

**Controller's Office – Grants and Funds Management**

**Time and Effort Reporting – Employee**

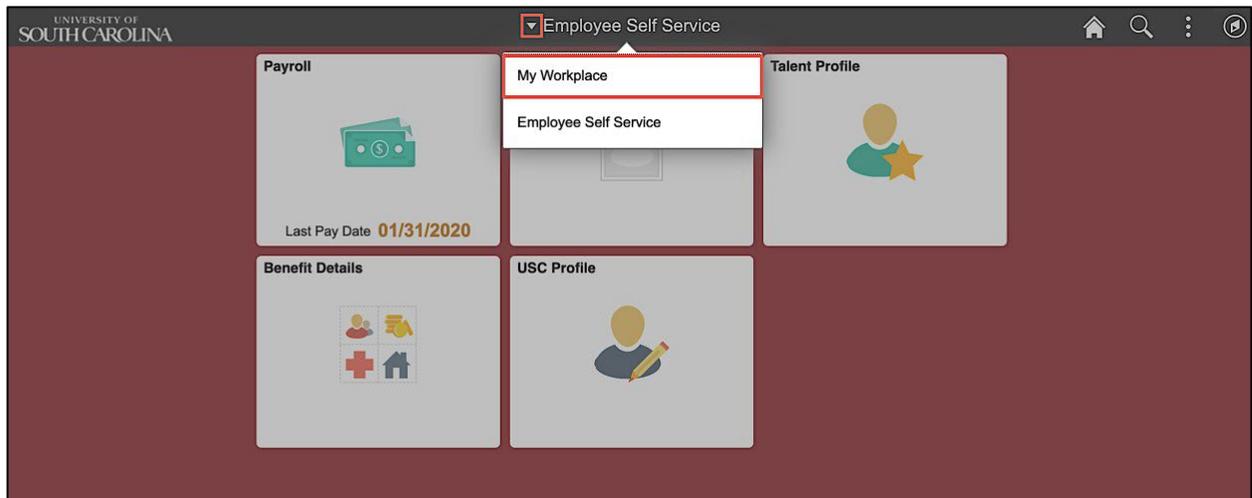
**I. Navigation in HCM PeopleSoft (<https://hcm.ps.sc.edu/>)**

To view the Time and Effort home screen navigate to:

***Employee Self Service > My Workplace/My Homepage > Grant Time and Effort***

**Step 1:** Click the **Employee Self Service** drop-down arrow.

**Step 2:** Click the **My Workplace** or **My Homepage** option from the list.



**Step 3:** Click the **Grant Time & Effort** tile.



## II. Verifying and Releasing Time and Effort Report eForms

It is now time for you to certify and acknowledge the payroll percentages identified on a Time and Effort eForm reasonably reflect your effort.

If you have questions regarding your Time and Effort Report, please contact your Business Manager. If unable to connect with a Business Manager, contact the Controller's Office by emailing [GFMECERT@mailbox.sc.edu](mailto:GFMECERT@mailbox.sc.edu).

**Step 1:** Click the **Certify a Grant Report** tab.

**Step 2:** Click the **Search** button.

The screenshot shows the 'Account' page with a sidebar on the left containing navigation options: 'Grant Time & Effort Forms', 'Update a Grant Report', 'Certify a Grant Report' (highlighted in green), and 'View a Grant Report'. The main area is titled 'Account' and contains a search form with the following fields: 'Form ID', 'Employee Name', 'Reporting Period', 'Primary Department', 'Form Status', 'Form Type', and 'Empl ID'. Each field has a 'Begins With' dropdown menu and a text input field. A 'Search' button is highlighted in red, and a 'Clear' button is also visible.

**Step 3:** The eForm page automatically opens indicating there is only one report available for you to certify. If there are multiple forms, they will populate below the search criteria section of the page.

Please note more forms may appear if you are listed as the PI or Supervisor for a report that has been routed to you for certification.

