

Instructions for Effort Commitment and/or Cost Share Update Form

This form is used to add or revise effort commitments and/or cost share on sponsored projects (Funds 133, 142, 143, or 144). One form required for each type of update.

The form can be found at: https://rsp.wisc.edu/forms/costshareCommitment_update/index.cfm.

For all types of updates enter the Project ID and complete the Reason for Update section:

<p>Project ID (Project receiving commitment or cost share)</p> <input type="text"/> <p>Example: AAA####</p>	<p>Reason for Update (i.e. why is addition/removal needed, what is changing from original entry)</p> <div style="border: 1px solid gray; height: 80px; width: 100%;"></div> <p>If applicable, attach supporting document(s) or spreadsheet(s) to email with completed update form.</p>
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- **Project ID:** Enter the Federal or Non-Federal project that will receive the effort commitment or cost share.
- **Reason for Update:** Provide as much information about this update as you can, so those approving the request understand the situation.
 - why is the effort commitment being added or revised,
 - why is the cost share being added, revised, or removed,
 - if non-payroll cost share update, explain the addition, what is it, how does it relate to this project, etc.
 - if applicable, include supporting documentation, spreadsheets, copies of third party letters, etc.

Please note:

- Only one type of request can be made per form. I.e. you cannot request an Effort Commitment Update using the same form as a request for a Non-Payroll Cost Share update.
- Each request is for one project; however, for effort commitment and payroll cost share requests, more than one individual can be included on the request.
- Each request should be emailed separately. Multiple requests per email can result in an update being missed.
- Effort commitment updates are emailed to effort@rsp.wisc.edu. All other requests are emailed to costshare@rsp.wisc.edu.

The subject line of the submission email should be as follows:

- Effort updates: Effort Commitment Update, AAA####, MM/DD/YYYY (= date of submission).
- Cost share updates:
 - Payroll cost share update, AAA####, MM/DD/YYYY (= date of submission)
 - Non-Payroll cost share update, AAA####, MM/DD/YYYY (= date of submission)

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Effort Commitment Update

Complete this section to add a new effort commitment to a sponsored project or to revise an existing effort commitment to a sponsored project.

Effort commitments are entered for individual(s) that are required to be tracked for reporting purposes. If you are unsure of the current commitment, or whether the proposed change is significant enough to require sponsor approval, please email effort@rsp.wisc.edu. Reductions of 25% or more require sponsor approval, which is obtained by a separate process, if necessary.

✕ ✓ **Effort Commitment Update**
Please complete all fields below.

Update Type

Employee ID	Start Date	End Date	Sponsored %	Cost Share %	Total %
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="0"/> %	<input type="text" value="0"/> %	<input type="text"/>

+ Add

📄 Preview/Print Form

Button will be bright red and active when form is ready to preview and print.

If any portion of the effort commitment will be cost shared, a separate request to enter the payroll cost share update should be completed following the instructions in the next sections. A link to a new update form will pop-up if an amount is entered in the cost share % cell:

✕ ✓ **Effort Commitment Update**
Please complete all fields below.

Update Type

Employee ID	Start Date	End Date	Sponsored %	Cost Share %	Total %
<input type="text" value="00182156"/>	<input type="text" value="02/01/2021"/>	<input type="text" value="02/28/2021"/>	<input type="text" value="10"/> %	<input type="text" value="10"/> %	<input type="text" value="20"/> %

Employee Information
DEARMOND, KRISTI A | A340270
ACCOUNTANT - ADVANCED

Payroll Cost Share Update also needed. Please complete form at https://rsp.wisc.edu/forms/costshareCommitment_update/.

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📄 Preview/Print Form

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Payroll Cost Share Update – Information

- **NAME**: The individual’s name will appear below the Employee cell after you enter the Empl ID and tab to the next cell. If it does not, the form will not be created correctly. It may take a few seconds for the name to populate.

- **MULTIPLE ROWS**: If multiple cost share rows will be needed, click the add button for each additional row needed, up to 10 rows. Additional entries can be for the same person or other individuals, as long as each person will be providing cost share to the project indicated as Project ID at the beginning of the form. Note: If more than 10 rows are required, please indicate Form ___ of ___ in the Reason for Update section and combine all form pages into one PDF before submitting.

