How to Set Up a Cost Center Number for UW Departments

This document is intended for the people who manage the funding sources for Primary Investigators for the BSC Program.

A cost center must exist for the BSC program to charge for certification, decontaminations and repairs. Cost centers are just numbers that map to a UW SFS funding string. Cost centers for BSC services take the format of EHS######.

To create a new cost center number:

- 1. Go to the website https://www.fpm.wisc.edu/administrativebilling/
- 2. Log in in the upper left hand corner using your Net ID and password, the same one used for My UW.

Https://www.fpr	n.wisc.edu/administrativebilling/	
File Edit View Favorites	Tools Help	
THE UNIVER	SITY OF WISCONSIN-MADISON	
W		Financial Management
<u> </u>	Home	
Login		Home
Recent Billing Postings		Welcome to the Financial Manag
Billing Billing Month	Date Posted Here campus customers will be able to c CORD. Transportation Services. and son	reate, view, and manage FP&M cost centers. New features include split funding, the EHS (Environmental Health & Safetv) charges.

3. Using your NetID login and password log in.

University of Wisconsin–Madison					
Campus NetID Login					
NetID					
Password	Example: bbadger				
1	Forgot your password?				

4. After logging in, navigate using the black horizontal menu bar with white lettering that runs across the top of the page. Click on My Funding

Ó	1	THE UNIVERS	ITY OF WISCOI	NSIN-MADISC	ON
W					
W		Home	My Funding	Delegation	Billing Search

5. Click on the link Create a NEW Cost Center.



6. The form will look like this:

Cost Center D	Detail				
		Fin. Contact:			
Provider:	FPM 💌	To Change Contact: Enter at least 3	characters of the Last Name, 1	lab off field, Select Name fro	m list
CC Profile:	Select a Cost Center Profile 💌		Names in list	are Madison and Extension	Only;
Cost Center:		CostCenter Type:		< Select CCType >	-
Create Fund F	Rule	Description:			
	_	Add't. Descr:			
Show/Hide Add	litional Cost Center Elements	Show/Hide Cost Center Change History	Discontinue Cost Center		
😧 Rule No. <u>S</u>	Status Requisition Funding String	\$ Limit % Begin Expire Total Billed Inval	id Split? Rule Comment		
Return					

- 7. Select FPM from the Provider dropdown box.
- 8. Select **Biosafety Cabinets (EHS)** from the CC Profile dropdown box.

Cost Center De	tail
Provider:	FPM 💌
CC Profile:	Select a Cost Center Profile 💌
Cost Center:	Select a Cost Center Profile Conversion
Create Fund Ru	Pleet Services (T) Physical Plant (B)
Show/Hide Addition	Transportation Services (TS) Safety - CORD - (SD) EHS Prof Services (EHS)
😧 Rule No. Sta	Biosafety Cabinets(EHS)
Return	

9. Enter a description, if desired. This is any text that is meaningful to you. It is particularly useful for staff managing many cost centers – all with different funding.

1			
Provider:	FPM 💌	Fin. Contact:	See All Staff
CC Profile:	Biosafety Cabinets(EHS)	To Change Contact: Enter at least	st 3 characters of the Last Name, Tab off field, Select Name from list
Cost Center:			Names in list are Madison and Extension Only;
SubCode:	BILL 💌	CostCenter Type:	BLANKET
CC Status:	Is Corrupt?	Description:	
Create Fund F	Rule	Add't. Descr:	
Click on	the Create Fun	ding Rule button	ate Fund Rule
			-

