

**University of Wisconsin - Milwaukee
Grants Project Desk Reference
WISPER – Create record for Gift in Kind**

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WISPER facilitates the process of routing records for Gift in Kind donations by capturing data necessary to review and report the donations as well as providing a method for obtaining electronic signatures. As the Principal Investigator, you may be the initiator of the record creation process. This document will walk you through this process. Please feel free to leave fields empty if you do not know the requested information, unless explicitly told to provide information in the instructions.

This desk reference assumes that this is the first record of its kind created kind by the PI or primary campus contact.

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CREATE NEW RECORD

1. Login:

- 1 Navigate to the WISPER login page via <https://uwm.edu/officeofresearch/wisper/>, click the “Log in to WISPER” button, and then enter your PantherID and password. You will be directed to the UW WISPER page.
- 2 Click on “My WISPER.”
- 3 Select the Create New Record button at the top of the page.

2. Enter all Data on the Create New Record page:

- 1 Enter the following key data to create the initial record:
 - a. Short Title – *a brief description of the donation*
 - b. Contact PI – *If you are not the PI, click on “Change PI on Record”. Please keep in mind that many donation are made to departments, schools and/or colleges, and may be entered under “Dean”, “Director”, or “Chair”*
 - c. Department
 - d. Sponsor – *be as complete with the name as possible. If this record is for multiple donations from multiple donors, enter “Multiple Donors”*
- 2 Click “Create Record” to open the General Information Page on which you can enter additional information

Create New Routing Form Here.

Short Title

Contact PI MORTENSEN, EVANGELINE

- Check this box to send an email to the PI notifying them that you have created this record and that they are required to sign before submission to SPO

Department Research Svcs & Administration

Dept ID 340500

*Business Unit

Sponsor MULTIPLE DONORS

Sponsor Not In List:

Navigation: UW WISPER > My WISPER > Create New Record button

GENERAL INFORMATION PAGE

Note that you now have the WISPER ID number available to you in the header. This number can be used to track this record. In addition, this record can always be found in your My WISPER page under "Records for which I am the PI." The General page captures most of the basic information about your record.

3. Basic Information:

- 1 Enter information in as many of the following fields as possible:
 - a. Official proposal title – Enter in the donation description
 - b. Start and End dates – *Enter in today's date for the begin date, and 12/31/2099 for the end date*
 - c. Proposal type – *New*
 - d. Document type – *GIK*
- 2 Note that the contact PI, department, and Sponsor also may be changed in this section.

General | Comments | Approvals | Attachments | Division Action | Terms | SPO Action | History

Record ID MIL103845 **Document Type** GIK [Wisper Help](#)
Contact PI MORTENSEN, EVANGELINE A **Sponsor Name** MULTIPLE DONORS
Short Title short description **Status** 1-In Process

[Sign the Record](#) [Route to Another Person](#) [My Worklist](#) [Search Page](#) [Print](#) [Send PI Signature Request](#)

Basic Info

Contact PI MORTENSEN, EVANGELINE A **Outside Activities Report Submitted** Yes ⓘ
[Change Contact PI](#) **Effort Requirements Met** No ⓘ

Official Proposal Title Description of the donation

Short Title short description **Proposal Type** New ▼

Administering Dept 340500 Research Svcs & Administration ⓘ **Document Type** GIK ▼

[Change Department on Record](#)

Begin Date 02/08/2010 ⓘ **End Date** 12/31/2099 ⓘ

Sponsor MULTIPLE DONORS
 Sponsor Hot in List
[Change Sponsor on Record](#)


Primary Sponsor (Optional) **Primary Sponsor Hot In List:**

[Add Related Record](#)
[Remove Related Record](#)

4. Submission Instructions:








This section is optional.