- **PRINTING FORM TO PDF**: When all entries are complete, the Preview/Print Form button should be bright red. Clicking on this button will create a PDF that can be saved and attached to an email to be forwarded to your Dean/Director for review, approval and submission.

- **SOURCE FUNDING**: The source funding must be funding the individual is paid from, or will be paid from, each pay period between cost share start and end dates.
 - If you are unsure of payroll, you will need to work with your payroll coordinator to obtain this information. If the request is for pay periods that have already processed, the payroll split is viewable on the RSP Effort Payroll Query: <https://rsp.wisc.edu/effort/lookup/EffortPayroll.cfm>

- **COST SHARE PERCENTAGE**: The cost share requested must be less than or equal to the percent the individual is paid on the funding source. The cost share system allows for two decimal points, this is not the same as allowed at proposal or in the effort system.
 - For example - PI is cost sharing 12% of payroll on a Federal project. The PI has 136 funding to use as cost share. Example payroll distribution below:

Project	Fund	Dept	Earned Period		Total	Percentage
	101	483205	09/01/2020	09/30/2020	\$4,661.10	74.9998793%
	136	483240	09/01/2020	09/30/2020	\$621.49	10.0001448%
233G011	233	483200	09/01/2020	09/30/2020	\$124.30	2.0000611%
AAB9144	144	483200	09/01/2020	09/30/2020	\$497.18	7.9999228%
AAD4225	144	483200	09/01/2020	09/30/2020	\$310.74	4.9999920%
09/30/2020:					\$6,214.81	

The cost share will not process because payroll from 136 funding is only 10% when 12% is being requested for cost share. Either payroll or cost share will need to be revised in order for the cost share to process.

- **COST SHARE ON MULTIPLE PROJECTS:** An individual can have cost share on more than one project; however, the total amount of cost share must be less than or equal to the payroll available on the source funding. The cost share system allows for two decimal points, this is not the same as allowed at proposal or in the effort system.
 - For example, PI is cost sharing 8% of their payroll on 144-A and 3% of their payroll on 144-B for the same time period. The PI has 136 funding to use as cost share. Example payroll distribution below:

Project	Fund	Dept	Earned Period		Total	Percentage
	101	483205	09/01/2020	09/30/2020	\$4,661.10	74.9998793%
	136	483240	09/01/2020	09/30/2020	\$621.49	10.0001448%
233G011	233	483200	09/01/2020	09/30/2020	\$124.30	2.0000611%
AAB9144	144	483200	09/01/2020	09/30/2020	\$497.18	7.9999228%
AAD4225	144	483200	09/01/2020	09/30/2020	\$310.74	4.9999920%
09/30/2020:					\$6,214.81	

The cost share will not process because payroll from 136 funding is only 10% when 11% is being requested for cost share. Either payroll or cost share will need to be revised in order for cost share to process.

If you are unsure of other cost share scheduled for an individual, you may request a cost share report from the cost share team. Please email costshare@rsp.wisc.edu and provide the individual's name and EmplID.

- **COST SHARE PERCENT LIMIT:** Within the cost share system, the cost share percent can only include two decimal points. Additionally, the cost share system will not round up. If payroll is 10.54999%, the cost share percent would need to be 10.54%. The cost share system allows for two decimal points, this is not the same as allowed at proposal or in the effort system.
- **COST SHARE SCHEDULES:** Payroll cost share can be scheduled by month or in line with actual pay periods. Defer to your division for guidance.
 - This may depend on pay basis. A-Basis (calendar year) employees fit the calendar month payroll. C-Basis (academic year) employees, have an offset monthly payroll. H-Basis (hourly employees) are paid every two weeks.
 - If a C-Basis employee will be scheduled during summer months, there must be non-sponsored funding available for cost share purposes. Or the summer months should not be included in the cost share schedule.
- **LENGTH OF COST SHARE SCHEDULE:** It is recommended, but not required, that payroll cost share, covering long periods of time, be broken into smaller periods, in case of changes to future periods.
 - Example: Award period is 1/1/2021 – 12/31/2024. It may be beneficial to break the schedule into six month periods that align with effort reporting and fiscal year-end.

