

Cost Share Commitment Workflow

Cost Sharing refers to a portion of a sponsored project or program costs that is paid by the University. Cost sharing can be imposed by a sponsor as a condition of the sponsored award, or it can be volunteered by the University. The Vice President for Research will agree to cost sharing only when required by the sponsor or in rare situations when justified by the competitive nature of the award. Cost sharing should be held to a minimum and must adhere to the sponsoring agency’s guidelines and comply with UNM Policy 2430, Cost Sharing on Sponsored Projects. Note: F&A cannot be cost shared.

1. The principal investigator must notify the chairperson or director of any external requirements for cost sharing. The PI/Chairperson will identify funds for the cost sharing requirement and prior to preparing the proposal will submit the Cost Sharing Commitment Form for consideration.
2. Submit Cost Share commitment request through the Smartsheet form: <https://app.smartsheet.com/b/form/5e81b357a32548e6b0b595f62eecec1b>

If you are using this form, you will not need to complete the PDF form and attach in Click ERA. Instead, you will upload a word Doc with the following "CS submitted through SmartSheet." This is just temporary until we update Click to make the upload voluntary.



3. Enter PI Name (person requesting cost share approval) and Email, Department Name and Banner Org Code for PI.
4. Enter Contact Name and Email, this is important, this is how your department admin will receive notifications about the request. Also, if we have questions we will reach out to the contact field.
5. Enter Funding Proposal number (FP number), funding agency and proposal title. If you do not yet have a Click funding proposal number, you can enter NA, however, please know that SPO will not upload the Cost Share approval if a FP number has not been identified. It will be the responsibility of the department to do this task.

6. Enter the Start and End Date of the effective cost share period. This can be for the budget period or the project period (i.e. 5 years).
7. Enter Department Accountant Name and Email and the Department Chairperson Name and Email. This is IMPORTANT, we will route for approval based on these fields. Please ensure email addresses are accurate or it can cause a delay in the routing process.
8. Enter the item/faculty/staff name and percent effort (if applicable) then enter commitment selection and amount.
 - a. There are three (3) fields to enter the information above. If you have more than 3, you will need to submit multiple Cost Share Commitment forms. If SPO receives feedback from departments that more than three (3) fields are needed for cost share information, SPO will add additional fields.
9. Provide justification for any cost sharing more than the required amount per sponsor requirements and/or for voluntarily cost sharing. You need to provide a strong justification if cost share is not a sponsor requirement as cost share is discouraged when not required.
10. If you have submitted a Letter of Support to the Vice President for Research to be considered and you have listed specific dollar amounts on that letter, please select “Yes” on “Are you completing this CS Commitment as part of a Letter of Support?” Once “Yes” is selected, you will need to provide the approval date of the letter of intent. Cost Share Commitment Forms are required when \$’s are requested from the department.
11. In the “File Upload” section you are required to enter a copy of the funding agency guidelines related to the cost sharing requirements and the Award Budget Sheet (ABS) showing the Cost Share \$’s. Please note that the request will not be approved without the guidelines and/or ABS attached, and an explanation or justification for the cost share.
12. After clicking “Submit” the request will be routed to the person listed in the field titled, “Dept Accountant Email” for approval.
13. After the Dept Accountant approves, the request will be routed to the person listed in the field titled, “Dept Chairperson Email” for approval
14. After the Dept Chairperson approves, it will be routed to the Sponsored Projects Office for approval

15. After the Sponsored Projects Office approves, it will route to the Vice Chancellor for Research for final approval.
16. If at any point the request is declined, the request will go back to the person listed in the "Contact Email" field. A notification will also go back to the last person that approved. (i.e. if SPO disapproves then the contact email and dept chairperson will receive a notification. If the dept chairperson disapproves, the contact email and the dept admin/accountant email will receive a notification, etc.
17. After the Vice Chancellor for Research approves the request, the approval notification will go to the "contact," "PI," "Dept Accountant," and "SPO." If a funding proposal number is indicated, the SPO admin will upload the approval request to the Click record. If no number is provided, the department will need to upload once they create the Click record. **You do not need to log in to SmartSheet to obtain the approval..the notification is the approval.**

Example Notifications

1. Approval Request to the Department Accountant

Dear Test Accountant,

Test PI Name is requesting review/approval for the Cost Share commitment requested below. Once you have approved, this will be routed for Department Chair approval. If you have questions, please contact your Department Contact listed below. If you disapprove, please note a new Cost Share Form will need to be completed.

If you have questions or concerns regarding this process, please contact HSC-PreAward@salud.unm.edu.
Thank you!

