

GIFTS, GRANTS AND CONTRACTS REPORTING INSTRUCTIONS

The Gifts, Grants and Contracts summary report should be submitted electronically on an Excel workbook which is provided to each institution as an e-mail attachment. Each institution should submit the quarterly report by the 10th of the month following the quarter. Thus, the first report would be due October 10th for the first quarter of the fiscal year. The last reporting period of the fiscal year will end June 30 with a due date of July 10th.

The workbook has a worksheet tab titled “GG&C Template_Data Entry” to enter the data for that quarter of the fiscal year. The worksheet has columns A thru J. All columns must have data with the exception of Award Title and Award ID although those fields are encouraged to contain data. Please **DO NOT** insert any additional columns as the data import is done strictly on the structure of this template as is. The Regent Category and the Reporting Period columns are drop down selections. For the Business Unit field please refer to the short Business Unit name provided on the second tab “Business Unit”. This is to avoid inconsistent methods of entry in these fields. The data load is dependent on consistently formatted data.

Multi-year awards should be reported when the award document is received, not when the funds are received. If the awarding agency gives a multi-year grant but awards the entire amount in the award letter, the entire amount should be reported. If the awarding agency gives a multi-year grant but awards it only one year at a time, it should be reported one year at a time (Upward Bound, DED grants, etc.).

Student Aid should be reported when you get the award from the federal agency— do NOT report unused funds returned to other students. Pell grants are reported as they are allocated to the students. The initial Pell allocation is reported at the beginning of the year. Additional Pell allocations are reported throughout the year when they are available. The other federal student aids under Title IV (Work Study, SEOG and Perkins) are set amounts and are reported at the beginning of the year.

The **TOTAL** should include both federal awards (funds 144, 145, 146, 147 and 148) and nonfederal awards (funds 133, 134, 135, 161, 162, 233 and 533). Amounts that **should not** be included:

- Do not report Direct Loan money (Fund 149)—these are not university funds, but part of a financial aid package from the federal government to the student.
- Do not report funds (including SBDC funds from UW-Extension) from another UW institution. Only report awards from non-University of Wisconsin sources.
- Do not report WHEG, TIP, WIG, Academic Excellence awards or other financial aid funds that are awarded by HEAB to individual students that are simply received by the institution and applied to individual student accounts.

Report amounts from the university’s foundation at the time received or at the time a letter of award for specified amounts is received.

System Administration will submit quarterly reports to the Board of Regents based on the submissions from the institutions.