

Transfer/Change Report

Only SPARQ users who have been designated as grantee administrators have the ability to access and use the Transfer/Change Report.

1. Click on the [Transfer/Change](#) link under **System Tools** on the [SPARQ Home](#) page. The system will display the **Participant Transfer/Change Transaction Summary** screen.

Participant Transfer/Change Transaction Summary

* Donor/Recipient Grantee:

Donor/Recipient Sub-Grantee:

Status:

* Required Field.

2. Select the appropriate grantee and click . The system will display the **Participant Transfer/Change Report** screen.

Participant Transfer/Change Report

Donor Recipient Grantee: Example Recipient

Effective Date From (mm/dd/yyyy):

Effective Date To (mm/dd/yyyy):

Transaction Date From (mm/dd/yyyy):

Transaction Date To (mm/dd/yyyy):

Status:

3. Enter the criteria upon which you wish to filter. If you want to see transfers that were effective during a certain range, use the first set of date fields. If you want to see those that were processed during a certain range, use the second set of date fields. For example, to see a list of records that were transferred as part of the PY12 transition, enter "10/1/2012" in "Effective Date From" and "Effective Date To" and select "Processed" from the "Status" dropdown.

Then click **GENERATE REPORT**.

(Note: If you are using a version of Internet Explorer that precedes version IE9, hold down the "Ctrl" key on the keyboard before you click **GENERATE REPORT**. Keep holding down the "Ctrl" key while SPARQ generates the report.)

The screenshot shows a web form titled "Participant Transfer/Change Report". It contains several input fields and a dropdown menu. The fields are: "Donor Recipient Grantee:" with the value "Example Recipient"; "Effective Date From (mm/dd/yyyy):" with the value "10/1/2012"; "Effective Date To (mm/dd/yyyy):" with the value "10/1/2012"; "Transaction Date From (mm/dd/yyyy):" which is empty; "Transaction Date To (mm/dd/yyyy):" which is empty; and "Status:" with a dropdown menu showing "Processed". At the bottom of the form is a button labeled "GENERATE REPORT".

3. After the report generates, a window will appear that allows you the choice of either opening or saving a csv file. (Note: A csv file can be opened with Excel). After selecting one of those options (opening the file or saving a csv file), release the "Ctrl" key and proceed as usual. The file will display the following fields:

- Donor Grantee Code
- Donor Grantee Acronym
- Donor Sub-grantee Code
- Donor Sub-grantee Name
- Recipient Grantee Code
- Recipient Grantee Acronym
- Recipient Sub-grantee Code
- Recipient Sub-grantee Name
- Effective Date
- Transfer/Change Status
- Error Reason
- Created By
- Transaction Date
- Transfer Reverse
- PID
- Last Name
- Donor County of Residence
- Donor County of Authorized Position
- Durational Limit Date