- 1 Enter the necessary data for the following fields:
 - a. UWM campus contact – *Select the person most likely to work on, be able to answer questions about, or generally facilitate the submission of the proposal.*

Submission Instructions	
Sponsor Deadline	<input type="text" value="01/31/08"/>  <input type="checkbox"/> Paper Copy to UW SPO
Submission Method	<input type="text" value="Electronic Submissior"/> <input type="text" value="Sponsor Program Number"/> <input type="text" value="Sponsor Reference Number"/>
Campus Contact	HARRIS,DAVID <input type="button" value="Change Campus Contact"/>
Campus Contact Phone	<input type="text" value="414/229-5667"/> <input type="text" value="DNH@UWM.EDU"/>
Submission Instructions	<input type="text"/>

5. Compliance:

All compliance questions must be answered before the PI will be able to sign the record. To the best of your knowledge, answer each compliance question with regards to the donation.

Compliance	
Required Clearances - Does the project involve:	
<input type="text" value="Yes"/> 	toxic, infectious or carcinogenic/mutagenic material of proven or potential hazard to humans, other animals, or to plants? Use recombinant DNA technology?
<input type="text" value="No"/> 	use of human subjects or human tissue?
<input type="text" value="No"/> 	use of vertebrate animals?
<input type="text" value="No"/> 	involve human pluripotent stem cells?
<input type="text" value="No"/> 	action involving space, remodel, or construction?
<input type="text" value="No"/> 	potential environmental impacts which require review under the Wisconsin Environmental Policy Act?
<input type="text" value="No"/> 	funding primarily dedicated to building, renovations, or equipment?
Enter Protocol Certification Details Here	

6. Personnel – Skip this section

7. Proposed Budget:

- 1 As Gift-in-Kind donations are not monetary donations, you should skip the fields related to cost or rates.
- 2 Choose “No” for the outgoing subawards dropdown menu

Proposed Budget

Direct Costs	<input type="text"/>	Cost Sharing Included	<input type="text"/>	<input type="text"/>
F & A Costs	<input type="text"/>	Cost Sharing Amount	<input type="text"/>	
Total Costs				
F & A Rate	<input type="text"/> %			
On Campus	<input checked="" type="radio"/> Yes <input type="radio"/> No			

Cost Share Comments

Outgoing Sub-agreement(s)?

Keywords

Keyword

8. Keywords: Skip this step

9. Comments tab: add any explanatory information that this Gift-in-Kind donation may need.

10. Upload Attachments:

- 1 Upload an estimate from the donor of the monetary value of this Gift-in-Kind
- 2 Upload any sort of description/spec sheet if this donation is something that may need additional information to be reviewed. For example, pieces of equipment should include a detailed description for Risk Management to review.

**** If you have a division role and are creating this record, you may skip the rest of the instructions and instead, go to the Division Action tab, and check the box at the bottom that says “override electronic signatures”. This will eliminate the need for any PI signatures or division signatures. Then, click on “submit to SPO”. You are finished.**

PRINCIPAL INVESTIGATOR SIGNATURES

Principal Investigators will be required to verify the information provided in the record prior to routing the document to OSP. This signature may be provided immediately following the initial data entry or at any time prior to submission to OSP. **In order for the PI(s) to electronically sign the record, all compliance questions must be answered.**

11. Electronically Sign for the Proposal:

- 1 If you are not the PI, click on "Sent to PI for Signature" at the top of the General Tab
- 2 If you ARE the PI, then do the following:
 - a. Click on the "Sign the Record" hyperlink at the bottom of the General page. This will open the PI Signature page.
 - b. Read the statement to which you are attesting.
 - c. Sign for the proposal by clicking the "I Sign" button.
 - d. Verify that the PI name along with the date and time appears on the Signature Page.

