

Detailed Steps:

1. Modify the End Dates on lines 1, 2 and 1.01 to Oct 31. This is necessary to end the current cost share relationship so that a new relationship can be created starting November 1 to include the new sponsored project.
2. Click the New box on line 3 to create a new department line. Enter Start Date of Nov 1 and End Date of Dec 31. Place cursor in the Account Number field and click on the three dots to access the account number drop down box. Enter the department account number and click OK.
 - TIP: It is possible to cut and paste, or use Control C and Control V to create the account number from line 1.
 - TIP: If you see a yellow box reading “Entity.Department.Subcode.Purpose.Project.Reference.Unspecified.Cost_Share_Code” hit the tab key to remove it.

Field	Value	Description
Entity	02	Operating
Department	22291	Instruction & Learning
Subcode	5100	Non-Medical Faculty RFT Regular Earnings
Purpose	00000	Default-No Value
Project	000000	Default-No Value
Reference	00000	Default-No Value
Unspecified	00000	Default-No Value
Cost Share Code	N	Not Applicable

Buttons: OK, Cancel, Clear, Help

3. Actual Effort Percentage is 50%, representing the former 80% department effort minus the 30% to be applied to the new sponsored project. Enter 50% in the Actual Effort Percentage field and click OK to transfer data to line 3.
4. Click the New box on line 4 to create a line to reflect the activity for the existing sponsored project #119254 through the end of the SPAR period. Start and End Dates should be populated with the dates from the preceding line of Nov 1 and

Dec 31. Enter the account number with an M cost share code and the Actual Effort Percentage of 20. Click OK to transfer data to line 4.

Effort Reporting and Distribution - Line# 4

Add Percentages

Start Date Account Number

End Date Actual Effort Percentage

5. To complete the required three line cost sharing relationship, a joint line must be created. Highlight the department line 3 to identify it as the cost share recipient. With line 3 highlighted, click the New box on line 2 of the Cost Sharing for Effort Reporting section of the SPAR screen.

6. The Start and End Dates of the joint line pop up box are populated with the dates of the recipient line. Enter the sponsored project account number with the M cost share code. Place the cursor in the C. Shared Percentage field and click Calc MCS to calculate the mandatory cost shared percentage required. Click OK to transfer the data to line 3.01.

Cost Sharing for Effort Reporting - Line # 3.01

Add Percentages

Start Date Account Number

End Date C. Shared Percentage

7. Return to the Effort Reporting and Distribution section of the SPAR screen and click the New box on line 5 to create the line for the new sponsored project #406448. The dates are populated with those from the preceding line and agree

with the period of this project. Enter the sponsored project account number and Actual Effort Percentage of 30%. Click OK to transfer the data to line 5.

- A check appears in the Cap Acct column indicating that this sponsored project is subject to a sponsor imposed salary cap. Also, the value in the Dist% column is not equal to the Actual% value. The Dist% value represents the maximum distribution of salary allowable on this project based on the level of Actual effort.

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-OCT-2012	02.22291.5100.00000.000000.01000.00000.N	80.00	81.28	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	2	01-SEP-2012	31-OCT-2012	05.22278.5100.00000.119254.01000.00000.M	20.00	18.72	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	3	01-NOV-2012	31-DEC-2012	02.22291.5100.00000.000000.01000.00000.N	50.00	51.28	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	4	01-NOV-2012	31-DEC-2012	05.22278.5100.00000.119254.01000.00000.M	20.00	18.72	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	5	01-NOV-2012	31-DEC-2012	05.22278.5100.00000.406448.01000.00000.M	30.00	28.08	<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"/>
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<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-OCT-2012	05.22278.5100.00000.119254.01000.00000.M	1.28
<input checked="" type="checkbox"/>	3.01	01-NOV-2012	31-DEC-2012	05.22278.5100.00000.119254.01000.00000.M	1.28
<input type="checkbox"/>					

- Click the Refresh/New Pct button. Dist% is less than 100% for the months of November and December because the system has restricted the amount allowable on the sponsored project and no cost share entry has been made.

Percentages by Month

SPAR No SPAR Suffix

Mon-Year	Actual%	Dist%
SEP-2012	100.00	100.00
OCT-2012	100.00	100.00
NOV-2012	100.00	98.08
DEC-2012	100.00	98.08

Close

10. To satisfy the MCS requirement, a joint line must be created to establish the cost share relationship for the new sponsored project, #406448.
11. To create the joint line, highlight the department account on line 3 to identify it as the cost share recipient line and establish the link with the joint line. Make sure the Start and End Dates on the recipient line are consistent with those on the sponsored project line. With the recipient line highlighted, click the New box in the Cost Sharing for Effort Reporting Section.
 - TIP: All cost share relationships must include three component lines, the regular sponsored project line, the regular cost share recipient line, and the joint line. All of these lines must have the exact same Start and End Dates.
 - TIP: The regular sponsored project line and the joint line must have the exact same account number including the cost share code.

- A cost share recipient line may be related to more than one sponsored project account but each set of project and joint lines just have Start and End Dates consistent with the recipient line.

12. Start and End dates are populated with those of the recipient line and are not subject to modification.

13. Enter the sponsored project account number with an M cost share code.

14. Place the cursor in the C. Shared Percentage box. Automatically, the Calc MCS button appears. Click this button to have the box populated with the required percentage of cost sharing. Click OK to transfer the data entered to the new joint line.

15. The Dist% field of the recipient account has been automatically updated to reflect the cost sharing relationship. The recipient line reflects the addition of the MCS % to the Actual effort resulting in a higher Dist% to the departmental account.

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-OCT-2012	02.22291.5100.00000.000000.01000.00000.N	80.00	81.28	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	2	01-SEP-2012	31-OCT-2012	05.22278.5100.00000.119254.01000.00000.M	20.00	18.72	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	3	01-NOV-2012	31-DEC-2012	02.22291.5100.00000.000000.01000.00000.N	50.00	53.20	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	4	01-NOV-2012	31-DEC-2012	05.22278.5100.00000.119254.01000.00000.M	20.00	18.72	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	5	01-NOV-2012	31-DEC-2012	05.22278.5100.00000.406448.01000.00000.M	30.00	28.08	<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"/>
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<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-OCT-2012	05.22278.5100.00000.119254.01000.00000.M	1.28
<input type="checkbox"/>	3.01	01-NOV-2012	31-DEC-2012	05.22278.5100.00000.119254.01000.00000.M	1.28
<input type="checkbox"/>	3.02	01-NOV-2012	31-DEC-2012	05.22278.5100.00000.406448.01000.00000.M	1.92
<input type="checkbox"/>					

16. Click the Refresh/New Pct button to verify 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

17. Click the Save – Modify button.

Spar # 483085 successfully modified and saved! - new suffix is # 3