How to Read the Cost Share Summary (CSS) Report

Updated 8/23/2018

Award Information
The Budget Number, Award Name, and Start/End date are at the top of the Report:

**Cost Share Summary**

To view cost share, specify a budget or a person.

![Budget Dropdown](image)

62-1100, PROTEOME-WIDE STUDY

Start & end: 09/01/2009 through 08/31/2014  [Printable view](link)

The columns across the top of the form are explained below:

<table>
<thead>
<tr>
<th>Account</th>
<th>Description</th>
<th>Change</th>
<th>Delete</th>
<th>Type</th>
<th>% Overall</th>
<th>Start Date</th>
<th>End Date</th>
<th>% Effort</th>
<th>$ Dollars</th>
<th>% Effort</th>
<th>$ Dollars</th>
</tr>
</thead>
<tbody>
<tr>
<td>01-11</td>
<td>Villen, Judit</td>
<td>R</td>
<td></td>
<td></td>
<td>75.0%</td>
<td>07/01/2011</td>
<td>08/31/2011</td>
<td>25.3%</td>
<td>$26,327</td>
<td>25.3%</td>
<td>$26,325</td>
</tr>
</tbody>
</table>

**Account**

The Account (Object) Code selected at the time the Cost Share commitment was entered into the CSS.

**Exceptions:**

Cost Share for 3rd Party Contributions and Unrecovered Indirect Costs (UIDC) are assigned Account Numbers in the CSS that are not representative of actual expenses in the UW financial system.

- **3rd Party Cost Share** uses Account Code 03-00 which is an invalid code, as the value of the 3rd party Cost Share is never entered into the UW financial system.
- **UIDC** uses Account Code 25-99, which does not represent Indirect Costs in the UW financial system but is only used for illustrative purposes on the CSS.
The following is an example of what those two types of Cost Share Commitments look like in the CSS:

<table>
<thead>
<tr>
<th>Account</th>
<th>Description</th>
<th>Actions</th>
<th>Peroid</th>
<th>Committed</th>
<th>Actual</th>
</tr>
</thead>
<tbody>
<tr>
<td>03-00</td>
<td>ACME Supplies</td>
<td></td>
<td>12/15/2017</td>
<td>12/31/2020</td>
<td>$10,000</td>
</tr>
<tr>
<td>25-99</td>
<td>INDIRECT COST</td>
<td></td>
<td>12/15/2017</td>
<td>12/31/2020</td>
<td>$2,500</td>
</tr>
</tbody>
</table>

**Description**

The Description of the Account/Object Code or, if it is Faculty Effort (Account/Object Code 01-10), the name of the faculty member.

**Actions: Change & Delete**

These boxes only appear for users with administrative rights. This is where a Cost Share commitment can either be Changed or Deleted.

**Type**

The **Type of Cost Share Commitment**:

- M – Mandatory
- R – Committed (or Voluntary)
- SS - Shift

The following **types of Cost Share** are no longer entered into the CSS system. There may be some old Awards in the system that still have these types identified but the CSS is no longer used for these:

- C - Salary Cap
- K - K Award

**% Overall**

Only used for Faculty Effort Cost Share. This is the percentage (%) of effort committed for the Cost Share Commitment period. This column will be blank for Cost Share that is not Faculty Effort.

**Period (Start Date & End Date)**

The start and end dates for the commitment of the Faculty Effort Cost Share. If the Commitment is for the entire period of the Award then the start and end dates will be the same as the Award Start and End dates. The Commitment Period can be less if the Faculty is only committing to Cost Share for a shorter period within the Award period. Cost Share commitment periods can never be longer than the Award period.
Committed (% Effort & $ Dollars)
For Faculty effort, the % Effort column is populated. Faculty Effort and all other transactions list the dollar amount of the Commitment. See “How to Read the CSS for Faculty Effort” below for more information on why, for Faculty Effort, the “% Overall” and the “% Effort” columns may not match.

