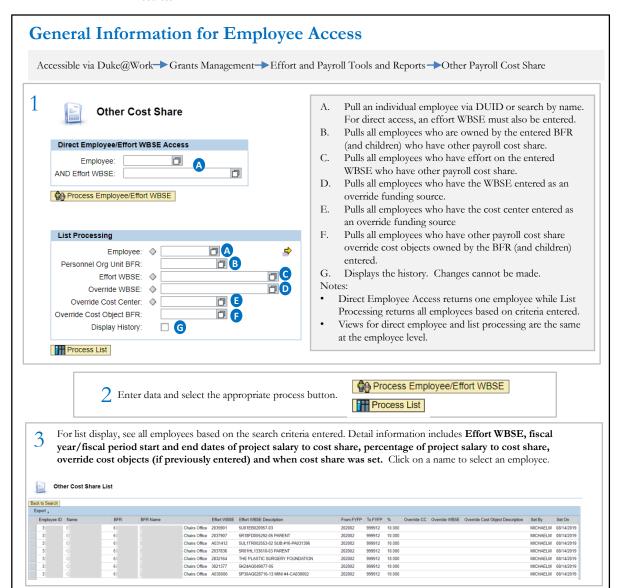**Duke** UNIVERSITY

Other Payroll Cost Share

Tool for entering and displaying payroll cost share details for all employees/projects with cost share other than what is required to comply with the Department of Health and Human Services (DHHS) Salary Cap. Additional QRGs are available for the Payroll Cost Share Funding Source tool, the Payroll Cost Share Report, and the Payroll Cost Share Change Report.
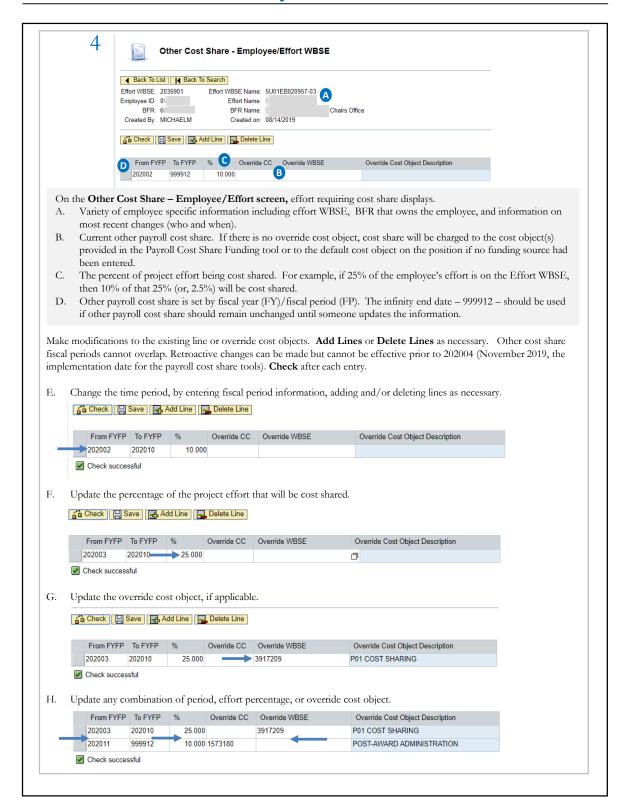
Key Points

- The Other Payroll Cost Share tool allows for the use of an override code by project for the fiscal year(FY)/fiscal period(FP) entered. The tool will not allow cost share for only base or only supplement if both are paid and post on the same day – it is both or neither.
- Cost share posts via an SAP job that runs nightly on all payroll run that day, whether monthly, biweekly, or due to a MSCT.
- Retroactive changes are picked up and posted to the ledger via an SAP nightly job and will display in reports the following day.
- Use the Payroll Cost Share Calculator for assistance with calculating the necessary cost share. .
- Limitation – you cannot change the override cost object retroactively if that is the ONLY change being made. A MSCT iForm is the only way to move existing cost shared payroll amounts between funding sources.