The screenshot shows the 'Form Page' for a 'Time and Effort Reporting : Time and Effort Report' with Form ID 141510. The page is divided into sections: 'Employee Information' and 'Sponsored Accounts'. The 'Employee Information' section includes fields for Employee Name, Empl ID, Primary Department (155401 MECHANICAL ENGINEERING), Reporting Period (Go-Live Catch-up 2019), Report Period Begin Date (04/01/2019), and Report Period End Date (12/31/2019). A 'Hide Chartfields' button is also present. The 'Sponsored Accounts' section contains a table with 4 rows of data. The table has columns for Certified?, Earnings, Percent of Pay, Details, Project/Grant, Department, Cost Share, and Op Unit/Dept/Fund/Acct/Class. The 'Certified?' column has radio buttons for 'No'. The 'Subtotal' is 106579.25 and the 'Percent Subtotal' is 58.88.

Certified?	Earnings	Percent of Pay	Details	Project/Grant	Department	Cost Share	Op Unit/Dept/Fund/Acct/Class
<input type="radio"/> No	20086.00	11.10	<a href="#">Details</a>	10008119 Work Activity 202C21: Rapid In	155400		CL040 155400 F1000 51300 202
<input type="radio"/> No	22573.99	12.47	<a href="#">Details</a>		155001	10008115 Work Activity 202C18: Progress	CL040 155001 A0001 51300 101
<input type="radio"/> No	18104.66	10.00	<a href="#">Details</a>		155001	10008116 Work Activity 202C19: High Ene	CL040 155001 A0001 51300 101
<input type="radio"/> No	45814.60	25.31	<a href="#">Details</a>		155001	10008118 Work Activity No 202C20: Rapid	CL040 155001 A0001 51300 101

Subtotal 106579.25  
Percent Subtotal 58.88

Now let's begin reviewing and certifying each distribution line.

**Step 4:** Review the earnings and percent of pay charged to each distribution during the reporting period. If you need additional information, click the **Details** button to view the pay periods included in the distribution.

**Line Detail**

Department MECHANICAL ENGINEERING RESEARCH  
Chartstring CL040 155400 F1000 51300 202

Earnings End Date	Check Date	Empl Rcd	Earn Code	Earnings
06/15/2019	08/15/2019	1	SMR	20086.00

**Step 5:** If you feel the percentage identified on Distribution Line 1 reasonably reflects your effort, click the **Certify** button to toggle to **Yes**.

Continue to review and certify all remaining Distribution Lines.

Certified?	Earnings	Percent of Pay	Details	Project/Grant	Department	Cost Share	Op Unit/Dept/Fund/Acct/Class
<input checked="" type="radio"/> Yes	20086.00	11.10	Details	10008119 Work Activity 202C21: Rapid In	155400		CL040 155400 F1000 51300 202
<input type="radio"/> No	22573.99	12.47	Details		155001	10008115 Work Activity 202C18: Progress	CL040 155001 A0001 51300 101
<input type="radio"/> No	18104.66	10.00	Details		155001	10008116 Work Activity 202C19: High Ene	CL040 155001 A0001 51300 101
<input type="radio"/> No	45814.60	25.31	Details		155001	10008118 Work Activity No 202C20: Rapid	CL040 155001 A0001 51300 101

Subtotal 106579.25  
Percent Subtotal 58.88

Step 6: Click the **View Approval Routing** button to see the approval workflow.