New Cost Share Entry

Complete this section is to add new payroll cost share to a project. For example, cost share not entered during award set-up, entry for employee who was not known at time of award set up, or entry of new/additional employees to meet cost share requirements.

✕ ✓ **Payroll Cost Share Update - New Cost Share Entry**
Please complete all fields below. If no source project, enter N/A.

Employee ID	Start Date	End Date	Cost Share %	Mand/Vol		
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/> %	Select... ▾		
			Source Project	Source Fund	Source Dept.	
			<input type="text"/>	<input type="text"/>	<input type="text"/>	
			AAAXXXX; "N/A" if none.	101, 150, etc.	027000, etc.	

+ Add

Preview/Print Form

Button will be bright red and active when form is ready to preview and print.

Completed example:

✕ ✓ **Payroll Cost Share Update - New Cost Share Entry**
Please complete all fields below. If no source project, enter N/A.

Employee ID	Start Date	End Date	Cost Share %	Mand/Vol		
00186568	02/01/2021	05/31/2021	15 %	Mandat ▾		
Employee Information NOYCE, DAVID A A191500 PROFESSOR			Source Project	Source Fund	Source Dept.	
			<input type="text"/>	<input type="text"/>	<input type="text"/>	
			AAAXXXX; "N/A" if none.	101, 150, etc.	027000, etc.	

+ Add

Preview/Print Form

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When all entries are complete, the Preview/Print Form button should be bright red. Clicking on this button will create a PDF to be attached to an email and forwarded to your Dean/Director for review, approval and submission to costshare@rsp.wisc.edu. Forwarding of the email constitutes Dean/Director approval of the request.

The subject line of the email should be: Payroll cost share update, AAA####, MM/DD/YYYY (= date of submission)

Payroll Cost Share Update – Revise/Remove Existing Cost Share

Complete this section to remove or revise scheduled cost share. For example, removal of future cost share if cost share requirement has been met, revise cost share to increase amount of cost share for employee, removal and replacement of faculty, or error in set up.

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Payroll Cost Share Update - Revise/Remove Existing Cost Share
Please complete all fields below. If no source project, enter N/A. Currently Scheduled Cost Share is found on the award or project cost share tab in WISER.

Update Type

Select...
▼

Employee ID

Start Date

End Date

Cost Share %

 %

Mand/Vol

Select...
▼

Source Project

AAAXXXX;
"N/A" if none.

Source Fund

101, 150, etc.

Source Dept.

027000, etc.

+ Add

🖨️ Preview/Print Form

Button will be bright red and active when form is ready to preview and print.

Remove Cost Share Schedule

Open WISER to the cost share tab of the project that requires cost share. You will need the cost share schedule details in order to complete the request:

Financials
Personnel
Award Modifications
Requirements
Edits
Cost Share
Documents
WISPER

Schedule

To Project	Name	Empl ID	Start Date	End Date	C/S %	Source Project	Source Fund	Source Dept	C/S Type	Distrib Status
AAC1426	NOYCE, DAVID A	00186568	01/06/2017	05/31/2017	10%		101	191500	Mandatory	Distributed
AAC1426	NOYCE, DAVID A	00186568	09/01/2017	01/05/2018	10%		101	191500	Mandatory	Distributed
AAC1426	NOYCE, DAVID A	00186568	09/01/2021	01/05/2022	11%		101	191500	Mandatory	New Row
AAC1426	NOYCE, DAVID A	00186568	10/17/2020	05/31/2021	11%		101	191500	Mandatory	Distributed

Under Update Type – Choose Remove. Enter the corresponding information from WISER for the row to be removed. If more than one row will be removed, click on the Add button and choose Remove from the Update Type for each row to be removed.

Example: The following cost share schedule on the cost share tab should not have been entered.

