

SPAR with Mandatory Cost Sharing and Voluntary Cost Sharing – Different Account

Facts related to this Scenario:

- SPAR Period is September 1 – December 31
- Initial Actual effort distribution is 60% to department, 25% to Project 405246 (a non-Cap Account) and 15% to Project 405405 (a Cap Account) with related cost sharing, for entire SPAR period
- Institutional Base Salary (IBS) exceeds salary cap
- Must modify to include Voluntary Cost Sharing (VCS) on Project 405246 for the 8% difference between the Actual effort devoted to this project and the level of salary funded by the sponsor.

Project 405246 is not a Cap Account. Therefore, there is no MCS requirement on this project. The regular Voluntary Cost Sharing line will be allowed to have a value greater than 0% in the Dist% column.

Person Info											
Emp Number	144031	Full Name	SPAR10, Faculty J			SPAR No.		Start Period		End Period	
SPAR Info											
SPAR No.	483169	SPAR Suffix	3	Start Period	SEP-12	End Period	DEC-12	Pay Year Type	12/12	Dept	
Reason for SPAR	LD % Change - Certification Required					<input type="checkbox"/> Recert Overriden					
Effort Reporting and Distribution											
New	Line No	Start Date	End Date	Account Number			Actual%	Dist%	Cap Acct	CS Ind	
<input checked="" type="checkbox"/>	1	01-SEP-2012	31-DEC-2012	02.22291.5100.00000.000000.01000.00000.N			60.00	66.01	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	2	01-SEP-2012	31-DEC-2012	05.22291.5100.00000.405246.01000.00000.N			25.00	25.00	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	3	01-SEP-2012	31-DEC-2012	05.22278.5100.00000.405405.01000.00000.M			12.00	8.99	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	4	01-SEP-2012	31-DEC-2012	05.22278.5100.00000.405405.01000.00000.V			3.00	.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>									<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>									<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>									<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>									<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>									<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>									<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>									<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>									<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>									<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>									<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>									<input type="checkbox"/>	<input type="checkbox"/>	
Cost Sharing for Effort Reporting											
New	Line No	Start Date	End Date	Account Number			CS%				
<input checked="" type="checkbox"/>	1.01	01-SEP-2012	31-DEC-2012	05.22278.5100.00000.405405.01000.00000.M			3.01				
<input type="checkbox"/>	1.02	01-SEP-2012	31-DEC-2012	05.22278.5100.00000.405405.01000.00000.V			3.00				
<input type="checkbox"/>											

Detailed Steps:

1. Click on the account number field on line 2 and change the N cost share code to a V. The modification is not allowed. A system message will appear in the lower left corner of the screen. The account number field is restricted from modification once the SPAR is saved.

FRM-40200: Field is protected against update.

Record: 2/4

2. A new line will be required to record the Actual effort and related VCS for this project. Change the Actual% on line 2 from 25% to 0% to effectively end this distribution.
3. Click on the New box on line 5 to open the new line pop up box.

Effort Reporting and Distribution - Line# 5

Add Percentages

Start Date Account Number

End Date Actual Effort Percentage

OK Cancel

- TIP: It is possible to cut and paste, or use Control C and Control V to create a line using an account number already entered..
 - TIP: If you see a yellow box reading "Entity.Department.Subcode.Purpose.Project.Reference.Unspecified.Cost_Share_Code" press the tab key to remove it.
4. Confirm Start and End Dates are the same as those on original project line 2.
 5. Enter the account number for project 405246 with a V cost share code.

Cost Allocation Flexfield

Entity	05	Sponsored Projects
Department	22291	Instruction & Learning
Subcode	5100	Non-Medical Faculty RFT Regular Earnings
Purpose	00000	Default-No Value
Project	405246	Writing Project
Reference	01000	
Unspecified	00000	Default-No Value
Cost Share Code	V	Voluntary

OK Cancel Clear Help

Cost Share Code

Find %

Flex_Value	Description
K	K-Award
M	Mandatory
N	Not Applicable
O	Other
V	Voluntary

Find OK Cancel

6. Enter 25% Actual Effort Percentage and click OK to transfer the data to line 5.

Person Info
 Emp Number 144031 Full Name SPAR10, Faculty J SPAR No. Start Period End Period

SPAR Info
 SPAR No. 483169 SPAR Suffix 3 Start Period SEP-12 End Period DEC-12 Pay Year Type 12/12 Dept
 Reason for SPAR LD % Change - Certification Required Recert Overriden

