that is attached to the email from [preaward@mtu.edu](mailto:preaward@mtu.edu)
  
- Obtain all required signatures (and index numbers if not already entered on form)
  
- Submit the completed form to SPO or IIE along with your transmittal