The screenshot shows a web interface titled "Form Page". At the top, there is a navigation bar with a home icon, a search icon, and a menu icon. Below the navigation bar is a table with the following columns: "Certified?", "Earnings", "Percent of Pay", "Details", "Project/Grant", "Department", "Cost Share", and "Op Unit/Dept/Fund/Acct/Class". The first row of the table has the following values: "1", "Yes", "79766.75", "44.07", a "Details" button, "155001", and "CL040 155001 A0001 51300 101". Below the table, there are summary statistics: "Subtotal 79766.75", "Percent Subtotal 44.07", "Total 180982.78", and "Percent Total 100.00". A "View Approval Routing" button is highlighted with a red box. Below the summary statistics, there is a section for "File Attachments" with a table that has columns: "Status", "Action", "Description", "File Name", and "Remove". The first row of the table has the following values: "1", "Upload", an empty field, an empty field, and "Delete". Below the "File Attachments" section, there is a section for "Action Items" with a table that has columns: "Status", "Action", "Description", "File Name", and "Remove". The first row of the table has the following values: "1", "No", an empty field, an empty field, and "Delete". Below the "Action Items" section, there is a section for "Acknowledgement" with a table that has columns: "Status", "Action", "Description", "File Name", and "Remove". The first row of the table has the following values: "1", "No", an empty field, an empty field, and "Delete". Below the "Acknowledgement" section, there is a section for "Comments" with a table that has columns: "Status", "Action", "Description", "File Name", and "Remove". The first row of the table has the following values: "1", "No", an empty field, an empty field, and "Delete". At the bottom of the page, there is a user profile for "OVD, TIFFANY" with buttons for "Search", "Recycle", "Hold", "Print", and "Approve".

Step 7: Click the **Cancel** button to return to the form page.

The screenshot shows the same "Form Page" as in Step 6, but with a modal window titled "Current Approval Routing" open. The modal has a "Cancel" button highlighted with a red box. Below the "Cancel" button, there is a section for "Review/Edit Approvers" with a "Pending" status. Below this, there is a "Basic Path" section with a "Pending" status and an "Employee Cpid" field. Below the "Basic Path" section, there is a "Parallel Stage" section with four rows of data: "G3FORM\_ID=195456, PROJECT\_ID=10008115", "G3FORM\_ID=195456, PROJECT\_ID=10008116", "G3FORM\_ID=195456, PROJECT\_ID=10008118", and "G3FORM\_ID=195456, PROJECT\_ID=10008119", all with an "Initiated" status. Below the "Parallel Stage" section, there is a "Supervisor Stage" section with a "G3FORM\_ID=195456" and an "Awaiting Further Approvals" status. The background of the page is dimmed, showing the same table and summary statistics as in Step 6.

**Step 8:** When all Distribution Lines on the Time and Effort report are certified, acknowledge the reported effort is reasonably reflected. To do this, click the **Acknowledgement** button to toggle to **Yes**.

*Please note your certification or acknowledgement will not populate until all lines are certified.*

**Step 9:** Click the **Comments** drop-down arrow to view the comment box. Click in the Comments box to enter an appropriate comment. These comments will be visible to **all** who can view the eForm. A comment is only required if the form is recycled.

**Step 10:** Click the **Approve** button to complete your certification.

The screenshot displays the 'Form Page' interface for an eForm. At the top, there are navigation tabs: 'Account', 'Certified?', 'Earnings', 'Percent of Pay', 'Details', 'Project/Grant', 'Department', 'Cost Share', and 'Op Unit/Dept/Fund/Acct/Class'. Below these, a table shows a single row with a 'Yes' toggle, '79766.75' for Earnings, '44.07' for Percent of Pay, and a 'Details' button. Summary statistics include a Subtotal of 79766.75 and a Percent Subtotal of 44.07. A section for 'Total Qualifying Accounts' shows a Total of 180982.78 and a Percent Total of 100.00, with a 'View Approval Routing' button. The 'File Attachments' section contains a table with one row for an 'Upload' action. The 'Action Items' section includes an 'Acknowledgement' row with a 'Yes' toggle and a text box containing the certification statement. Below this is a 'Comments' section with a text box containing 'This appears reasonable to me. Thank you.'. At the bottom, the user's name 'OYD, TIFFANY' is displayed, along with buttons for 'Search', 'Recycle', 'Hold', 'Print', and 'Approve'.

**Step 11:** Click the **View Approval Route** button to see the approval workflow.

**Step 12:** You can see that the eForm has now been approved by you, the employee, and that it is now pending with the Principal Investigators of any sponsored award projects your salary was charged. Once the Principal Investigator(s) approves, it will move to the Supervisor.

