SPAR with Mandatory Cost Sharing and Voluntary Cost Sharing – Same 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 405405 for the 3% difference between the Actual effort devoted to this project and the level of salary funded by the sponsor.

Project 405405 is a Cap Account indicating that the sponsor is DHHS. Therefore this project already has a Mandatory Cost Share (MCS) requirement, meaning that any salary charged to this project account must be reduced to the cap level. Because the SPAR application cannot make more than one Dist% calculation per line, MCS and VCS must be recorded on separate regular and joint lines on the SPAR form. Further, because we cannot distribute any salary to the project that has not been reduced to the cap level, all VCS lines on the SPAR must reflect 0 Dist%. This is accomplished by entering the same values for Actual% and CS%.

Person Info

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

SPAR Info

SPAR No. 483169 SPAR Suffix 2 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
	1	01-SEP-2012	31-DEC-2012	02.22291.5100.00000.000000.01000.00000.N	60.00	63.76	☐	☑
	2	01-SEP-2012	31-DEC-2012	05.22291.5100.00000.405246.01000.00000.N	25.00	25.00	☐	☐
	3	01-SEP-2012	31-DEC-2012	05.22278.5100.00000.405405.01000.00000.M	15.00	11.24	☑	☐
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Cost Sharing for Effort Reporting

New	Line No	Start Date	End Date	Account Number	CS%
	1.01	01-SEP-2012	31-DEC-2012	05.22278.5100.00000.405405.01000.00000.M	3.76

Detailed Steps:

1. Click the New box on line 4 to create a new regular line for the DHHS project.

Effort Reporting and Distribution - Line# 4

Add Percentages

Start Date	01-SEP-2012	Account Number	
End Date	31-DEC-2012	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" hit the tab key to remove it.

2. Verify that the Start and End Dates are for the full SPAR period.

3. Enter the Project Account Number including a V cost share code.
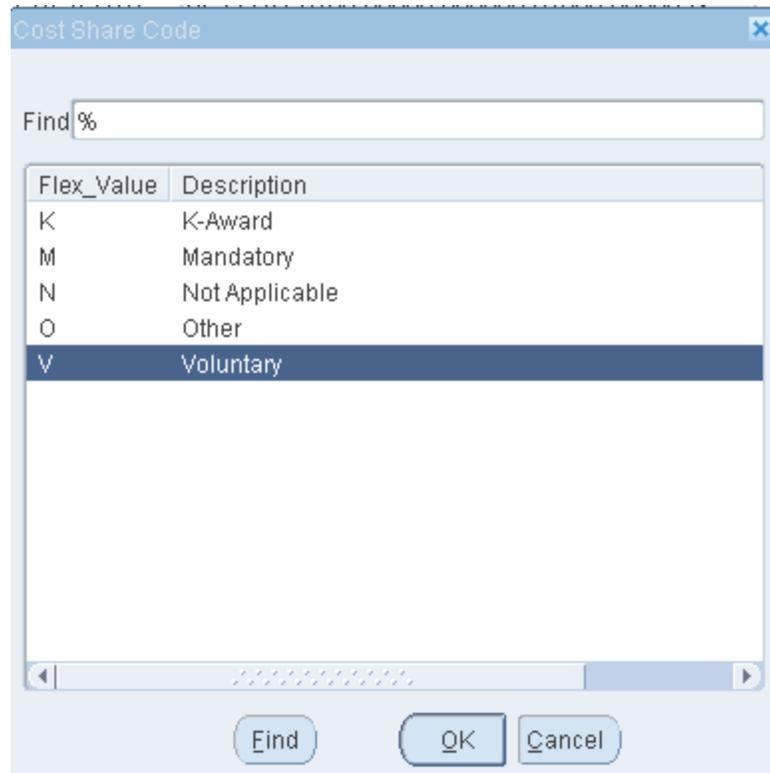
4. Enter Actual Effort Percentage of 3%, the amount of the unfunded salary and click OK to transfer the data entered to the new line 4.

