GUIDE TO COMPLETING AND ROUTING
COST SHARE FORM

How to Use this Guide

This guide will show a person how to complete and route their cost share form within RES.

The cost share form will need to be **approved and uploaded with the proposal 5 business days prior to the sponsor deadline.**

The internal budget must be finalized with your Grants and Contracts Administrator before you can route your cost share form. If you have questions regarding budgeting cost share, please see the ORA's Cost Share at Proposal Stage website.
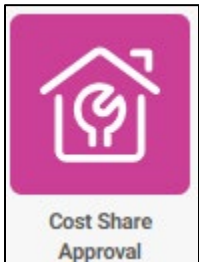
Accessing Form

Navigate to the Cost Share Form one of two ways.

1). Within your proposal development shell in RES, navigate to the Preproposal Section and click **+ Add Form.** You can then choose the Cost Share Form.
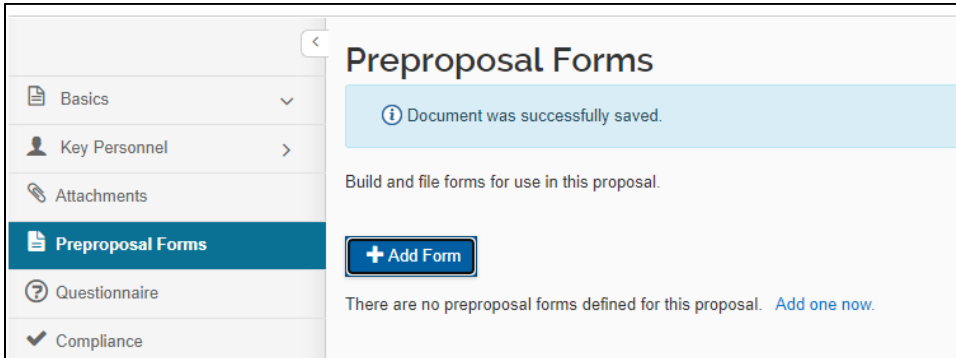
Or

2). On the RES webpage, select the link for the RES Build Forms. This will bring you to the RES Build website and you can click on the Cost Share tile.

2a. Within the tile, navigate to the top right-hand corner and click "new."

Completing the Form

To start, on the top half of the form, **fill out** the Kuali Proposal Number, PI Name, Proposal Sponsor, Originating Sponsor (if applicable), Proposal Title.

Then, **answer** the question regarding VCRI Cash. This would be cash that the Vice Chancellor of Research and Innovation is committing from VCRI funds. This is **rare**.

Upload the final UML internal budget document.

Cost Share Approval Form

If committed cost share is being proposed, a completed and fully approved copy of this form is required to be sent to the Office of Research Administration prior to submission of the final proposal. If the proposal is awarded it is the Principal Investigator's responsibility to ensure that all cost share documentation is completed according to the award terms. Should the cost share change at the time of the award, it is the responsibility of the PI to notify the Grants and Contracts Administrator (GCA) to initiate a new Cost Share Approval Form.

Additional information regarding cost sharing at proposal stage can be found on the ORA website.

Kuali Proposal Number

Enter Proposal Number Here

Principal Investigator *

🔍 Select PI

Proposal Sponsor *

Enter Sponsor Here

Originating Sponsor, if applicable

Enter Sponsor Here

Proposal Title *

Enter Proposal Title

Is this VCRI Cash? *

This is **RARE**, you must have discussed this with the Vice Chancellor

○ Yes
○ No

Budget Attachment *

Select a File

Next, in the Cost Share section, you will enter in the specific cost share being budgeted.

*After you enter the first line, subsequent lines show up.

Cost Share Type:

- **Tuition & Fees –** The waived portion of Tuition for Academic Graduate Research Assistants. This is the difference between the $8,000 sponsor contribution and the full tuition and fees.
- **In-Kind Salary & Fringe –** The waived salary and fringe combined of the person budgeted. Typically provided in the form of a course release.
- **F&A –** This is any indirect costs that apply to the budgeted cost share section or any indirect costs that were waived from the Sponsor funded section.
- **Third Party –** This is cost share being provided by an organization besides UML (a sub-award, industry partner, etc). The organization's cost share commitment is also required to be uploaded.
- **VCRI Cash** – This is cash that the Vice Chancellor of Research and Innovation is providing from the VCRI accounts. This is rare and requires documentation from the Vice Chancellor.
- **Other** – This is cost share not included in the above. Examples are: Items such as Supplies, Travel, or Equipment being paid from a RIF or Department account.
    - *If other is chosen then two extra boxes will appear. They are speedype and speedtype owner.
        - **Speedtype**: Enter the speedtype that will cover the cost share cost listed.
        - **Speedtype Owner**: Search for and select the UML person that owns the account listed in the speedtype section. This will route this section to the person for approval.