**Step 13:** The **Parallel Stage** will show all of the PIs responsible for each project identified on the eForm.

- If the employee and the PI are the same person, PI certification will be automatic when approved as the employee. If the PI and Supervisor are the same person, Supervisor approval will be automatic when approved as the PI.
- There are parallel stages for each of the project/grant identified on the report. If the projects listed all have different PIs, it can be in multiple queues at the same time.

The screenshot shows the 'Approval' dialog box with the following details:

- Employee Stage:** G3FORM\_ID=195456, Awaiting Further Approvals
- Parallel Stage:** G3FORM\_ID=195456, PROJECT\_ID=10008115, Pending
- Parallel Path:** Pending, Principal Investigator Project
- Parallel Stage (Listed Projects):**
  - G3FORM\_ID=195456, PROJECT\_ID=10008115, Pending
  - G3FORM\_ID=195456, PROJECT\_ID=10008115, Pending
  - G3FORM\_ID=195456, PROJECT\_ID=10008115, Awaiting Further Approvals
  - G3FORM\_ID=195456, PROJECT\_ID=10008115, Awaiting Further Approvals
- Supervisor Stage:** G3FORM\_ID=195456, Awaiting Further Approvals

**Step 14:** Click the **Signature/Action Logs** drop-down arrow to view additional transaction log information.

The screenshot shows the 'Signature/Action Logs' section with the following data:

**Transaction / Signature Log**

Current Date Time	Step Title	User ID	User Description	Form Action	Time Elapsed
08/24/2020 3:06:10PM	Saved			Save	
08/24/2020 3:06:41PM	Initiated			Submit	< 1 minute
08/24/2020 3:36:55PM	Employee Oprid			Approve	30 minutes

**Action Item Log**

Acknowledgement	Description	User	Time Stamp
Yes	To the best of my knowledge, I confirm this report reflects all current payroll actions and requests.		08/24/20 3:06:39 000000PM
Yes	To the best of my knowledge and belief, I certify that the payroll percentages reasonably reflect my effort and are consistent with the work I performed during this reporting period. I am aware that filing inaccurate and/or late effort reports may result in punitive actions as noted in federal and University policies.		08/24/20 3:28:01 000000PM

If the effort is not reasonably reflected, follow steps 15 through 17.

**Step 15:** If the percentage on a distribution line(s) does not look reasonable, do not click the Certify button to toggle to yes. Notice when a line(s) is not certified, the Acknowledgement disappears.

**Step 16:** Use the **Comments** section to clearly identify your concern/questions making it easier for the Business Managers to begin the process of making the necessary changes. Click the **Comments** drop-down arrow and enter your comment in the box provided.

**Step 17:** To return the eForm back to the Business Managers for changes, click the **Recycle** button.

**Note:** A comment is required when recycling the eForm back to the Business Manager.

The screenshot displays the 'Form Page' interface for 'University Accounts'. At the top, it shows a subtotal of 58.88. Below this is a table with columns: Certified?, Earnings, Percent of Pay, Details, Project/Grant, Department, Cost Share, and Op Unit/Dept/Fund/Acct/Class. The first row (line 1) has 'Certified?' set to 'No', 'Earnings' of 74403.53, and 'Percent of Pay' of 41.11. Below the table, there is a subtotal of 74403.53 and a percent subtotal of 41.11. The 'Total Qualifying Accounts' section shows a total of 180982.78 and a percent total of 100.00. The 'File Attachments' section has an 'Add' button and a table with columns: Status, Action, Description, File Name, and Remove. Below this is a 'Comments' section with a text box containing the comment: 'Line 1 for University Accounts does not look correct to me. Please review and make all necessary changes.' At the bottom of the form, there are buttons for Search, Recycle, Hold, Print, and Approve. The 'Recycle' button is highlighted with a red box.

### Next Steps:

- Once you complete your certification, the report will:
  - Route to the PI(s) of the projects your salary was charged for review and certification
  - And then, to your primary supervisor for review and certification
- If a correction is requested at any step of the process (and the form is recycled), it will route back to the Business Manager to make any needed adjustments.
- The Business Manager will then re-submit the report for re-certification.

