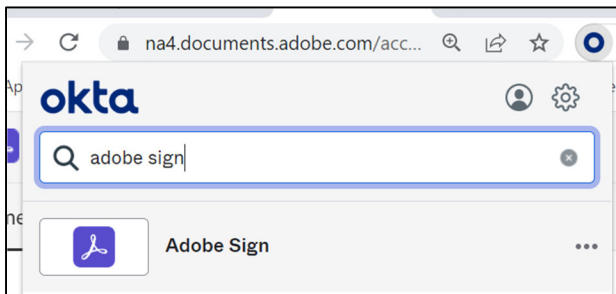
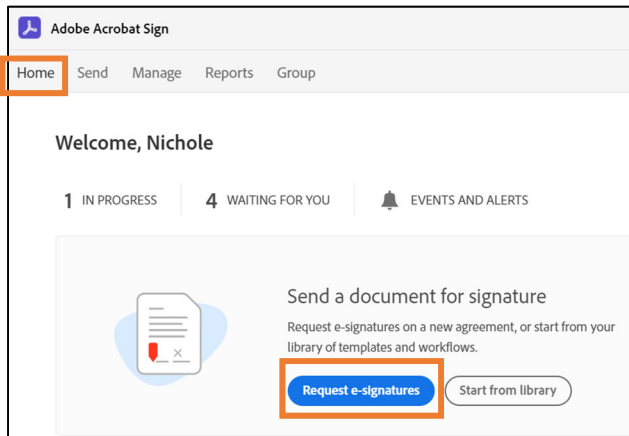


Iowa State University
Cost Share Support Request Form Instructions
Effective October 1, 2022

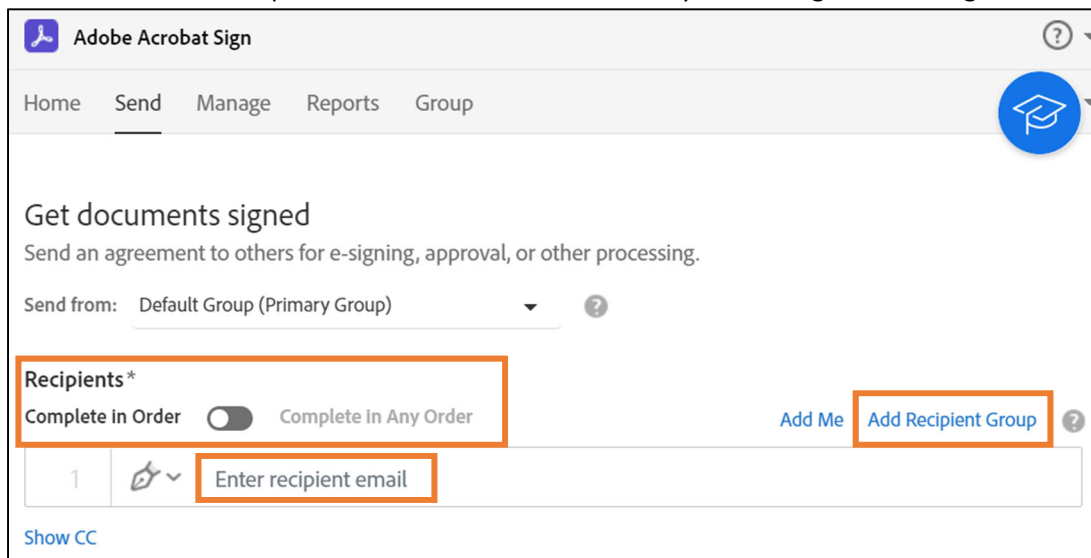
1. Open the Cost Share Support Request Form. [\(LINK\)](#)
This form can be saved as a PDF file if you need to come back to it later.
2. Fill out the Header of the request form at the top of page 1:
 - a. Enter the Date (MM/DD/YY).
 - b. Enter the Principal Investigator, Sponsor, Project Title, and Lead Unit/RRC.
 - c. Enter the Submission Deadline (MM/DD/YY).
 - d. Choose “Mandatory” or “Voluntary Committed” from the Cost Share Type drop-down box.
 - e. Choose “% Total Project Costs” or “% Total Sponsor Funds Requested” from the Cost Share Basis drop-down box.
 - f. Enter the Cost Share Basis \$ Amount. This should be either the Total Project Costs amount or the Total Sponsor Funds Requested amount based upon the selection in the Cost Share Basis field above.
 - g. Enter the Cost Share %. This MUST be entered as a decimal point.
 - h. Total Cost Share is a calculated field (Cost Share Basis \$ Amount * Cost Share % entered.)
 - i. Enter the Sponsor Funds Requested amount.
 - j. Total Project Costs is a calculated field (Total Cost Share + Sponsor Funds Requested).
3. Fill out the Body of the request form underneath the Header:
 - a. Choose the applicable Cost Share Description from the drop-down box.
 - b. Choose the applicable Source Type from the drop-down box.
 - c. Choose the applicable Funding Source from the drop-down box.
 - d. Select an ID from the ID drop-down box. (Each ID should correspond to one signature party ID in the signature section on page 2. If the same party needs to approve multiple cost share lines, choose the same ID for each of these lines, and then only list that party’s selected ID once in the Signature Section on page 2.)
 - e. Enter the cost share amounts for Years 1 – 5 as shown on the budget.
 - f. Repeat steps a – e until all cost share items and amounts are entered.
4. Fill out the Signature Section of the request form on page 2:
 - a. Select an ID for each Funding Source/ID listed on page 1.
 - b. Enter the applicable Funding Source for each ID.
5. PRINT the form as an Adobe PDF. Find the pop-up box to name the flat Adobe PDF file.
6. From Okta, sign into Adobe Sign. (If you have not yet requested Adobe Sign, click [here](#) for instructions on requesting and accessing Adobe Sign.)