AAC1426	NOYCE, DAVID A	00186568	10/17/2020	05/31/2021	11%		101	191500	Mandatory
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The request to remove this schedule would be completed as follows:

Payroll Cost Share Update - Revise/Remove Existing Cost Share
Please complete all fields below. If no source project, enter N/A. Currently Scheduled Cost Share is found on the award or project cost share tab in WISER.

Update Type

Remove ▼

Employee ID	Start Date	End Date	Cost Share %	Mand/Vol
<div style="border: 1px solid #ccc; padding: 2px;">00186568</div>	<div style="border: 1px solid #ccc; padding: 2px;">10/17/2020</div>	<div style="border: 1px solid #ccc; padding: 2px;">05/31/2021</div>	<div style="border: 1px solid #ccc; padding: 2px; display: flex; align-items: center;">11 %</div>	<div style="border: 1px solid #ccc; padding: 2px; display: flex; align-items: center;">Mandato ▼</div>
Employee Information NOYCE, DAVID A A191500 PROFESSOR		Source Project	Source Fund	Source Dept.
		<div style="border: 1px solid #ccc; padding: 2px;">N/A</div> <small>AAAAA; "N/A" if none.</small>	<div style="border: 1px solid #ccc; padding: 2px;">101</div> <small>101, 150, etc.</small>	<div style="border: 1px solid #ccc; padding: 2px;">191500</div> <small>027000, etc.</small>

+ Add

Preview/Print Form

Button will be bright red and active when form is ready to preview and print.

When all entries are complete, the Preview/Print Form button should be bright red. Clicking on this button will create a PDF to be attached to an email and forwarded to your Dean/Director for review, approval and submission to costshare@rsp.wisc.edu . Forwarding of the email constitutes Dean/Director approval of the request.

The subject line of the email should be: Payroll cost share update, AAA####, MM/DD/YYYY (= date of submission)

Revise Cost Share Schedule

If a change (revision) should be made to an existing cost share schedule, open WISER to the cost share tab of the project that requires cost share. You will need the cost share schedule details in order to complete the request:

[Financials](#) [Personnel](#) [Award Modifications](#) [Requirements](#) [Edits](#) **Cost Share** [Documents](#) [WISPER](#)

Schedule

To Project	Name	Empl ID	Start Date	End Date	C/S %	Source Project	Source Fund	Source Dept	C/S Type	Distrib Status
AAC1426	NOYCE, DAVID A	00186568	01/06/2017	05/31/2017	10%		101	191500	Mandatory	Distributed
AAC1426	NOYCE, DAVID A	00186568	09/01/2017	01/05/2018	10%		101	191500	Mandatory	Distributed
AAC1426	NOYCE, DAVID A	00186568	09/01/2021	01/05/2022	11%		101	191500	Mandatory	New Row
AAC1426	NOYCE, DAVID A	00186568	10/17/2020	05/31/2021	11%		101	191500	Mandatory	Distributed

Under Update Type – Choose Currently Scheduled. Enter the row exactly as it appears in WISER.

Next, click on the + Add button for a new row. Under Update Type – Choose Revise To and enter the new cost share details.

Example: This cost share schedule should have been for 12.5% instead of 11%.

AAC1426	NOYCE, DAVID A	00186568	10/17/2020	05/31/2021	11%		101	191500	Mandatory
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Payroll Cost Share Update - Revise/Remove Existing Cost Share

Please complete all fields below. If no source project, enter N/A. Currently Scheduled Cost Share is found on the award or project cost share tab in WISER.

Update Type

Currently Scheduled ▼

Employee ID

00186568

Start Date

10/17/2020

End Date

05/31/2021

Cost Share %

11

 %

Mand/Vol

Mandatc ▼

Employee Information
NOYCE, DAVID A | A191500
PROFESSOR

Source Project

N/A

AAAXXXX;
"N/A" if none.

Source Fund

101

101, 150, etc.

Source Dept.

191500

027000, etc.

Update Type

Revise To ▼

Employee ID

00186568

Start Date

10/17/2020

End Date

05/31/2021

Cost Share %

12.5

 %

Mand/Vol

Mandatc ▼

Employee Information
NOYCE, DAVID A | A191500
PROFESSOR

Source Project

N/A

AAAXXXX;
"N/A" if none.

