

TRANSACTION TYPE		WISPER ROUTING GUIDANCE (prior to 06/26/2023)	RAMP ROUTING GUIDANCE (starting 06/26/2023)
Additional Project under an Existing Award (Subaccount)		New WISPER record	Use "Request Award Modification" button. Select New project number/advance spending on subsequent year of funding on Smartform. Include full description of request.
Business Associates Agreement		New WISPER record. If a Business Associate Agreement is part of a Funded Research Agreement, the Business Associate Agreement must be in its own record for tracking purposes for the Provost	New RAMP Agreement record. If a Business Associate Agreement is part of a Funded Research Agreement, the Business Associate Agreement will be linked to the Funded Research Agreement by "Managing Relationships" in RAMP.
Carryover Request		Letter, note	Email RSP Accountant. No change at RAMP go live.
Change in Senior/Key Personnel (non-PI) **This is the removal, or replacement, of a key person from the project**	If key person is listed in the Notice of Award	Prepare letter to be sent to sponsor for approval	Use "Request Award Modification" button. Select Change in Key Personnel (other than PI) on Smartform.
	If key person is not listed in the Notice of Award,	Contact the RSP accountant assigned	Email RSP Accountant. No change at RAMP go live.
Clinical Trial Check Payments		Award Summary	See Check Routing Guidance
Closeout Report (e.g., Final Technical Report)	If institution approval is required	Letter, note	Email RSP Accountant. No change at RAMP go live.
	If no institution approval is required		
Competing Continuation / Renewal (NIH Type 2)		New WISPER record	Use "Create Renewal" button on the workspace of a Funding Proposal in the Awarded state.
Competing Revision (NIH Type 3)			Use "Create Revision" activity on the workspace of a Funding Proposal in Awarded state.
Confidential Disclosure Agreements (CDA)		New WISPER record	New RAMP Agreement record. If a Confidential Disclosure Agreement is part of a Funded Research Agreement, the Confidential Disclosure Agreement will be linked to the Funded Research Agreement by "Managing Relationships" in RAMP.
Continuation (NIH look at Progress Report-RPPR)	If the Sponsor requires budget, statement of costs, or institution approval	New WISPER record (or existing)	Use "Create Continuation" button on the workspace of an Award record in the Active state.
	If the Sponsor requires only technical progress report with no institution approval		PI send to sponsor
Continuation (Non-competing continuation; progress report, NIH Type 5)			Use "Create continuation" button on the workspace of an Award record in the Active state.

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Contracts / Research Agreement		New WISPER record (or existing)	New RAMP Agreement record. Use "Create Agreement" action to associate RAMP Agreement record with Funding Proposal or Award Record.
Correction of Data or Budget Amount		Letter, note	Email RSP Accountant. No change at RAMP go live.
Cost Share Updates		Cost Share/Commitment Update	Cost Share/Commitment Update
Data Use Agreement		New WISPER record. If a Data Use Agreement is part of a Funded Research Agreement, the Data Use Agreement must be in its own record for tracking purposes for the Provost. Data Use is used as defined in HIPAA.	New RAMP Agreement record. If a Data Use Agreement is part of a Funded Research Agreement, the Data Use Agreement will be linked to the Funded Research Agreement by "Managing Relationships" in RAMP.
Department Change (Active Award/Proposal ownership)		https://www.rsp.wisc.edu/forms/granttransfer.pdf	Email RSP Accountant. No change at RAMP go live.
Edits Change		Letter, note	Email RSP Accountant. No change at RAMP go live.
Effort Commitment Updates	If individual is not listed in the Notice of Award	No commitment should be entered for those not listed on the NoA. No update is needed	
	If individual is listed in the Notice of Award - AND- the reduction is greater than 25% of the original commitment	Prepare letter to be sent to sponsor for approval. Also complete a Commitment Update Form	Email RSP Accountant. No change at RAMP go live.
	If individual is listed in the Notice of Award - AND- the reduction is not greater than 25% of the original commitment	Complete a Commitment Update Form	Complete a Commitment Update Form
F&A Waiver Request		New WISPER record (or existing)	Use the "Manage Ancillary Reviews" activity on the workspace of a Funding Proposal. Add a new Ancillary Review to Brenda Egan as reviewer and Review Type "Indirect Cost Waiver"
Fee-for-Service Agreement		New WISPER record	New RAMP Agreement Record.
Financial Reports		Electronic document	Email RSP Accountant. No change at RAMP go live.
Funded Research Agreement		New WISPER record	New RAMP Record: Funding Proposal and Agreement record.
Gift Deposits		Gift Routing	Gift Routing
Intergovernmental Personnel Assignment (IPA) Agreements		New WISPER record	New RAMP Record: Funding Proposal and Agreement record.

