



FUNDAMENTAL SPREADSHEET APPLICATIONS (230)

REGIONAL – 2016

TOTAL POINTS _____ (*650 points*)

**Judge/Graders: Please double check and verify all
scores and answer keys!**

Property of Business Professionals of America.
May be reproduced only for use in the Business Professionals of America
Workplace Skills Assessment Program competition.



RUBRIC

ON EACH ITEM CONTESTANTS EARN EITHER ALL THE POINTS OR NONE EXCEPT FOR TYPOS.

Printout 1 Worksheet—Job 1	Possible Points	Total Points
ITEM NO entered as a label, not a value (aligned left)	10	
Heading AMT changed to AMOUNT	10	
Main heading is merged and centered across columns of information	20	
Amount for each item is correct	20	
1 st subtotal is correct	10	
Tax amount is correct	10	
Shipping amount is correct	10	
2 nd subtotal is correct	10	
Discount is correct	10	
TOTAL is correct and is in bold	20	
Column headings are centered	10	
Printed with gridlines, column and row headings, and centered on page	30	
Total Points, Printout 1	170	
Printout 2—Job 1 with Formulas Showing	Possible Points	Total Points
AMOUNT column formula correct	20	
1 ST subtotal formula correct	20	
Tax formula is correct	20	
Shipping formula is correct	20	
2 nd subtotal formula correct	20	
Discount formula is correct	20	
Total formula is correct	20	
Printed showing formulas on one page	20	
Total Points, Printout 2	160	

FUNDAMENTAL SPREADSHEET APPLICATIONS - REGIONAL 2016

ANSWER KEY



Printout 3 Worksheet—Job 2	Possible Points	Total Points
Title is correct and is merged and centered above columns of information	20	
Subtitle is correct and is merged and centered above columns of information	20	
Data is entered correctly and formatted correctly	20	
Asset projections are done correctly (-5 points each error)	30	
Liability projections are done correctly (-5 points each error)	30	
Total Assets amounts correct and Total Liabilities amounts correct	20	
Net Worth amounts are correct	20	
Printed without gridlines showing and fit to one page	10	
Total Points, Printout 3	170	
Printout 4 Formulas—Job 2	Possible Points	Total Points
Total Assets formula correct	10	
Total Liabilities formula correct	10	
Net Worth formula correct	10	
Printed on one page	10	
Total Points, Printout 4	40	
Printout 5—Job 2 Chart	Possible Points	Total Points
3-D clustered column chart created	20	
Chart shows projected Total Assets, Total Liabilities, and Net Worth for years 2015-2018	30	
Chart is titled correctly	20	
Legend is placed on the right	20	
Chart created on new sheet	20	
Total Points, Printout 5	110	
Total Points	650	

FUNDAMENTAL SPREADSHEET APPLICATIONS - REGIONAL 2016
ANSWER KEY

Page 4 of 7

Printout 1



	A	B	C	D	E	F
1	INVOICE					
2						
3	ITEM NO	QUANT	UNIT	DESCR	UNIT PRICE	AMOUNT
4	163344	5	EA	SCANNERS	\$129.99	\$649.95
5	164401	2	DOZ	FLASH DRIVES	\$8.99	\$17.98
6	153342	10	EA	MONITORS	\$125.89	\$1,258.90
7	151401	6	EA	SPEAKERS	\$85.66	\$513.96
8						
9				SUBTOT		\$2,440.79
10				TAX		\$146.45
11				SHIPPING		\$244.08
12				SUBTOT		\$2,831.32
13				DISC		\$56.63
14				TOTAL		\$2,774.69

Printout 2

	A	B	C	D	E	F
1	INVOICE					
2						
3	ITEM NO	QUANT	UNIT	DESCR	UNIT PRICE	AMOUNT
4	163344	5	EA	SCANNERS	129.99	=E4*B4
5	164401	2	DOZ	FLASH DRIVES	8.99	=E5*B5
6	153342	10	EA	MONITORS	125.89	=E6*B6
7	151401	6	EA	SPEAKERS	85.66	=E7*B7
8						
9				SUBTOT		=SUM(F4:F7)
10				TAX		=F9*0.06
11				SHIPPING		=F9*0.1
12				SUBTOT		=SUM(F9:F11)
13				DISC		=F12*0.02
14				TOTAL		=F12-F13