### III. Viewing the Time and Effort eForm

**Step 1:** Click the **View a Grant Report** tab.

**Step 2:** Click the **Search** button.

The screenshot shows the 'My Workplace' interface with the 'View a Grant Report' tab highlighted in green. On the right, there is a search section titled 'Search by:' with several filters: Form ID, Employee Name, Reporting Period, Primary Department, Form Status (set to 'is Equal To'), Form Type, and Empl ID. Each filter has a 'Begins With' dropdown and an input field. At the bottom of the search section are 'Search' and 'Clear' buttons.

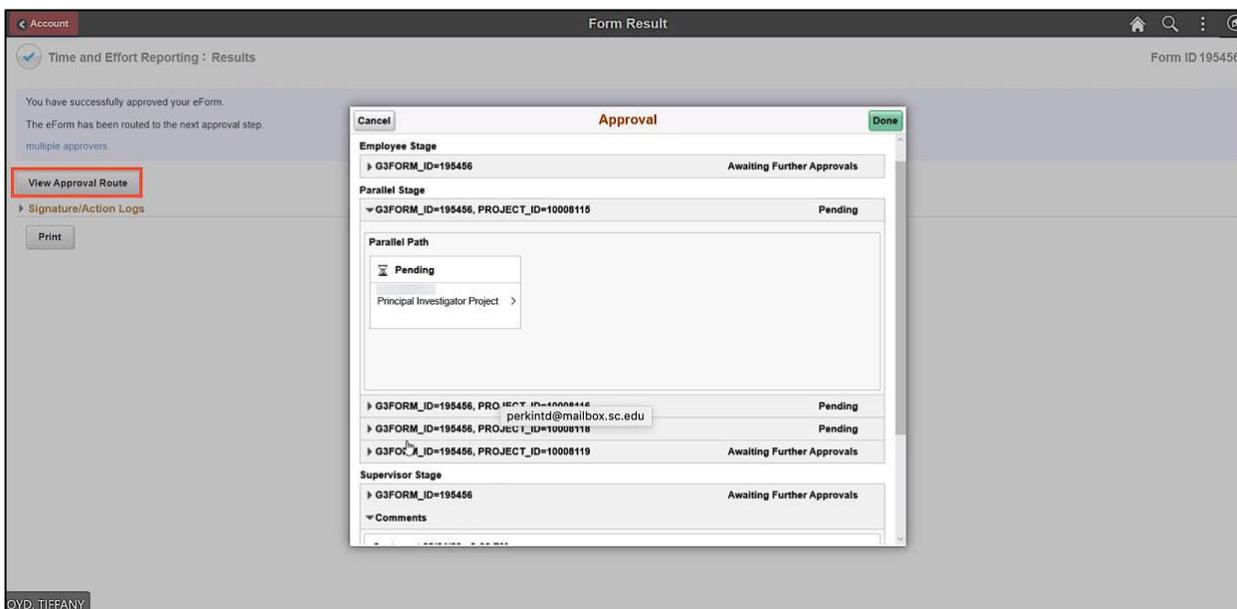
**Step 3:** The eForm page automatically opens indicating there is only one report available for you to certify. Please note more forms may appear if you are listed as the PI or Supervisor for a report that has been routed to you for certification.