Effort Reporting and Distribution

New	Line No	Start Date	End Date	Account Number	Actual%	Dist%	Cap Acct	CS Ind
<input type="checkbox"/>	1	01-SEP-2012	31-DEC-2012	02.22291.5100.00000.000000.01000.00000.N	60.00	66.01	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	2	01-SEP-2012	31-DEC-2012	05.22291.5100.00000.405246.01000.00000.N	.00	.00	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	3	01-SEP-2012	31-DEC-2012	05.22278.5100.00000.405405.01000.00000.M	12.00	8.99	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	4	01-SEP-2012	31-DEC-2012	05.22278.5100.00000.405405.01000.00000.V	3.00	.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	5	01-SEP-2012	31-DEC-2012	05.22291.5100.00000.405246.01000.00000.V	25.00	25.00	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>							<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>							<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>							<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>							<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>							<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>							<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>							<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>							<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>							<input type="checkbox"/>	<input type="checkbox"/>

Cost Sharing for Effort Reporting

New	Line No	Start Date	End Date	Account Number	CS%
<input type="checkbox"/>	1.01	01-SEP-2012	31-DEC-2012	05.22278.5100.00000.405405.01000.00000.M	3.01
<input checked="" type="checkbox"/>	1.02	01-SEP-2012	31-DEC-2012	05.22278.5100.00000.405405.01000.00000.V	3.00
<input type="checkbox"/>					

- The SPAR still indicates 25% in the Dist% column for Project 405246. A VCS joint line is needed to align the salary dollars charged to the project to the sponsor budget. Verify that the Start and End Dates of the regular project line and the intended recipient line are in agreement.
- Highlight line 1 to identify the department account as the recipient line. Click the next available New box in the Cost Sharing for Effort Reporting section to create the joint line.

Cost Sharing for Effort Reporting - Line # 1.03

Add Percentages

Start Date 01-SEP-2012 Account Number

End Date 31-DEC-2012 C. Shared Percentage

OK Cancel

9. The Start and End Dates will be populated with the dates on the recipient line.
10. Enter the account number for Project 405246 with a V cost share code.
11. Enter 8% in the C. Shared Percentage field and click OK to transfer the data to line 1.03.
12. Note that the Dist% fields on both the recipient line 1 and sponsored project line 5 have been updated to reflect the voluntary cost sharing. The salary distributed to the award is at the budget level of 17%.

Person Info

Emp Number Full Name SPAR No. Start Period End Period

SPAR Info

SPAR No. SPAR Suffix Start Period End Period Pay Year Type Dept

Reason for SPAR Recert Overriden

Effort Reporting and Distribution

New	Line No	Start Date	End Date	Account Number	Actual%	Dist%	Cap Acct	CS Ind
<input type="checkbox"/>	1	01-SEP-2012	31-DEC-2012	02.22291.5100.00000.000000.01000.00000.N	60.00	74.01	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	2	01-SEP-2012	31-DEC-2012	05.22291.5100.00000.405246.01000.00000.N	.00	.00	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	3	01-SEP-2012	31-DEC-2012	05.22278.5100.00000.405405.01000.00000.M	12.00	8.99	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	4	01-SEP-2012	31-DEC-2012	05.22278.5100.00000.405405.01000.00000.V	3.00	.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	5	01-SEP-2012	31-DEC-2012	05.22291.5100.00000.405246.01000.00000.V	25.00	17.00	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>							<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>							<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>							<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>							<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>							<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>							<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>							<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>							<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>							<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>							<input type="checkbox"/>	<input type="checkbox"/>

Cost Sharing for Effort Reporting

New	Line No	Start Date	End Date	Account Number	CS%
<input checked="" type="checkbox"/>	1.01	01-SEP-2012	31-DEC-2012	05.22278.5100.00000.405405.01000.00000.M	3.01
<input type="checkbox"/>	1.02	01-SEP-2012	31-DEC-2012	05.22278.5100.00000.405405.01000.00000.V	3.00
<input type="checkbox"/>	1.03	01-SEP-2012	31-DEC-2012	05.22291.5100.00000.405246.01000.00000.V	8.00
<input type="checkbox"/>					

13. Click Refresh/New Pct button and confirm that all months are 100%.

Mon-Year	Actual%	Dist%
SEP-2012	100.00	100.00
OCT-2012	100.00	100.00
NOV-2012	100.00	100.00
DEC-2012	100.00	100.00

14. Press the Save-Modify button to save these changes.



15.. The system message indicates that the save was successful and has assigned suffix #4.