Amount: Enter in the amount from UML's internal budget for the specified cost share type.

Year: Enter in the year you expect these the item to be cost shared.

Notes: Describe what is being cost shared. For example "1 Course Release for PI: Sara Akashian"

Total Amount: Review the total amount to make sure it matches the amount listed on your UML internal budget.

Approver Emails

This section captures approvals required on the cost share form. In each section you will enter the applicable UML approver. The required approver types will show based on cost share types added.

As you start typing a person's name you must click the box that shows their name to connect their email to the form.

Principal Investigator – Start typing the PI's name and select the person to connect them to this document for approval.

GCA Approval – Start typing the name of the Grants and Contracts Administrator working on this proposal and select them to connect them to this document for approval.

Executive Director, Office of Research Admin - Start typing the name of the Executive Director of ORA and select them to connect them to this document for approval.

Department Chair - Start typing the name of the Department Chair of the PI and select them to connect them to this document for approval.

Dean or Associate Dean of Research - Start typing the name of the Dean or Associate Dean of Research for the PI and select them to connect them to this document for approval.

Speedtype Ower – Start typing the name of the person who owns the Speedype account that was chosen for the "Other" cost share type. When you see their name, select them to add them to this document for approval.

Once all required approvers have been added, click the **Submit** button. This will submit the cost share form for approvals.
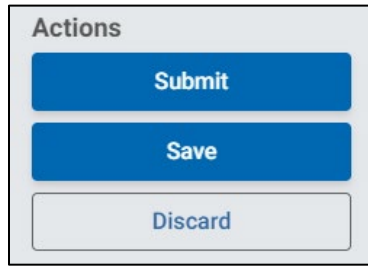
Once all approvals are complete the PI will receive an email stating the cost share form is approved and will include a PDF attachment of the approved form. This PDF must be **uploaded** in the **Attachments** section **prior** to the proposal being routed to ORA.

If an approver does not approve or has questions regarding the cost share form, the approver may return the cost share form back to the PI. The PI will get an email that the form has been returned with notes for dclining approval or requested revisions. The PI can then revise, if applicable, and resubmit for approvals.

Approver Guide

For the guide on how to review and approve the cost share form please see the Cost Share Approver Guide on the RES Job Aid website.

Checking Status of Approvals

To check the status of approvals in the form, navigate to https://uml.kualibuild.com/ or through the RES Build Forms link on the RES Website.

From there click on the Cost Share form link.

This will show any forms you have submitted. Navigate to the form in question and click on it.

Your submitted form will appear. Go to the upper lefthand side of the document and change the view from Review to Status.
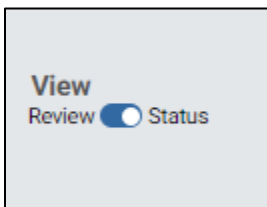
This will then show you the approval workflow and who the form is waiting on for approvals.

Workflow Status (In Progress)

Form Submission - Proposer
Submitted for Approval | Proposer
✅ Akashian, Sara - December 12, 2023 at 11:25 AM

Principal Investigator Signature
Task Completed
✅ Akashian, Sara - December 12, 2023 at 11:27 AM
🖉 Electronically signed by Akashian, Sara (sara_akashian@uml.edu)
December 12, 2023 at 11:27 AM

GCA Approval
Task Completed
✅ Akashian, Sara - December 12, 2023 at 11:29 AM
🖉 Electronically signed by Akashian, Sara (sara_akashian@uml.edu)
December 12, 2023 at 11:29 AM

Executive Director, Office of Research Admin Signature
Waiting for Task Completion
◯ Akashian, Sara

Chair
Waiting for Task Completion
◯ Akashian, Sara

Dean
Waiting for Task Completion
◯ Akashian, Sara

Task
Waiting for Task Completion
◯ Akashian, Sara