**Note:** You can view both pending and already approved forms using this option.

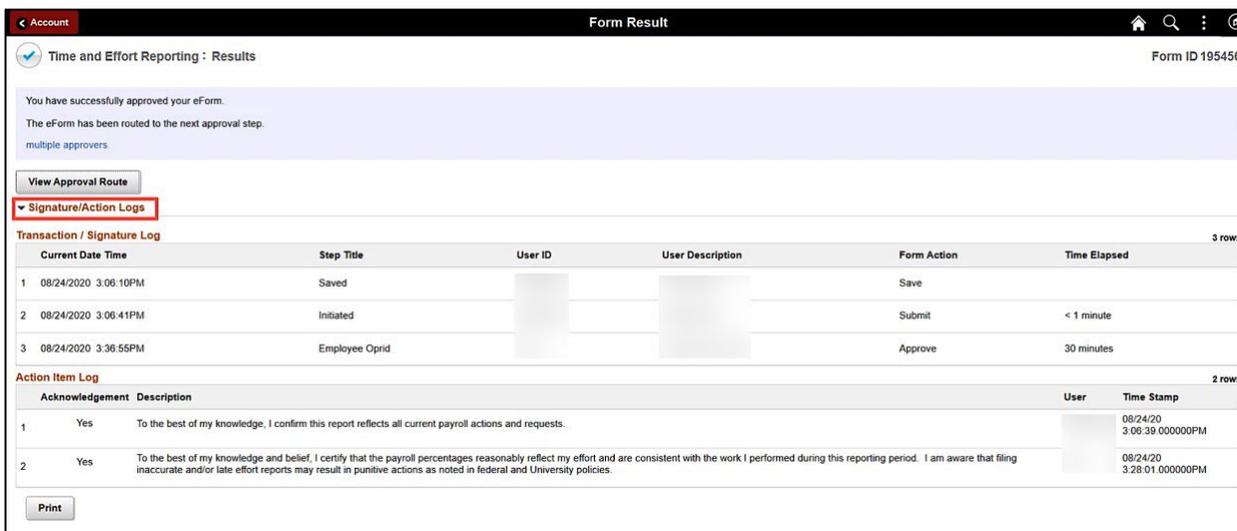
**Step 4:** To view the approval workflow, click the **Next** button. The **View a Grant Report** tab does not allow you to submit or recycle an eForm.

The screenshot shows the 'Form Page' for 'University Accounts'. It features a table with columns: Certified?, Earnings, Percent of Pay, Details, Project/Grant, Department, Cost Share, and Op Unit/Dept/Fund/Acct/Class. The table contains one row with the following data: Certified? Yes, Earnings 74403.53, Percent of Pay 41.11, Project/Grant (Details button), Department 155001, and Op Unit/Dept/Fund/Acct/Class CL040 155001 A0001 51300 101. Below the table are summary statistics: Subtotal 74403.53, Percent Subtotal 41.11, Total Qualifying Accounts Total 180982.78, and Percent Total 100.00. There is a 'File Attachments' section with an 'Upload' button and an 'Add' button. A 'Comments' section is expanded, showing two entries: one from Tue, Mar 3 20, 05:01:08 PM stating 'This all looks reasonable to me. Thank you.' and another from Tue, Mar 3 20, 05:00:40 PM stating 'Line 1 for University Accounts does not look correct to me. Please review and make all necessary changes.' At the bottom are 'Search', 'Next >>', and 'Print' buttons.

**Step 5:** Click the **View Approval Route** to see where the eForm is in the approval process. This eForm is still waiting for approval from the Principal Investigators.



**Step 6:** Click the **Signature/Action Logs** drop-down arrow to view additional transaction log information.



## IV. Time and Effort eForm Actions

**Account**

Welcome to the University of South Carolina's Time and Effort Reporting and Certification Center. This is where you will manage Time and Effort reports and required certification for employees.

Time and Effort reports can only be corrected by submitting a Retro Funding Change request to the RetroJE mailbox at [RetroJE@mailbox.sc.edu](mailto:RetroJE@mailbox.sc.edu). Once correction is processed, forms will automatically refresh and update.

The following actions can be performed through this center:

**Update a Time and Effort Report** – Allows you to manually refresh and capture any updates (as applicable) for a report(s).

**Certify a Time and Effort Report** – Allows you to review and certify applicable effort based on salary charged for a report(s).

**View a Time and Effort Report** – Allows you to view report(s).

Below is an explanation of each action highlighted above and who can perform that action.

