How to Use the Cost Sharing Wizard

Cost sharing occurs anytime a faculty member with salary above the NIH cap has effort on a NIH grant. The **Cost Sharing Wizard** will automatically calculate the companion account for salary accounts when the NIH over-the-cap limit is reached. In over-the-cap circumstances, a portion of a person’s salary is charged to the sponsored project and the amount over the NIH cap is charged to a companion account.

**Steps on how to use the Cost Sharing Wizard**

1. In **Wasabi**, go to **Personnel>>Data Change**.
2. Create a new JDC by clicking the green plus icon button. The {Employee} tab will be active.
3. Enter the **Effective Date** (the date the change should take effect).
4. Select the **Employee Class** (usually faculty).
5. Next to the **Action/Reason** field, use the dropdown to select “**SPH Action/Costing Change (Change to costing without a change to the job)**”.

6. Either enter the employee’s **HUID** or use the dropdown arrow to select the employee from the picklist.
7. In the **Notes** field, enter any backup information you would like to store with this action, such as sponsored justification.
8. There is no data entry on **{Job Data-1}** or **{Job Data-2}** for this type of data change, so continue to the **{Coding}** tab.

You will see the employee’s existing costing, which may include entries for “over the cap cost sharing”, or however you’ve named your companion accounts. **These companion accounts must be deleted** before using the cost sharing calculator, because the cost sharing calculation must be applied against an employee’s **full** effort. If you don’t delete these lines, Wasabi will tell you that you already have cost sharing and won’t let you proceed.
9. Click and highlight the line(s) that you want to delete, and then click on the delete shortcut (scissors icon). If there are multiple over-the-cap costing entries, do this for each line that you want to delete.

10. Adjust the Percent or Amount totals for the remaining account data, and then click on the Cost Sharing Wizard button (calculator icon).

   If the total percent of the remaining accounts does not equal 100, you will see a warning message. Wasabi will not allow you to continue until the total percent equals 100.

11. Make the adjustment so that total percent equals 100, and then click on the Cost Sharing Wizard. Wasabi tells you the total salary (including all jobs) that will be used in the calculation. Click [OK].
12. Select the Rate by clicking on the dropdown arrow and highlighting the rate that you want to use.

13. Enter the **Companion Fund Code** by clicking on the dropdown arrow to select the companion fund from the picklist or enter the fund number directly by typing it in.

14. Select **Add Missing Companion Accounts** to automatically add the companion account strings.
15. Click the [Calculate] button.
16. Wasabi will automatically calculate the over-the-cap amount and enter the account strings based on the companion account and rate that you selected/entered.

Please note: The Cost Sharing Wizard always assumes that the companion account is in the Org of the department creating the transaction. When the NIH grant is in another Org, Wasabi will create the companion account(s) using the Org of the department entering the Data Change. If the companion account is in another Org, you will need to change the Org number in the companion account string(s) that the Cost Sharing Wizard creates.

Reference Material:

OFS Internal Website/Cost Analysis

Need help - contact:
Wasabi Support