**Professional Business Associates Financial Services
Financial Review for Julie and James Jones**

		2014	2015	Projected 2016	2017	2018
Assets						
	Home Equity	\$17,375.00	\$19,250.00	\$21,125.00	\$23,000.00	\$24,875.00
	Car 1	\$6,500.00	\$5,500.00	\$4,500.00	\$4,500.00	\$4,500.00
	James' and Julie's Income	\$101,500.00	\$103,530.00	\$105,600.60	\$107,712.61	\$109,866.86
	401K	\$42,750.00	\$47,750.00	\$52,750.00	\$57,750.00	\$62,750.00
	Savings	\$3,100.00	\$3,000.00	\$3,000.00	\$3,000.00	\$3,000.00
	<u>TOTAL ASSETS</u>	\$171,225.00	\$179,030.00	\$186,975.60	\$195,962.61	\$204,991.86
Liabilities						
	Visa 1	\$3,640.00	\$2,500.00	\$1,000.00	\$0.00	\$0.00
	Visa 2	\$1,875.00	\$500.00	\$0.00	\$0.00	\$0.00
	Other Credit Cards	\$255.00	\$0.00	\$0.00	\$0.00	\$0.00
	Mortgage Payments for the Year	\$13,620.00	\$13,620.00	\$13,620.00	\$13,620.00	\$13,620.00
	Car 2 Payments for the year	\$3,900.00	\$3,900.00	\$3,900.00	\$3,900.00	\$3,900.00
	Utility Payments for the year	\$5,100.00	\$5,100.00	\$5,100.00	\$5,100.00	\$5,100.00
	Contributions to 401K	\$5,000.00	\$5,000.00	\$5,000.00	\$5,000.00	\$5,000.00
	Other Liabilities	\$1,200.00	\$1,200.00	\$1,200.00	\$1,200.00	\$1,200.00
	<u>TOTAL LIABILITIES</u>	\$34,590.00	\$31,820.00	\$29,820.00	\$28,820.00	\$28,820.00
	<u>NET WORTH</u>	\$136,635.00	\$147,210.00	\$157,155.60	\$167,142.61	\$176,171.86

FUNDAMENTAL SPREADSHEET APPLICATIONS - REGIONAL 2016

ANSWER KEY



Professional Business Associates Financial Services
Financial Review for Julie and James Jones

	2014	2015	2016	Projected 2017	2018
Assets					
Home Equity	17375	=C7+1875	=D7+1875	=E7+1875	=F7+1875
Car 1	6500	=C8-1000	=D8-1000	=E8	=F8
James' and Julie's Income	101500	=C9*1.02	=D9*1.02	=E9*1.02	=F9*1.02
401K	42750	=C10+5000	=D10+5000	=E10+5000	=F10+5000
Savings	3100	3000	3000	3000	3000
TOTAL ASSETS	=SUM(C7:C11)	=SUM(D7:D11)	=SUM(E7:E11)	=SUM(F7:F11)	=SUM(G7:G11)
Liabilities					
Visa 1	3640	2500	1000	0	0
Visa 2	1875	500	0	0	0
Other Credit Cards	255	0	0	0	0
Mortgage Payments					
for the Year	=12*1135	=12*1135	=12*1135	=12*1135	=12*1135
Car 2 Payments					
for the year	=12*325	=12*325	=12*325	=12*325	=12*325
Utility Payments					
for the year	=12*425	=12*425	=12*425	=12*425	=12*425
Contributions to 401K	5000	5000	5000	5000	5000
Other Liabilities	1200	1200	1200	1200	1200
TOTAL LIABILITIES	=SUM(C16:C23)	=SUM(D16:D23)	=SUM(E16:E23)	=SUM(F16:F23)	=SUM(G16:G23)
NET WORTH	=C12-C24	=D12-D24	=E12-E24	=F12-F24	=G12-G24



Julie and James Jones, Projected Net Worth 2015-2018