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Just In Time (JIT) Requests and other agency follow-up		Existing WISPER record	Use "Send Grants Status" activity activity on the workspace of a Funding Proposal in the Pending Sponsor Review state. Select "JIT Changes Requested" in the SmartForm. If "Send Grants Status" activity is not available, use the "Send Email" activity and select the RSP Specialist as the recipient.
Limited PI			Use the "Manage Ancillary Reviews" activity on the workspace of a Funding Proposal. Add a new Ancillary Review to ___ as reviewer and Review Type "Limited PI." Add documentation.
Material Transfer Agreement (MTA)		New WISPER record	New RAMP Agreement record. If a Material Transfer Agreement is related to a Funded Research Agreement, the Material Transfer Agreement will be linked to the Funded Research Agreement by "Managing Relationships" in RAMP.
Modification to Agreement or Award Terms & Conditions	Mod received by RSP - Adding Time & Money that was part of the original proposal (incrementally funded)	New WISPER record	RSP will "Create Award Modification".
	Mod received by RSP - Adding Time & Money that was not part of the original proposal	New WISPER record	RSP will "Create Award Modification" and select "NOA has been received by department/division" on SmartForm.
	Mod received by campus	New WISPER record	Use "Request Award Modification" button in RAMP and select "NOA has been received by department/division" on SmartForm.
			Use "Request Award Modification" button on the workspace of an Award record in the Active state. Select the appropriate Request Type in the SmartForm.
NIH Loan Repayment			Contact Brenda Egan in RSP.
New Proposal Applications, Competing Continuations (Renewal), Resubmissions		New WISPER record	Use "Create Funding Proposal" button in RAMP.
No-Cost Extensions (NCE)		New WISPER record	Use "Request Award Modification" button in RAMP. Select No Cost Extension on SmartForm. Add an Ancillary Review to the appropriate Division/School/College to the Mod Request. NCE's require Division approval.

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Non Funded Research Agreements		New WISPER record	New RAMP Agreement record. If a Non-Funded Research Related Agreement is part of a Funded Research Agreement, the Agreement will be linked to the Funded Research Agreement by "Managing Relationships" in RAMP.
Non-competing continuation (progress report, NIH type 5)			Use "Create continuation" button on the workspace of an Award record in the Active state.
PI Change		New WISPER record	Use "Request Award Modification button on the workspace of an Award record in the Active State. Select Change in Key Personnel (PI change) on Smartform.
Post-Submission Materials and Sponsor Questions			Use Manage Ancillary Review? OR Use "Send Email" activity in RAMP on the workspace of an Funding Proposal to send an email to the assigned Specialist for this record. Attach the documents for the specialist to submit to the sponsor. Identify the email address where the materials are to be sent and the deadline.
Pre-Award Question after Award Setup		Letter, note	Email RSP Accountant. No change at RAMP go live.
Pre-Proposal	If the Sponsor requires budget, institution approval or submission	New WISPER record	Use "Create Funding Proposal" button in RAMP. After submission, record status will be changed to "Withdrawn." If the sponsor invites PI to submit a full proposal, use the "Copy" activity on the pre-proposal Funding Proposal workspace, then complete and route the record as you would a new funding proposal.
	If the Sponsor does not require budget or institution approval		PI send to sponsor.
Progress Report	If the sponsor need institution approval or submission		Use "Create Continuation" button on the workspace of an Award record in the Active state.
	If sponsor does not require institution approval or submission		PI send to sponsor
Progress Report (NIH type 5 RPPRs)		SNAP – No WISPER record nonSNAP - New wisper record	Use "Create Continuation" button on the workspace of an Award record in the Active state.

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Project in Advance of Award	If a new project is required	New WISPER record (or existing)	Use the "Request Advance Account" activity on the Funding Proposal. Include justification for the Advance Account. If your dean's/divisional office approves the request, it is routed to RSP for processing.
	If requesting a subsequent year of funding	New WISPER record (or existing)	Use the "Request Award Modification" activity on the active Award record. Select "New project number/advance spending on subsequent year of funding". Include full description of requested changes. If your dean's/divisional office approves the request, it is routed to RSP for processing.
Proposal documents unrelated to budget needing signature while still in draft			Use "Send Email" activity on the workspace of the Funding Proposal. Select RSP Proposal Team.
Rejection Notice (Unfunded Proposal)		Existing WISPER record	Use "Withdraw Submitted or Not Funded Proposal" activity on the Pending Sponsor Review Fundind Proposal Record. Indicate Reason for Withdrawal as "Not Funded".
Relinquishment		Letter, note, relinquishment statement	Email RSP Accountant. No change at RAMP go live.
Renewal / Competing Continuation (NIH Type 2)			Use "Create Renewal" button on the workspace of a Funding Proposal in the Awarded state.
Resubmission of proposal (NIH -AI suffix)		New WISPER record	Use "Create Resubmission" activity in RAMP from the workspace of a Funding Proposal in "Not Funded" State
Revised Budget	Correction of Data or Budget Amount		Email RSP Accountant. No change at RAMP go live.
	If adjusting the bottom line total amount of a pending application	Existing WISPER record	Use "Manage Ancillary Reviews (Type: Other)" or "Send Email" activity to obtain Dean's Office review and approval. Then, use "Manage Ancillary Reviews (Type: Other)" or "Send Email" to request "RSP Specialist" review and submission.
	If reallocating within the bottom line of previously awarded budget (please note that if there are changes in commitments or cost share as a result, see those details on this chart for additional routing requirements)	Letter, note	Email RSP Accountant. No change at RAMP go live.

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Revision (NIH Type 3)		Use "Create Revision" activity in RAMP from the workspace of an Awarded Funding Proposal.
Sponsored Project Check - Budget Increase	Letter, note	Email RSP Accountant. No change at RAMP go live.
Sponsored Project Check/Award	New WISPER record	See Check Routing Guidance
Supplements	New WISPER record	Use "Create Revision" activity in RAMP from the workspace of an Awarded Funding Proposal.
Termination or Early Termination Notice	Letter, note	Email RSP Accountant. No change at RAMP go live.
Transfer (Incoming from another Institution)		Use "Create Funding Proposal" button in RAMP. Question 1, Type of Application, "Is this award being transferred from another institution?" Answer yes.
Transfer (Institutional)	https://www.rsp.wisc.edu/pitransfers/	Email RSP Accountant. No change at RAMP go live.