7. From the Home Tab, click “Request e-signatures.”



8. From the Send tab, enter the email addresses one at a time for all of the individuals who will need to sign the form.
- Click “Add Recipient Group” to add pre-defined groups to the list; or click “Add Me” which will show on the form as “Myself.”
 - Recipients can be required to sign the document in order, or they can be allowed to sign in any order. Please note: This order does NOT impact the placement of their signature on the form.
 - The system requires at least one recipient, or the originator (i.e. “Myself”), plus one additional recipient. A form cannot be sent solely to the originator for signature.



9. Once all of the recipients’ email addresses have been entered, a message can be added to the form. (The form will auto populate with “Please review and complete this document.”)

10. Add the Cost Share Support Request Form printed in Step 5. The form can be attached by drag and drop or by clicking “Add Files.”



11. Add any additional documentation files that may be required per OVPR policy:
- a. Proposed total project costs, sponsor costs, and cost share for each budget period and a cumulative total
 - b. Facilities and Administrative (F&A) percentage rate proposed on sponsor costs and if an F&A Waiver will be requested
 - c. Proposed F&A costs to be charged to the sponsor for each budget period and a cumulative F&A total for sponsored funds requested
 - d. The required amount of mandatory cost share, with an indication of any ‘cash’ requirements or ‘in-kind’ limitations
 - e. The names of the ISU PI and Co-PIs
 - f. The salary home(s) of the ISU PI and Co-PIs, and the percentage of the salary paid by each unit (if a PI or Co-PI is paid by multiple units)
 - g. A copy of the solicitation (RFP, RFQ, BAA, proposal guidelines)
12. In the Options box, password protection, a completion deadline, or a reminder can be added as needed by selecting the desired option. (Please note: Selecting the recipient’s language will not change the language on the form itself; however, the instructions will change to the selected language.)



13. Click “Next” at the bottom of the screen, and the Cost Share Support Request Form will open.



14. If the following informational box appears, click on the 'x' to close it.

i Form fields were detected in this agreement. On each page, click the button in the top-left of the agreement view to place them.
×

Place fields

15. Signature fields must be added for each ID/Funding Source.

**Iowa State University
Cost Share Support Request Form**

Date		Cost Share Type		Mandatory	
Principal Investigator		Cost Share Basis		% Total Sponsored Funds Requested	
Sponsor		Cost Share Basis \$ Amount			
Project Title		Cost Share %		0.00%	
		Total Cost Share		\$ 0	
Lead Unit/RRC		Sponsor Funds Requested			
Submission Deadline		Total Project Costs		\$ 0	

C/Shr Description	Source Type	Funding Source ¹	ID	Yr 1 \$ Amt	Yr 2 \$ Amt	Yr 3 \$ Amt	Yr 4 \$ Amt	Yr 5 \$ Amt	Total \$ Amt
		COLLEGE OF ENGINEERING (ENGR)							\$ 0
Notes:									
									\$ 0
Notes:									
									\$ 0
Notes:									
									\$ 0.00
Notes:									
									\$ 0.00
Notes:									
									\$ 0.00
Notes:									
									\$ 0.00
Notes:									
									\$ 0.00
Notes:									
									\$ 0.00
Notes:									
									\$ 0.00
Notes:									
									\$ 0.00
Notes:									
									Total Cost Share Amount \$ 0.00

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**Iowa State University
Cost Share Support Request Form**

ID	Funding Source	Signature	ID	Funding Source	Signature
A	COLLEGE OF ENGINEERING (ENGR)				

16. Click on the Recipients drop-down box and select the signer.

RECIPIENTS
Nichole Richter (me) (Signer) ✓
Signature Fields
Signer Info Fields
Data Fields
[Reset Fields](#)
 Save as template
Sign, then Send
Back

17. Click the Signature Fields drop-down box and drag the “Signature” field to the applicable empty signature space on the form.

ID	Funding Source	Signature	ID	Funding Source
A	COLLEGE OF ENGINEERING (ENGR)	Signature		

Iowa State University
Cost Share Support Request Form

Signature Fields
Signature
Initials
Signature Block

18. Resize the signature field to fit in the space allotted.

ID	Funding Source	Signature	ID	Funding Source
A	COLLEGE OF ENGINEERING (ENGR)	Signature		

Iowa State University
Cost Share Support Request Form

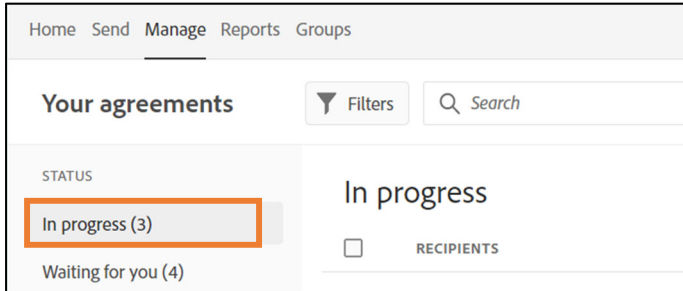
19. Repeat steps 15 – 17 until all required signature fields have been added.

20. Click the “Send” button.

More Fields
[Reset Fields](#)
 Save as template
Back **Send**

21. The form will now be emailed to the Recipients (required signatories), either in the order they were entered or all at once depending on which selection was made in Step 8b (above).

After the form is sent out for signatures, signature progress can be monitored by going to the “Manage” tab and clicking on the “In progress” status item.



Once the Cost Share Support Form is complete and fully signed, a PDF of the fully signed form should be downloaded from the “Completed” status item on the “Manage” tab and attached to the GoldSheet in Liquid Office.