Person Info

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

SPAR Info

SPAR No. 483169   SPAR Suffix 2   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
	1	01-SEP-2012	31-DEC-2012	02.22291.5100.00000.000000.01000.00000.N	60.00	63.76	☐	☑
	2	01-SEP-2012	31-DEC-2012	05.22291.5100.00000.405246.01000.00000.N	25.00	25.00	☐	☐
	3	01-SEP-2012	31-DEC-2012	05.22278.5100.00000.405405.01000.00000.M	15.00	11.24	☑	☐
	4	01-SEP-2012	31-DEC-2012	05.22278.5100.00000.405405.01000.00000.V	3.00	3.00	☑	☐
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Cost Sharing for Effort Reporting

New	Line No	Start Date	End Date	Account Number	CS%
	1.01	01-SEP-2012	31-DEC-2012	05.22278.5100.00000.405405.01000.00000.M	3.76

5. Press the Refresh/New Pct button to find that the monthly Actual% and Dist% totals are 103%.

Percentages by Month

SPAR No 483169   SPAR Suffix 2

Mon-Year	Actual%	Dist%
SEP-2012	103.00	103.00
OCT-2012	103.00	103.00
NOV-2012	103.00	103.00
DEC-2012	103.00	103.00

Close

6. To balance this SPAR and properly state actual effort for this Project, click on the Actual% field on line 3 and reduce the value from 15% to 12%.

7. Again, press Refresh/New Pct to verify that all months are in balance.

8. Dist% is still out of balance. This out of balance situation is caused by the change to actual effort on line 3 without manually updating the CS% on the related joint line, 1.01. Joint lines automatically calculate MCS when the line is entered. Any subsequent modifications to the CS% directly or the Actual% on the related regular project line requires manual recalculation by pressing the Refresh Shared Pcts button in the Cost Sharing for Effort Reporting section. Press Refresh Shared Pcts.

Person Info

Emp Number 144031   Full Name SPAR10, Faculty J   SPAR No. [ ]   Start Period [ ]   End Period [ ]

SPAR Info

SPAR No. 483169   SPAR Suffix 2   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
	1	01-SEP-2012	31-DEC-2012	02.22291.5100.00000.000000.01000.00000.N	60.00	63.01	☐	☑
	2	01-SEP-2012	31-DEC-2012	05.22291.5100.00000.405246.01000.00000.N	25.00	25.00	☐	☐
	3	01-SEP-2012	31-DEC-2012	05.22278.5100.00000.405405.01000.00000.M	12.00	8.99	☑	☐
	4	01-SEP-2012	31-DEC-2012	05.22278.5100.00000.405405.01000.00000.V	3.00	3.00	☑	☐
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							☐	☐
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Cost Sharing for Effort Reporting

New	Line No	Start Date	End Date	Account Number	CS%
	1.01	01-SEP-2012	31-DEC-2012	05.22278.5100.00000.405405.01000.00000.M	3.01

Percentages by Month

SPAR No 483169   SPAR Suffix 2

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

Close

9. Note that the CS% and Dist% fields have been updated and the SPAR is in balance.

10. Press the Save button.

Forms

Cap eligible grant accounts must be cost shared to save changes

OK

11. This message informs the user that the Voluntary line must be cost shared with a Dist% value of 0%. No save will be allowed if a value other than 0% is in the Dist% column of a Cap Account line with a V cost share code.

12. A joint line must be created to record the voluntary cost shared effort. Highlight line 1 to identify it as the cost share recipient account. Click the New box on the next available line in the Cost Sharing for Effort Reporting section of the SPAR screen.

Cost Sharing for Effort Reporting - Line # 1.02

Add Percentages

Start Date 01-SEP-2012   Account Number _____

End Date 31-DEC-2012   C.Shared Percentage _____   Calc MCS

OK   Cancel

13. Confirm that the Start and End Dates agree to the recipient line and the regular sponsored project line.

14. Enter the sponsored project account number with a cost share code of V and the cost shared percentage of 3%. Click OK to transfer the data to the new joint line.

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

16. Click Save-Modify. The system message indicates that the save was successful and has assigned suffix #3.

17. Click OK and the SPAR Suffix field in the SPAR Info section updates to 3.

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
	1	01-SEP-2012	31-DEC-2012	02.22291.5100.00000.000000.01000.00000.N	60.00	66.01	☐	☑
	2	01-SEP-2012	31-DEC-2012	05.22291.5100.00000.405246.01000.00000.N	25.00	25.00	☐	☐
	3	01-SEP-2012	31-DEC-2012	05.22278.5100.00000.405405.01000.00000.M	12.00	8.99	☑	☐
	4	01-SEP-2012	31-DEC-2012	05.22278.5100.00000.405405.01000.00000.V	3.00	.00	☑	☐
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							☐	☐

Cost Sharing for Effort Reporting

New	Line No	Start Date	End Date	Account Number	CS%
	1.01	01-SEP-2012	31-DEC-2012	05.22278.5100.00000.405405.01000.00000.M	3.01
	1.02	01-SEP-2012	31-DEC-2012	05.22278.5100.00000.405405.01000.00000.V	3.00

This is the final screen shot of the example of recording Mandatory and Voluntary cost sharing on a Cap Account.