Actual (% Effort & $ Dollars)
The actual Cost Share Contribution as entered into the CSS. For Faculty Effort it is recorded as both a percentage of time (% Effort) and equivalent dollar amount ($ Dollar) for that allocation of time, regardless if the Cost Share Commitment is % Effort or $ Dollar.

Notes
A notes field is at the bottom of the page for GCA to record any information specific to this Cost Share Commitment. This field can be viewed by all users but notes can only be added staff with Administrative rights to the Cost Share Summary system (e.g., GCA, MAA, PAFC).

Determining the Amount and Type of Cost Share Commitment
For Faculty Effort, a Cost Share Commitment can be made as either:
- A fixed dollar amount ($ Dollar); or
- A percentage of effort for Faculty Effort (% Effort).

The Type of the Faculty Effort Commitment, if any, is entered when the Cost Share Commitment is established in the CSS. The Type of Commitment is displayed in bold font. The amount displayed in bold font is the amount of Cost Share that must be Contributed (or met) by the end date of the Award.

For example:
A fixed dollar commitment of $25,000:
A percentage of effort commitment of 10%:

<table>
<thead>
<tr>
<th>Account</th>
<th>Description</th>
<th>Change</th>
<th>Delete</th>
<th>Type</th>
<th>% Overall</th>
<th>Start Date</th>
<th>End Date</th>
<th>% Effort</th>
<th>Dollars</th>
<th>% Effort</th>
<th>Dollars</th>
</tr>
</thead>
<tbody>
<tr>
<td>01-11</td>
<td>Hawn, Thomas</td>
<td>M</td>
<td></td>
<td>M</td>
<td>10.0%</td>
<td>12/15/2017</td>
<td>12/31/2020</td>
<td>60.9%</td>
<td>$149,157</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

All other Cost Share Commitments are expressed in dollar amounts ($ Dollar). For example:

<table>
<thead>
<tr>
<th>Account</th>
<th>Description</th>
<th>Change</th>
<th>Delete</th>
<th>Type</th>
<th>% Overall</th>
<th>Start Date</th>
<th>End Date</th>
<th>% Effort</th>
<th>Dollars</th>
<th>% Effort</th>
<th>Dollars</th>
</tr>
</thead>
<tbody>
<tr>
<td>05-00</td>
<td>SUPPLIES AND MATERIALS</td>
<td>△</td>
<td>X</td>
<td>M</td>
<td></td>
<td>12/15/2017</td>
<td>12/31/2020</td>
<td></td>
<td>$1,760</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Totals: $1,760 50
Totals for commitments only: $1,760 50

How to Read the CSS for Faculty Effort:
The following example will be used for this description:

<table>
<thead>
<tr>
<th>Account</th>
<th>Description</th>
<th>Change</th>
<th>Delete</th>
<th>Type</th>
<th>% Overall</th>
<th>Start Date</th>
<th>End Date</th>
<th>% Effort</th>
<th>Dollars</th>
<th>% Effort</th>
<th>Dollars</th>
</tr>
</thead>
<tbody>
<tr>
<td>01-11</td>
<td>KING, MARY-CLAIRE</td>
<td>△</td>
<td>R</td>
<td>R</td>
<td>11.3%</td>
<td>09/01/2016</td>
<td>08/31/2018</td>
<td>45.2%</td>
<td>$111,165</td>
<td>23.8%</td>
<td>$58,358</td>
</tr>
<tr>
<td>01-11</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>07/01/2016</td>
<td>12/31/2016</td>
<td>7.5%</td>
<td>$18,461</td>
<td>7.5%</td>
<td>$18,160</td>
</tr>
<tr>
<td>01-11</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>01/01/2017</td>
<td>06/30/2017</td>
<td>11.3%</td>
<td>$27,843</td>
<td>11.3%</td>
<td>$27,753</td>
</tr>
<tr>
<td>01-11</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>07/01/2017</td>
<td>12/31/2017</td>
<td>11.3%</td>
<td>$27,754</td>
<td>5.0%</td>
<td>$12,444</td>
</tr>
<tr>
<td>01-11</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>01/01/2018</td>
<td>06/30/2018</td>
<td>11.3%</td>
<td>$27,754</td>
<td>3.8%</td>
<td>$9,352</td>
</tr>
<tr>
<td>01-11</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>07/01/2018</td>
<td>12/31/2018</td>
<td>3.8%</td>
<td>$9,352</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Totals: $111,165 58,358
Totals for commitments only: $111,165 58,358