General Information for Employee Access

Accessible via Duke@Work ➤ Grants Management ➤ Effort and Payroll Tools and Reports ➤ Other Payroll Cost Share

1   Other Cost Share

Direct Employee/Effort WBSE Access

Employee: [____] (A)
AND Effort WBSE: [____]

👥 Process Employee/Effort WBSE

List Processing

Employee: ◇ [____] (A) ➤
Personnel Org Unit BFR: ◇ [____] (B)
Effort WBSE: ◇ [____] (C)
Override WBSE: ◇ [____] (D)
Override Cost Center: ◇ [____] (E)
Override Cost Object BFR: [____] (F)
Display History: ☐ (G)

Process List

A. Pull an individual employee via DUID or search by name. For direct access, an effort WBSE must also be entered.
B. Pulls all employees who are owned by the entered BFR (and children) who have other payroll cost share.
C. Pulls all employees who have effort on the entered WBSE who have other payroll cost share.
D. Pulls all employees who have the WBSE entered as an override funding source.
E. Pulls all employees who have the cost center entered as an override funding source
F. Pulls all employees who have other payroll cost share override cost objects owned by the BFR (and children) entered.
G. Displays the history. Changes cannot be made.

Notes:
- Direct Employee Access returns one employee while List Processing returns all employees based on criteria entered.
- Views for direct employee and list processing are the same at the employee level.

2   Enter data and select the appropriate process button.

👥 Process Employee/Effort WBSE

Process List

3   For list display, see all employees based on the search criteria entered. Detail information includes **Effort WBSE, fiscal year/fiscal period start and end dates of project salary to cost share, percentage of project salary to cost share, override cost objects (if previously entered) and when cost share was set.** Click on a name to select an employee.

Other Cost Share List

Back to Search
Export

Employee ID	Name	BFR	BFR Name		Effort WBSE	Effort WBSE Description	From FYFP	To FYFP	%	Override CC	Override WBSE	Override Cost Object Description	Set By	Set On
3	E	6		Chairs Office	2036901	5U01EB020957-03	202002	999912	10.000				MICHAELM	08/14/2019
3	E	6		Chairs Office	2037907	5R18FD005292-05 PARENT	202002	999912	10.000				MICHAELM	08/14/2019
3	E	6		Chairs Office	A031412	5UL1TR002553-02 SUB #16-PA031396	202002	999912	10.000				MICHAELM	08/14/2019
3	C	6		Chairs Office	2037836	5R01HL133618-03 PARENT	202002	999912	10.000				MICHAELM	08/14/2019
3	C	6		Chairs Office	2832164	THE PLASTIC SURGERY FOUNDATION	202002	999912	10.000				MICHAELM	08/14/2019
3	C	6		Chairs Office	3021377	5K24AG049077-05	202002	999912	10.000				MICHAELM	08/14/2019
3	C	6		Chairs Office	A030006	5P30AG028716-13 MINI #4-CA030002	202002	999912	10.000				MICHAELM	08/14/2019

Other Payroll Cost Share

4   **Other Cost Share - Employee/Effort WBSE**

◀ Back To List |◀ Back To Search

Effort WBSE: 2035901   Effort WBSE Name: 5U01EB020957-03   **A**
Employee ID: 00   Effort Name: E
BFR: 68   BFR Name: B   Chairs Office
Created By: MICHAELM   Created on: 08/14/2019

🔒 Check   💾 Save   📇 Add Line   📇 Delete Line

	From FYFP	To FYFP	%	Override CC	Override WBSE	Override Cost Object Description
D	202002	999912	10.000			

C is positioned above the % column; **B** is positioned below Override CC.

On the **Other Cost Share – Employee/Effort screen,** effort requiring cost share displays.

A.   Variety of employee specific information including effort WBSE, BFR that owns the employee, and information on most recent changes (who and when).

B.   Current other payroll cost share. If there is no override cost object, cost share will be charged to the cost object(s) provided in the Payroll Cost Share Funding tool or to the default cost object on the position if no funding source had been entered.

C.   The percent of project effort being cost shared. For example, if 25% of the employee's effort is on the Effort WBSE, then 10% of that 25% (or, 2.5%) will be cost shared.

D.   Other payroll cost share is set by fiscal year (FY)/fiscal period (FP). The infinity end date – 999912 – should be used if other payroll cost share should remain unchanged until someone updates the information.

Make modifications to the existing line or override cost objects. **Add Lines** or **Delete Lines** as necessary. Other cost share fiscal periods cannot overlap. Retroactive changes can be made but cannot be effective prior to 202004 (November 2019, the implementation date for the payroll cost share tools). **Check** after each entry.

