WISPER - Create record for Foundation transfers

WISPER facilitates the process of routing applications and agreements for extramural support by capturing data necessary to submit a proposal 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. If previously created records are available to copy, you should refer to the "Copy a Record" desk reference for information on how to quickly create a new record based on a previous record.

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, 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 – *If this is a supplement to an existing UWM Foundation, please put the 133 number in the short title field.*

   b.   Contact PI – *If you are not the PI, click on "Change PI on Record". Please keep in mind that many UWM Foundation accounts are under "Dean", "Director", or "Chair"*

   c.   Department

   d.   Sponsor – *Univ of Wisconsin – Milwaukee Foundation*

   2 Click "Create Record" to open the General Information Page on which you can enter additional information

Create New Records Here.

Short Title	
Contact PI	Harris, Mark

Change PI on Record

| **Department** | | **'Business Unit** UWMIL |
| **Dept ID** | | |

Add Department to Record

Sponsor

Add Sponsor to Record

☐ Sponsor Not In List:

Create Record

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
     b. Start and End dates – *UWM Foundation projects are indefinite; use 12/31/2099 for the end date*
     c. Proposal type – *New or Supplement*
     d. Document type – *Gift-UWMF*

  2. Note that the contact PI, department, and Sponsor also may be changed in this section.

4. Submission Instructions:

This section captures detailed sponsor submission instructions as well as designating a campus contact.

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.*
2. If known, note the UWM Foundation number in the Sponsor Reference Number field.

Submission Instructions

Sponsor Deadline	01/31/08
Submission Method	Electronic Submission
Campus Contact	HARRIS,DAVID
	Change Campus Contact
Campus Contact Phone	414/229-5667
	DNH@UWM.EDU
Submission Instructions	

Paper Copy to UW SPO ☐
Sponsor Program Number
Sponsor Reference Number

5. Compliance:
All compliance questions must be answered before the PI will be able to sign the record. Answer **each question by selecting NO.**

Compliance

Required Clearances - Does the project involve:

Yes	toxic, infectious or carcinogenic/mutagenic material of proven or potential hazard to humans, other animals, or to plants? Use recombinant DNA technology?
No	use of human subjects or human tissue?
No	use of vertebrate animals?
No	involve human pluripotent stem cells?
No	action involving space, remodel, or construction?
No	potential environmental impacts which require review under the Wisconsin Environmental Policy Act?
No	funding primarily dedicated to building, renovations, or equipment?

Enter Protocol Certification Details Here

6. Personnel – Skip this section

7. Proposed Budget:
   1   Enter the total amount that you want transferred from the UWM Foundation account in the
        Direct Costs field
   2   If this will be an action to take money OUT of a 133 account and transfer it back to the UWM
        Foundation account (negative notice) please leave Direct Costs field blank and explain action
        in the Comments tab.

**Please choose "No" for the outgoing subawards dropdown menu at the bottom of the page.

** 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.

8. Keywords/Comments: Skip this step

9. Upload Attachments: Skip this step

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.**

10. 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

11. 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.

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. If at any point in the process, the Division or OSP would like additional assurance regarding particular terms or the PI's ability to perform the terms, an APPROVAL should be added. (Please refer to the "Request an Approval" desk reference).

12. Route the Record:

1 After completion of the PI signature process, you will need to **route the record to your School/College** who will also sign the record and submit it to OSP for submission to the sponsor. Note that you may also need to request approval of your department chair/center director or other office per instructions from your School/College. **Click the "Route to Another Person" button at the bottom of the PI Signature page.**

2 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

Record currently owned by Harris, Mark

    Click here to Route to a specific person..

    Route to 48-College of Letters & Science

    Cancel

Note that you may also need to request approval of your department chair/center director or other office per instructions from your School/College

After routing the record you can select the Sign Out link on the top right of the page or select the MY WISPER worklist link on the bottom of the page to continue further actions.