How an ADR can look like

<table>
<thead>
<tr>
<th>Fund</th>
<th>WBS Element</th>
<th>Grant</th>
<th>Start &amp; End Dates</th>
<th>Description</th>
<th>Salary Wage FYTD</th>
<th>%age</th>
<th>Cost Sharing</th>
<th>Adj %age</th>
</tr>
</thead>
<tbody>
<tr>
<td>4XXXXXX</td>
<td>525XXXXX320</td>
<td>525XXXXX3</td>
<td>09/01/2011 - 08/31/2016</td>
<td>Professorship</td>
<td>66,813.31</td>
<td>28.89%</td>
<td>-58,441.39</td>
<td>3.62</td>
</tr>
<tr>
<td>525XXXXX</td>
<td>525XXXXX321</td>
<td>525XXXXX3</td>
<td>09/01/2011 - 08/31/2016</td>
<td>5 R01 XX000003-20</td>
<td>9,142.68</td>
<td>3.95%</td>
<td>2,513.22</td>
<td>5.04</td>
</tr>
<tr>
<td>525XXXXX</td>
<td>525XXXXX321</td>
<td>525XXXXX3</td>
<td>09/01/2011 - 08/31/2016</td>
<td>5 R01 XX000003-21</td>
<td>45,297.80</td>
<td>19.59%</td>
<td>11,848.51</td>
<td>24.71</td>
</tr>
<tr>
<td>525XXXXX</td>
<td>525XXXXX321</td>
<td>525XXXXX3</td>
<td>09/01/2011 - 08/31/2016</td>
<td>5 R01 XX000003-30</td>
<td>36,155.13</td>
<td>15.63%</td>
<td>9,450.91</td>
<td>19.72</td>
</tr>
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<td>525XXXXX</td>
<td>525XXXXX321</td>
<td>525XXXXX3</td>
<td>09/01/2011 - 08/31/2016</td>
<td>5 R01 XX000003-40</td>
<td>18,285.35</td>
<td>7.91%</td>
<td>4,563.92</td>
<td>9.88</td>
</tr>
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<td>525XXXXX</td>
<td>525XXXXX321</td>
<td>525XXXXX3</td>
<td>09/01/2011 - 08/31/2016</td>
<td>5 R01 XX000003-31</td>
<td>5 R01 XX000004</td>
<td>19.72%</td>
<td>13,064.83</td>
<td>24.03</td>
</tr>
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<td>525XXXXX3</td>
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**How to complete the cost sharing column:** Go to slide 2
**How to complete the ADJ % age column:** Go to slide 3
**Extra tips:** Go to slides 5 and 6
**Example of an ADR:** Go to slide 6
HELP ME WITH MY ADR!

HOW TO COMPLETE THE COST SHARING COLUMN

Calculating the MANDATORY COST SHARING AMOUNT =

Mandatory Cost Sharing amount =

\[
\text{Effort on the grant period} \times \frac{\text{# pay periods of that funding period in the FY}}{\text{total # pay periods in the FY}} \times (\text{Real Salary} - \text{Sponsor salary cap})
\]

If you don’t the effort on the grant period, but know which salary cap was used, you can figure it out. See slide 4.
HELP ME WITH MY ADR!

HOW TO COMPLETE THE Adj % age COLUMN

Calculating the Adj % age = ratio of \[ \frac{\text{(salary wage + cost sharing amount)}}{\text{Annual IBS}} \times 100 \] and also = annual effort average of the PI on the grant associated with the WBS account or fund on that line

\[
\text{Adj % age} = \frac{\text{Salary Wage charged to the WBS/ fund}}{\text{Total Base Salary}} + \frac{\text{Cost sharing amount associated to the WBS/ fund}}{\text{Total Base Salary}}
\]

And that should give you the same result:

\[
\text{Adj % age} = \frac{\text{Effort on the grant period}}{\text{Total # pay periods in the FY}} \times \frac{\text{# pay periods of that funding period in the FY}}{\text{Total # pay periods in the FY}}
\]

If you don’t know that look at slide 4
How to find the effort on the grant period from the Salary cap used on the WBS account?

Effort on the grant period = \frac{\text{total # pay periods in the FY} \times \text{Salary wage charged on that period}}{\text{# pay periods of that funding period in the FY} \times \text{Sponsor salary cap on that period}}
HELP ME WITH MY ADR!

**Extra tips**

1. The **cost sharing column** dollars amounts should add up to $0, considering that all your mandatory cost sharing amounts should come from a discretionary fund (and not a federal fund) and that should be clear. (See arrow 1 on the ADR example on slide 6)

2. Make sure that the % indicated in the “Adj % age” column is not below the minimum effort that the PI should be reporting to the NIH based on the calculation “salary wage / NIH salary cap”. (See arrow 2 on the ADR example on slide 6).

3. Your last Adj% age column should add up to **100%** (See arrow 3 on the ADR example on slide 6).

4. For **effort compliance**, your faculty members absolutely need to have at LEAST 2% effort paid from a fund, or even 10% if they are chairman, as per our Effort policy. (See arrow 4 on the ADR example on slide 6)

5. If your faculty did some **Voluntary cost sharing** (by charging the whole cost of their effort to a discretionary fund) you need to add a line with that information (See arrow 5 on the ADR example on slide 6)
How an ADR can look like

All arrows number reference tips from slide 5

$36,155.13 / $184,200 = 19.628 %

Because this ADR is from FY 16
NIH Salary cap until 01/09/2016 = $183,300
NIH salary cap after 01/10/2016 = $185,100
NIH salary cap average on the FY 16 = $184,200

By Helene Brazier-Mitouart, Education Manager, October 2018