Principal Investigator Signature for Proposal

In signing, I certify that I am a Principal Investigator on the above referenced proposal or award and understand that by clicking on the "I Sign" button below, I agree to this text. I certify that I have identified all space, personnel, equipment and budgetary needs associated with the proposal or award, and that the proposal or award and this form are accurate and complete in all regards, including technical matters, adherence to sponsor's guidelines, budget and required clearances. I certify (1) that the information submitted within the application is true, complete and accurate to the best of the PI's knowledge; (2) that any false, fictitious, or fraudulent statements or claims may subject the PI to criminal, civil, or administrative penalties; and (3) that the PI agrees to accept responsibility for the scientific conduct of the project and to provide the required progress reports if a grant is awarded as a result of the application.

I Sign

PI Signature performed by

PI Signature Date & Time

12. Electronically Sign for the Award (also for the PI to do):

Below the Signature for Proposal is the Principal Investigator Signature for Award. As advised by your respective department and/or School/College, you have the option at this time to read and sign the award terms and conditions. In order for the PI to sign the Award signature, the Proposal signature must have already been signed.

Principal Investigator Signature for Award

I agree to disclose promptly to the University any invention, computer software or mask work (collectively, "Project Intellectual Property") made by me in whole or in part, whether solely or jointly with others, during and in the course of the Project. If Project Intellectual Property is funded in whole or in part by a federal agency or if an agreement negotiated by the University for the conduct of the Project requires the University to grant rights in Project Intellectual Property to a third party, I agree that I will, if requested, assign rights to such Project Intellectual Property to the University's designated intellectual property management organization and will execute all documents necessary to secure protection for Project Intellectual Property, and to establish the federal government's or any other party's rights therein. I confirm that I am now under no obligation to any other person or extramural sponsor which is in conflict with my responsibilities as set forth above. I agree that the University reserves the right to make and use, for educational or research purposes, any intellectual property or material made by me in whole or in part, whether solely or jointly with others, during and in the course of the Project.

I agree to be responsible for assuring that all persons participating in the Project, other than clerical or non-technical persons, prior to commencing work on the Project have signed a copy of a document agreeing to essentially the same obligations as set forth above. (PI may use either a copy of the above language or may use the universal project participant statement found at <http://www.graduateschool.uwm.edu/forms-and-downloads/researchers/intellectual-property-agreement.pdf>.)

I have read and I hereby accept the terms and conditions of any agreement negotiated by the University for the conduct of the above-referenced Project. I agree that I will comply with the provisions of and will cooperate in assuring that the University's obligations to fulfill those terms are met.

I Sign

PI Signature performed by

PI Signature Date & Time

After signing each statement, the PI name along with signature date and time will be stamped on the page as well as on the History page. The PI Signature page is only accessible to Principal Investigators; others will access the History page to verify that the signatures have been executed.

12. Route the Record:

- 1 After completion of the PI signature process, **you should follow your school/college business procedures to complete the record.** You may need to set up an approval for the chair or the director of the department.
- 2 Every department will need to **route the record to your School/College** who will also sign the record and submit it to OSP. **Click the “Route to Another Person” button at the bottom of the PI Signature page.**
- 3 Select the Route to the School/College/Division button that select those users with Division Role Authority and notifies them that the record is ready for their action.

Route Ownership of this Record

Routing note to recipient

Record currently owned by MORTENSEN, EVANGELINE A

Click here to Route to a specific person..

Route to 34-Graduate School

Cancel

At this point, you are done.

Your division people will review the potential Gift-in-Kind, approve of it, and send it to the Office of Sponsored Programs.

Once in OSP, we will review the record with Risk Management to determine if there are any issues that may come up from the potential donation.

If Risk Management determines the Gift in Kind to be acceptable and insurable, they will approve of this, and the departmental contact identified on the record (or the PI) will be notified that this Gift in Kind is acceptable.

The departmental contact should then notify OSP when the donation has been made and is on campus.

Once the donation is on campus, OSP will notify the UWM Foundation who will acknowledge the gift, and then will report the donation to the Board of Regents for formal acceptance.

Please remember that the donation will not be insured until it has been reported to the Board of Regents.