11. You will see the following:

Cost Center De	tail											
					Fin. Co	ntact:						
Provider:	FPM		-] .	To Change	e Contact:	Enter at le	ast 3 chara	acters of the La	st Name, Tab o	ff field, Select Nan	ne fro
CC Profile:	Biosafet	y Cabinet	s(EHS) 💌						Na	ames in list are N	ladison and Exter	nsion
Cost Center:					CostCente	r Type:				1	BLANKET	
Update CostCe	nter				Desc	ription:						
					Add't.	Descr:						
Show/Hide Addit	onal Cost	Center E	lements		de Cost Co	enter Char	nge History		iscontinue Cos	t Center		
😳 🛛 Rule I	No.	<u>Status</u>	Requisitio	n <u>Fundi</u>	ing String	<u>\$ Limit</u>	% Begin	Expire	Total Billed	Invalid Split?	Rule Comment	
<new rule=""></new>	• 💌)			No		
	Org	/Dept.Id	Fund	Program	Project	A	cct. Code	Bldg. #	Activity Id	Unit Nam	e	1
Funding Stri	ng *		•			-	2650			UWMSN	•	
Duration:	Start D)ate:	4/14/2015		Percent A		100	\$ Limit:		ITDPmts:		
	End Da	ate:			Rule Con	nment:						
* Required I	nformation											
Add Clos	e/Cancel											

- Enter your funding string where:
 - o Org/Dept Id: Enter a 6 digit number that represents your division and department. Required,
 - Fund is a 3 digit number. Required.
 - Program is a one digit number OR the letter F. Required.
 - Project is 7 characters in one of the formats shown below where "A" represents a number or a letter. Required.
 - PRJAAAA
 - ###AAAA where ### is your 3 digit Fund.
 - Start Date: automatically defaults to today's date but you can change it. Required.
 - End Date: Can be entered but is not required.
- Click on red control with white lettering "Add"

12. Click Return to see your Cost Center number.

To edit funding on an existing cost center:

Only the Financial Contact (or people delegated by the Financial Contact) can view and update existing cost centers.

- 1. Log on following steps 1-4 above.
- 2. Click on the pencil in the left column to display current funding details.

Cos	Cost Center							
Crea	ate a NEW Co	st Center						
Curr	ent Funding		🖲 Active 🔘 All	I	Export to Excel		Display in Pages?	
	Cost Center	Profile	Billed To Date	Description	Financial Contact	Current Funding	Additional Description	
	EHS999999	Biosafety Cabinets(EHS)	\$0.00	Test Cost Center	LastName, FirstName	Needs Funding for Future Charges		

3. You will see the following information about the cost center including all funding rules that have been created and their status – Open, Closed, or In Use. The billing program will select the lowest number funding rule where status is "Open" or "In Use" AND where the start and end dates cover the period being billed.

In order to change the funding rule:

- A. You can close any Open or In Use Rules by clicking on the Close Rule link to the left of the Rule No. Then create a new rule by clicking on plus sign surrounded by a green circle.
- B. Or you can edit any Open or In Use rules that have no end dates by updating the end date. You edit an existing rule by clicking on the pencil on the far left side of the funding rule. Enter the end date and click on Update. Then create your new rule by clicking on the plus sign surrounded by a green circle.

		Fin. Contact: LastName, FirstNa	ame	•
Provider:	FPM	To Change Contact: Enter at least	3 characters of the Last Name, T	ab off field, Select Name from list
CC Profile:	Biosafety Cabinets(EHS)		Names in list	are Madison and Extension Only;
Cost Center:	EHS999999	CostCenter Type:		BLANKET
		Description:	test cost center	
Update Cost C	Center	Add't. Descr:		
			NOT	E: This Cost Center needs funding
Show/Hide Addi	itional Cost Center Elements	Show/Hide Cost Center Change History	Discontinue Cost Center	
	tatua Dequisition Funding 6	tring \$ Limit % Bogin Expire Total Billed Inv	alid Split? Pule Comment	

For information on how a funding rule is entered see step #11 above.

Other useful information (shown below) is available on the Financial Mgmt home page. https://www.fpm.wisc.edu/administrativebilling/Home/tabid/55/Default.aspx

Helpful information for the Financial Management website

- How to Update Funding Information
- How to use Customer Billing Search
- How to use Financial Contact Delegate
- How to enter Split Funding

For assistance with anything related to cost center creation and/or billing please contact:

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