Job Aid: Using DocuSign to Initiate Formal Request for Cost Share

1. After completion of step 1, Development of Cost Share Budget and Justification, in the Process of Obtaining Institutional Cost Share Support, send the completed Cost Share Workbook and Cost Share Budget to the Director of Research Administration (c-barrera@northwestern.edu) for review. After review, the Director will notify the RA to proceed to step 2, Formal Request of Cost Sharing Commitment.

2. Login to DocuSign and click on the Templates tab on the top of the screen.

3. Identify the template named, “Formal Request for Cost Sharing Commitment,” and click the blue “Use” button.

4. Upload the Cost Share Workbook and Cost Share Budget to the request.

5. The template includes space for 3 departments and 2 schools. The # of departments and schools will need to be adjusted to meet your specific cost share request needs. Edit the recipients within the template as follows:
   a. If using the 3 predetermined fields for department BA, add their names and emails. Delete any extra fields as required. Make sure department BAs are setup to only receive a copy, not sign.
   b. If using the 3 predetermined fields for department chairs, add their names and emails. Delete any extra fields as required. Make sure department chairs are setup to sign.
   c. If Weinberg is not included in the request delete the Weinberg RA Director and Research Dean recipients from the list.
   d. Add 3rd Research Dean as applicable.
   e. Delete any extra recipient fields as required.
   f. If additional departments or schools are needed for the route, click the “Add Recipient” button.
      i. For each added department, add department chair as signer and department BA to receive a copy. All department chairs and BAs should be setup in signing order 1, by
ii. For any additional Research Deans, add recipient and be sure to set as “Needs to Sign.” All Research Deans should be setup as signing order 2.

6. Edit the email subject line to match the details of your request.

```
Email Subject *

<Voluntary/Mandatory> Cost Share Request | <SP#> | <PI> | <Due Date>
```
7. Edit the email message to match the details of your request and add your signature.

```
Email Message

Hello,

I am writing on behalf of <PI> to request your participation in <voluntary/mandatory> cost sharing in support of the proposal <project title> which is being submitted to the <sponsor>. Please note the due date for the full submission is <date>.

The PI is requesting a total of <$> in cash cost share support and a total of <#> fellowships. The project has an estimated start date of <date> and will be for <#> years. Academic salary recovery for senior personnel is <fully/partially> recovered.

The details of this request, including department, school and OR breakdown are attached in the Cost Share Workbook.

If you have any questions, please contact <RA name> at <email>.

Sincerely,

<RA signature>
```

8. Click Next.

9. Assign the signatures to the matching location on the Cost Share Distribution page by clicking and dragging the signature icon ( ) to the fields on the Cost Share Distribution page that require department(s), dean(s), and Office for Research signature. A sample of this is below.

```
COST SHARE DISTRIBUTION

<table>
<thead>
<tr>
<th>Title:</th>
<th>0</th>
</tr>
</thead>
<tbody>
<tr>
<td>PI:</td>
<td>0</td>
</tr>
<tr>
<td>Total # of Investigators:</td>
<td>0</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Period 1</th>
<th>Period 2</th>
<th>Period 3</th>
<th>Period 4</th>
<th>Period 5</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cash Request from All Schools/Departments</td>
<td>50</td>
<td>50</td>
<td>50</td>
<td>50</td>
<td>50</td>
</tr>
<tr>
<td>Cash Request from OR</td>
<td>50</td>
<td>50</td>
<td>50</td>
<td>50</td>
<td>50</td>
</tr>
<tr>
<td>Total Investigators</td>
<td>0.0% Chemistry 50</td>
<td>50</td>
<td>50</td>
<td>50</td>
<td>50</td>
</tr>
<tr>
<td>0.0% Department Name 50</td>
<td>50</td>
<td>50</td>
<td>50</td>
<td>50</td>
<td>50</td>
</tr>
</tbody>
</table>

Enter total from Cost Share Budget

DocuSign Approval

Sign

10. Click on the sign icon ( ) and select the corresponding recipient of that signature using the drop down on the right hand side of the screen.
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11. Click Preview to review the DocuSign envelope prior to sending.
12. The template will automatically send reminders every 2 days to individuals who have not signed, however the RA should monitor progress to ensure signatures are obtained in a timely manner.