Source Fund

101

101, 150, etc.

Source Dept.

191500

027000, etc.

+ Add

- Remove

Preview/Print Form

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When all entries are complete, the Preview/Print Form button should be bright red. Clicking on this button will create a PDF to be attached to an email and forwarded to your Dean/Director for review, approval and submission to costshare@rsp.wisc.edu . Forwarding of the email constitutes Dean/Director approval of the request.

The subject line of the email should be: Payroll cost share update, AAA####, MM/DD/YYYY (= date of submission)

If multiple cost share schedules will be revised, enter the Currently Scheduled cost share followed by each row to show the Revise To. Then, enter the next Currently Scheduled followed by the rows showing the next row's revisions.

Example: These two rows should both be 12.5% cost share.

AAC1426	NOYCE, DAVID A	00186568	10/17/2020	05/31/2021	11%		101	191500	Mandatory
AAC1426	NOYCE, DAVID A	00186568	09/17/2020	10/16/2020	20.5%		101	191500	Mandatory

Payroll Cost Share Update - Revise/Remove Existing Cost Share
Please complete all fields below. If no source project, enter N/A. Currently Scheduled Cost Share is found on the award or project cost share tab in WISER.

Update Type
Currently Scheduled

Employee ID
00186568

Start Date
10/17/2020

End Date
05/31/2021

Cost Share %
11 %

Mand/Vol
Mandate

Employee Information
NOYCE, DAVID A | A191500
PROFESSOR

Source Project
N/A
AAAXXXX;
"N/A" if none.

Source Fund
101
101, 150, etc.

Source Dept.
191500
027000, etc.

Update Type
Revise To

Employee ID
00186568

Start Date
10/17/2020

End Date
05/31/2012

Cost Share %
12.5 %

Mand/Vol
Mandate

Employee Information
NOYCE, DAVID A | A191500
PROFESSOR

Source Project
N/A
AAAXXXX;
"N/A" if none.

Source Fund
101
101, 150, etc.

Source Dept.
191500
027000, etc.

Update Type
Currently Scheduled

Employee ID
00186568

Start Date
09/17/2020

End Date
10/16/2020

Cost Share %
20.5 %

Mand/Vol
Mandate

Employee Information
NOYCE, DAVID A | A191500
PROFESSOR

Source Project
N/A
AAAXXXX;
"N/A" if none.

Source Fund
101
101, 150, etc.

Source Dept.
191500
027000, etc.

Update Type
Revise To

Employee ID
00186568

Start Date
09/17/2020

End Date
10/16/2020

Cost Share %
12.5 %

Mand/Vol
Mandate

Employee Information
NOYCE, DAVID A | A191500
PROFESSOR

Source Project
N/A
AAAXXXX;
"N/A" if none.

Source Fund
101
101, 150, etc.

Source Dept.
191500
027000, etc.

Revise and Remove Cost Share Schedule

If both revisions and removal of cost share are needed, first the Currently Scheduled cost share should be entered. Under Update Type – Choose Currently Scheduled and enter the cost share schedule exactly as it appears in WISER. The subsequent rows would be to indicate the removal and revision needed. The rows should be in chronological order.

Example: This cost share schedule should not have Included December or January in the schedule and starting in February, the cost share should have had 101 195245 as the source funding.

AAC1426	NOYCE, DAVID A	00186568	10/17/2020	05/31/2021	11%		101	191500	Mandatory
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Payroll Cost Share Update - Revise/Remove Existing Cost Share

Please complete all fields below. If no source project, enter N/A. Currently Scheduled Cost Share is found on the award or project cost share tab in WISER.

Update Type

Currently Scheduled
▼

Employee ID

00186568

Start Date

10/17/2020

End Date

05/31/2021

Cost Share %

11
%

Mand/Vol

Mandatc
▼

Employee Information
NOYCE, DAVID A | A191500
 PROFESSOR

Source Project

N/A

AAAXXXX;
"N/A" if none.

Source Fund

101

101, 150, etc.

Source Dept.

191500

027000, etc.