A: Cost Share Commitment amount is 11.3% of the person’s effort.
B: The Start and End Date of the Cost Share Commitment period. This is typically the Award period but can be shorter if the Cost Share commitment period is less than the Award period. The Commitment period can never be longer than the Award period.
C: The Cost Share periods, listed by the faculty’s FEC “cycle” within the Cost Share commitment period. The cycles are on either the Calendar (six month) or Academic (quarterly) cycle based faculty member’s home department (not that of the Award’s department). The two cycles are:

1. Calendar (used by the School of Medicine, Public Health, Dentistry, Pharmacy)
   - January 1 – June 30
   - July 1 – December 31
2. Academic (all schools except those listed above):
   • September 16 – March 15 (Autumn & Winter quarters)
   • March 16 – September 15 (Spring & Summer quarters)

Commitments are pro-rated for those Cycles that are not complete (less than six months) within the Cost Share Commitment Period. For example, the Cost Share Commitment period starts on 9/1/2016 which is after the applicable cycle starts on 7/1/2016. Thus, the effort calculation is pro-rated, to 7.5% as the Cost Share Commitment period is shorter than that cycle.

The Dollar amounts in this section are calculated based on the amount of calculated effort and the person’s Institutional Base Salary (IBS). Both the % Effort and the $ Dollar fields are calculated regardless if the Cost Share Commitment is Effort- or Dollar-based.

D. The sum of the Cost Share Commitment Efforts and Dollar amounts. This calculation is so that a comparison can be made of the total commitment and Actual Contributions to date. In this example, the Committed amount is the sum of the five periods (7.5% + (11.3% x 3) + 3.8%) = 45.2%. The department must meet the Cost Share Commitment of 45.2% of the Faculty’s effort.

E. The Total Actual to Date Contributed so users can track the total commitment to the actuals to date. In this example, three of the cycles have been reported on (7.5% + 11.3% + 5.0% = 23.8%). The Cost Share Commitment, which in this example is Effort-based, will be met when the total Actual Effort is equal to the Committed Effort (45.2%) on this report. The two lines that are blank are for periods that have yet to be completed.

When the Committed Effort is Less than the Overall Effort
There are cases where the sum of the Effort for the pro-rated cycles is less than the Cost Share Commitment effort. In the example below, the Cost Share Commitment is 20% (“% Overall”) but because the Cost Share Commitment period (1/1/2018 – 3/31/2018) is shorter than the cycle period, the total Cost Share Effort (9.9%) is less than the Commitment amount (20%).

Start & end: 12/15/2017 through 12/31/2020  

<table>
<thead>
<tr>
<th>Account</th>
<th>Description</th>
<th>Action</th>
<th>Period</th>
<th>Committed</th>
<th>Actual</th>
</tr>
</thead>
<tbody>
<tr>
<td>01-11</td>
<td>Hawn, Thomas</td>
<td></td>
<td>01/01/2018 - 03/31/2018</td>
<td>9.9%</td>
<td>$24,157</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>01/01/2018 - 06/30/2018</td>
<td>9.9%</td>
<td>$24,157</td>
</tr>
<tr>
<td>Totals</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>$24,157</td>
</tr>
<tr>
<td>Totals for commitments only</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>$0</td>
</tr>
</tbody>
</table>

Printable view