[View Request](#)

Row 1

Contact Name	Jillian Chavez
Funding Agency	Test Funding Agency
Cost Share Start Date	01/01/23
Cost Share End Date	12/31/23
% Effort	20%
Commitment Selection	FOM
Amount	25,000.00
Item/Faculty/Staff Name 2	Test Name

2. Approval Request to the Department Chairperson

Example Notifications

Dear Dr. Test Chairperson,

Your Department Accountant has reviewed/approved the Cost Share Commitment request below from Test PI Name. Once you have reviewed/approved, this will be routed to the HSC Sponsored Projects Office for pre-review prior to sending to the Vice President of Research for approval. If you have questions, please contact your Department Contact listed below. If you disapprove, please note a new Cost Share Form will need to be completed and the PI, Test PI Name, will be notified.

If you have questions or concerns regarding this process, please contact HSC-PreAward@salud.unm.edu.
Thank you!

[View Request](#)

Row 1

Contact Name	Jillian Chavez
Cost Share Start Date	01/01/23
Cost Share End Date	12/31/23
Item/Faculty/Staff Name	Jill Chavez
% Effort	20%
Commitment Selection	FOM
Amount	25,000.00
Item/Faculty/Staff Name 2	Test Name
% Effort 2	10%

3. Approval Request to SPO

Example Notifications

Dear SPO,

The below Cost Share has been approved by the Department. Once you have reviewed/approved, this will be routed for Vice President of Research approval. If you have questions, please contact the Department Contact listed below. If you disapprove, please note a new Cost Share Form will need to be completed and the PI, Test PI Name, will be notified.

Thank you!

[View Request](#)

Row 1

Contact Name Jillian Chavez

Funding Agency Test Funding Agency

Cost Share Start Date 01/01/23

Cost Share End Date 12/31/23

Item/Faculty/Staff Name Jill Chavez

% Effort 20%

Commitment Selection FOM

Amount 25,000.00

Item/Faculty/Staff Name 2 Test Name

% Effort 2 10%

4. Approval Request to VP for Research

Example Notifications

Dear Dr. Larson,

Test PI Name in Test Dept Name is requesting review/approval of the Cost Share Commitment below. This request has been approved by the Department Chair and pre-reviewed by SPO. Once you have reviewed/approved, a notification of approval will be sent to the PI and HSC SPO. If you have questions or concerns, please contact Stacy Catanach (scatanach@salud.unm.edu). If you disapprove, please note a new Cost Share Form will need to be completed by the Department. The PI and HSC SPO will be notified of the disapproval.

If you have questions or concerns regarding this process, please contact HSC-PreAward@salud.unm.edu.
Thank you!

[View Request](#)

Row 1

Contact Name	Jillian Chavez
Funding Agency	Test Funding Agency
Cost Share Start Date	01/01/23
Cost Share End Date	12/31/23
Item/Faculty/Staff Name	Jill Chavez
% Effort	20%
Commitment Selection	FOM
Amount	25,000.00
Item/Faculty/Staff Name 2	Test Name

5. Notification confirming approval



Your Cost Share Commitment for FP00005555, Test Proposal Title, from Test Funding Agency in the amount of 35000 has been APPROVED by the Vice President for Research.

Please keep this email as your approval record. You do not need to log in to SmartSheet, this is a notification only. Please note, if you have a Click funding proposal number listed, the HSC SPO has uploaded this commitment into your record. If you do not yet have a record created, you will need to upload once created.

If you have any questions, please contact HSC-PreAward@salud.unm.edu

Thank you and have a wonderful day!

Decline and Approval email examples:

Example Notifications

At each step when a request is approved, an email will go to the contact email that was provided in the form. See below examples of the notifications that will be sent out upon approval/decline of the requests.



Hello,

Your Cost Share Commitment for FP00005555, Test Proposal Title, from Test Funding Agency in the amount of 35000 has been APPROVED by your Department Chair.

This request will now be forwarded to HSC Sponsored Projects for approval.

If you have any questions, please contact HSC-PreAward@salud.unm.edu

Thank you and have a wonderful day!

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Your Cost Share Commitment for FP00005555, Test Proposal Title, from Test Funding Agency in the amount of “total” has been DISAPPROVED by the Vice President for Research. In order to submit for reconsideration, you will need to complete a new Cost Share Commitment Form. Please note, the following have been notified: PI, Dept Contact, Dept Accountant, HSC SPO.

If you have any questions, please contact HSC-PreAward@salud.unm.edu

Thank you and have a wonderful day!

Cost Share Commitment - Smartsheet Process