Update Type

Revise To
▼

Employee ID

00186568

Start Date

10/17/2020

End Date

11/30/2020

Cost Share %

11
%

Mand/Vol

Mandatc
▼

Employee Information
NOYCE, DAVID A | A191500
 PROFESSOR

Source Project

N/A

AAAXXXX;
"N/A" if none.

Source Fund

101

101, 150, etc.

Source Dept.

191500

027000, etc.

Update Type

Remove
▼

Employee ID

00186568

Start Date

12/01/2020

End Date

01/31/2021

Cost Share %

11
%

Mand/Vol

Mandatc
▼

Employee Information
NOYCE, DAVID A | A191500
 PROFESSOR

Source Project

N/A

AAAXXXX;
"N/A" if none.

Source Fund

101

101, 150, etc.

Source Dept.

191500

027000, etc.

Update Type

Revise To
▼

Employee ID

00186568

Start Date

02/01/2021

End Date

05/16/2021

Cost Share %

11
%

Mand/Vol

Mandatc
▼

Employee Information
NOYCE, DAVID A | A191500
 PROFESSOR

Source Project

N/A

AAAXXXX;
"N/A" if none.

Source Fund

101

101, 150, etc.

Source Dept.

195245

027000, etc.

If multiple cost share schedules have revisions and removals, enter the Currently Scheduled cost share followed by each row to show the Remove and Revise To. Then, enter the next Currently Scheduled followed by the rows showing the next rows revisions and removals.

When all entries are complete, the Preview/Print Form button should be bright red. Clicking on this button will create a PDF to be attached to an email and forwarded to your Dean/Director for review, approval and submission to costshare@rsp.wisc.edu . Forwarding of the email constitutes Dean/Director approval of the request.

The subject line of the email should be: Payroll cost share update, AAA####, MM/DD/YYYY (= date of submission)

Non-Payroll Cost Share Entries

Non-payroll cost share includes expenses incurred by the UW for the benefit of the sponsored project using non-sponsored funding, third party cost share, and unfunded F&A/unrecovered indirect costs.

Regardless of the type of non-payroll cost share, Mandatory or Voluntary, must be indicated along with the total dollar amount to be entered: In rare cases, this would be Voluntary, as most times only Mandatory cost share would use non-payroll sources.

The screenshot shows a web form for entering non-payroll cost share. At the top, there is a header with a red 'X' icon and a green checkmark icon, followed by the title "Non-Payroll Cost Share" and the instruction "Select type and choose one of the following options." Below this, there are two input fields: "Type" with a dropdown menu set to "Mandatory" and "Total Amount" with a text box containing "\$ 150.00". Underneath these fields, there are three radio button options, each with a red 'X' icon and a green checkmark icon. The first option is "Non-Payroll Expenses" with the instruction "Submit spreadsheet of WISER transaction details with completed form. [Sample Spreadsheet](#)". The second option is "Third Party" with the instruction "Official statement from third party is required. [Example here](#)". The third option is "Unfunded F&A" with the instruction "Provide calculations, either in the reason for update section or attach Excel spreadsheet." At the bottom of the form, there is a red button labeled "Preview/Print Form" and a note: "Button will be bright red and active when form is ready to preview and print."

Non-Payroll Expenses

For non-payroll expenses incurred by the UW, expenses must be incurred and posted to WISER prior to being entered into the cost share system. These types of expenses must also be allowable as cost share.

If they are allowable and have been incurred, along with the update form, submit an excel spreadsheet which includes the transactional detail. A link to a sample spreadsheet is available on the form. Or your own spreadsheet can be submitted. At a minimum, the following columns must be included:

Fund, Dept, Project, Program, Account, Employee, Acct Desc, Amount, Line Descr, PO ID, Voucher ID, Jrnl Ln Ref, Source, Jrnl ID, Vch Invoice ID, Invoice Date, Pay Run Descr, Jrnl Line.

Instructions for adding these columns to your view in WISER is on the bottom of the sample spreadsheet. You may need to scroll the spreadsheet in order to read all of the instructions. Or you can review WISER help documents <https://www.wisconsin.edu/sfs/reporting/wisdms-and-wiser/#wiser-training-materials>

Examples of potential cost shared transactions are also noted on the spreadsheet.