E.   Change the time period, by entering fiscal period information, adding and/or deleting lines as necessary.

🔒 Check   💾 Save   📇 Add Line   📇 Delete Line

From FYFP	To FYFP	%	Override CC	Override WBSE	Override Cost Object Description
202002	202010	10.000			

✅ Check successful

F.   Update the percentage of the project effort that will be cost shared.

🔒 Check   💾 Save   📇 Add Line   📇 Delete Line

From FYFP	To FYFP	%	Override CC	Override WBSE	Override Cost Object Description
202003	202010	25.000			

✅ Check successful

G.   Update the override cost object, if applicable.

🔒 Check   💾 Save   📇 Add Line   📇 Delete Line

From FYFP	To FYFP	%	Override CC	Override WBSE	Override Cost Object Description
202003	202010	25.000		3917209	P01 COST SHARING

✅ Check successful

H.   Update any combination of period, effort percentage, or override cost object.

From FYFP	To FYFP	%	Override CC	Override WBSE	Override Cost Object Description
202003	202010	25.000		3917209	P01 COST SHARING
202011	999912	10.000	1573180		POST-AWARD ADMINISTRATION

✅ Check successful

Other Payroll Cost Share

5   Select **Save** to save changes. Be sure to actively manage other payroll cost share in alignment with FYFP end dates.

| | Check | | Save | | Add Line | | Delete Line |

	From FYFP	To FYFP	%	Override CC	Override WBSE	Override Cost Object Description
	202003	202010	25.000		3917209	P01 COST SHARING
	202011	999912	10.000	1573180		POST-AWARD ADMINISTRATION

☑ Check successful
☑ Data was saved

6   Select **Back to List** to work with other employees or **Back to Search** to begin a new search.

Funding Source - Employee

◀ Back To List   ◀| Back To Search

Viewing History

A history of all changes can be viewed through **List Processing** using the available search criteria. It is important to note that changes cannot be made when viewing history.

1   Enter the search criteria in **List Processing.** Select the **Display History** check box. Select **Process List.**

List Processing

Employee: ◇	
Personnel Org Unit BFR:	686
Effort WBSE: ◇	
Override WBSE: ◇	
Override Cost Center: ◇	
Override Cost Object BFR:	
→ Display History:	☑

⊞ Process List

2   **Other Cost Share** history displays all the changes for employees based on the search criteria selected.

📄 Other Cost Share History

Back to Search
Export ⌄

Employee ID	Name	BFR	BFR Name	Effort WBSE	Effort WBSE Description	From FYFP	To FYFP	%	Override CC	Override WBSE	Cost Object Description	Book	Set By	Set On	Inactive
	E		Chairs Office	2035901	5U01EB020957-03	202002	999912	10.000				1	MICHAELM	08/14/2019	X
	E		Chairs Office	2035901	5U01EB020957-03	202003	202010	25.000				2	GKH4	09/02/2019	X
	E		Chairs Office	2035901	5U01EB020957-03	202003	202010	25.000	3917209		P01 COST SHARING	3	GKH4	09/02/2019	
	E		Chairs Office	2035901	5U01EB020957-03	202011	999912	10.000	1573180		POST-AWARD ADMINISTRATION	3	GKH4	09/02/2019	

   A.   **Book:** Indicates a record has been created. A new book is created each time a change is made. The current other payroll cost share will have the highest book number.
   B.   **Set By:** NetID of the person who created the record.
   C.   **Set On:** The date the record was created.
   D.   **Inactive:** An "X" displays indicating a old record.

Ⓐ Book	Ⓑ Set By	Ⓒ Set On	Ⓓ Inactive
1	MICHAELM	08/14/2019	X
2	GKH4	09/02/2019	X
3	GKH4	09/02/2019	
3	GKH4	09/02/2019	

3   Select **Back to Search** to continue working.

📄 Other Cost Share History

Back to Search

Other Payroll Cost Share

Appendix – Additional Guidance & Resources

For guidance beyond this document, please view the videos below and consult the resources. For assistance please contact the Office of Post Award Administration at PostAwardAdmin@duke.edu.

Payroll Cost Share Online Learning	
Payroll Cost Share Funding Source	Other Payroll Cost Share

Resources	
GAP 200.140 – Cost Sharing on Sponsor Projects	Provides Duke institutional guidance on payroll cost share.
Payroll Cost Share Calculator	Provides guidance for calculating payroll cost share.
Department of Health and Human Services Salary Cap	Provides current and historic information on the DHHS Salary Cap.

Key Definition

Explanation of book: Each entry of a combination of cost share data in either tool is stored as a "book" of data. For the **Payroll Cost Share Funding Source** tool, a book is based on the All, Base or Supplemental entries for an individual (DUID). For the **Other Cost Share** tool, a book is based on the combination of an individual (DUID), a project (WBSE) and an effective period (FY/FP range). For both tools, each time changes are made to these combinations, a new book is created and the previous book is deactivated. All changes will always be stored, and using reports or the **History** view in the tools will display the current and all inactive "books" of data.