F&A calculations are not necessary to be included. F&A will calculate on transactions automatically, as long as F&A would apply to the transaction.

The institutional rate for the award is used for the F&A calculations. If you are not sure what the institutional rate is, please contact costshare@rsp.wisc.edu or your RSP Accountant.

This form can also be used to indicate non-payroll expenses to be removed. The reason for update would be completed to indicate why they need to be removed. The Excel spreadsheet would be included with the transactions that need to be removed.

Third Party Non-Payroll Cost Share

Third party cost share comes from outside of the UW. Many times this comes from subawardees and is included on their invoice submissions. If that is the case, your RSP Accountant may enter without the form and request being needed. If not, the form, along with a copy of the invoice would be submitted through your Dean/Director's office to costshare@rsp.wisc.edu and copies the RSP Accountant.

For other third party cost share, a commitment letter would have been included with the grant proposal. Once that commitment has been met, the third party should confirm they have met the commitment and submit a confirmation letter. A sample copy of a confirmation letter can be found [here](#) and is also linked to the update form. The cost share update form, along with a copy of the confirmation letter should be submitted through your Dean/Director's office to costshare@rsp.wisc.edu and copy your RSP Accountant.

Unfunded F&A Non-Payroll Cost Share

The final type of non-payroll cost share is unfunded F&A, also called unrecovered indirect costs. Unfunded F&A is F&A that would have been associated with the grant, except the sponsor required a lower F&A rate or waived the F&A. The use of unfunded F&A requires prior approval by the sponsor, which may be obtained at the proposal stage and indicated in the award document.

The amount to be used as unfunded F&A is the difference between the F&A rate in place at the time of award and the awarded F&A rate. For example, if UW F&A rate on research awards is 55% (for specific rates in effect, see <https://rsp.wisc.edu/rates/>); however, the sponsor only allows the use of 35% F&A. The difference, 20%, would be used to calculate the amount of F&A that would have been chargeable to the grant, but instead will be used as cost share.

The calculation of the amount must be included as documentation for the cost share to be included. This can either be within the reason for transfer or on an Excel spreadsheet. Typically, an Excel spreadsheet showing all transactions and the calculations is used.

Example:

Sponsored project incurred \$30,000 in direct costs, the sponsor limited the F&A rate to 35%, UW F&A rate was 55%. The award should be charged \$10,500 in F&A expense ($\$30,000 * 35\% = \$10,500$). At 55%, the F&A charged would have been \$16,500. The \$6,000 difference is the unfunded F&A amount.

Another example of how to calculate (award does not allow any F&A, but does allow unfunded as cost share) using details from WISER:

Period: Inception - Feb 2021			
Summary Level: 5			
Account	Budget	MTD	Actuals
EXPENSES			
Expenses			
Direct Expenses			
Salaries			
[1051] Academic Staff - Annual	0.00	0.00	\$ 8,128.16
Fringe Benefits			
[1975] Academic-Fringe-Gift/Fed Trf	0.00	0.00	\$ 2,823.20
[198E] General-Fringe-Calc'd Enc	0.00	0.00	\$ -
Supplies			
[3105] Supplies-Laboratory	0.00	0.00	\$ 359.85
Other Expenditures			
[2620] Services - Professional	0.00	0.00	\$ 37.65
[ZDIRECT] All Direct Costs Projbud	141,500.00	0.00	\$ -
SUBTOTAL DIRECT AVAILABLE BALANCE	141,500.00	0.00	\$11,348.86
TOTAL INDIRECT COSTS (F&A)	0.00	0.00	\$ -
TOTAL INCLUDING F&A	141,500.00	0.00	\$11,348.86
			* 55%
			\$ 6,241.87
All expenses could have F&A if MTDC were allowed.			

NOTE: The current F&A rates are listed at: <https://rsp.wisc.edu/rates/> . The base rate to be used for unfunded F&A is the type of award being submitted. Public service and State of WI agencies tend to have lower F&A rates than Research awards. State of WI awards also have other restrictions which are included in the footnotes on the rates webpage.