### Time and Effort eForm Actions

	Add	Update	Certify	View
	Only the Controller's Office can add/create a new eForm.	Allows you to review and verify distribution lines and release for certification.	Allows you to review and certify applicable effort based on salary charged for a report(s).	Allows you to view report(s), including approval workflow and transaction log.
<b>Business Manager</b>	×	✓	×	✓
<b>Employee</b>	×	×	✓	✓
<b>Principal Investigator</b>	×	×	✓	✓
<b>Supervisor</b>	×	×	✓	✓
<b>Controller's Office</b>	✓	✓	×	✓

**Note:** Business Managers, Employees, PIs, and Supervisors may see all three action tabs but will not receive search results if it's an action that cannot be performed by the role as indicated above.

## V. Time and Effort eForm Status

Time and Effort eForm Status	Status Description
Saved	<p>Business Manager – Receives the reports in <b>“Saved”</b> status and submits or releases them to Employees for certification.</p> <p>If a retro funding change is processed after the form has been submitted and released for certification, it will automatically be recycled back to the Business Manager in a <b>“Saved”</b> status.</p>
Pending	<p>Employees, PIs, &amp; Supervisors receive the reports in <b>“Pending”</b> status (because they are pending approval).</p>
Partially Approved	<p>If a report is recycled by a user at any point, it will return to the Business Manager in a <b>“Partially Approved”</b> Status.</p> <p>Business Managers will initiate all necessary changes and <b>Resubmit</b> the form.</p>
Executed	<p>Once a report is fully certified, the report status is <b>“Executed”</b>.</p>
On Hold	<p>This function is not recommended used. Reports can stay in an approvers cue until ready to be approved or recycled.</p> <p>The employee, PI, or supervisor have the Time and Effort Report on hold to verify the payroll information before certifying and submitting to the next level.</p>
Withdrawn	<p>The eForm has been withdrawn by the Controller’s Office and is no longer available to the Business Manager to release for certification.</p>

Use **View Option** to review form status, not Update! This will prevent accidentally restarting workflow.

## VI. Employee Responsibilities

As a Non-Principal Investigator:

- Review the projects your salary was charged to
- Ensure the percentage charged is a reasonable representation of how your time was spent
- If you have questions or concerns, coordinate with your Business Manager

As a Principal Investigator:

- Review the projects your salary was charged to
- Ensure the percentage charged is a reasonable representation of how your time was spent
- Ensure the effort that is reported is consistent with effort reported within progress reports submitted to the sponsor
- Ensure all awards you are serving as PI on and should have time charged are represented appropriately
- Effort should be reviewed to ensure there are no issues with over commitment of time
- If you have questions or concerns, coordinate with your Business Manager

## VII. Time and Effort Email Notification

Below is an example of the Time and Effort email notification received when a form is **routed** to the Employee, Principal Investigator, and Supervisor for approval.

Click the **link** and you will be prompted to sign into HCM PeopleSoft. If you already have HCM PeopleSoft open, it will take you directly to the Time and Effort eForm.

**ACTION REQUIRED:** 155401, Go-Live Catch-up 2019 T&E Report is ready for Approval, 144842

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 [Redacted Name]  
 Wednesday, March 4, 2020 at 5:38 PM  
[Show Details](#)

Time and Effort Certification Report eForm ID 144842 for [Redacted Name] has been routed for your review and certification. This form is for the Go-Live Catch-up 2019 certification period. Please login into HCM - My Workplace to work on this form or follow the link below.

[https://hcm-dev.ps.sc.edu/psp/HDEV/EMPLOYEE/HRMS/c/G3FRAME\\_G3SEARCH\\_FL\\_GBL?Page=G3SEARCH\\_FL&Action=U&G3FORM\\_FAMILY=ACCOUNT&G3FORM\\_ID=144842&G3FORM\\_TASK=EVL](https://hcm-dev.ps.sc.edu/psp/HDEV/EMPLOYEE/HRMS/c/G3FRAME_G3SEARCH_FL_GBL?Page=G3SEARCH_FL&Action=U&G3FORM_FAMILY=ACCOUNT&G3FORM_ID=144842&G3FORM_TASK=EVL)

Certification is required to be completed within 30 days. Late or inaccurate certifications may result in punitive actions as noted in federal and University policies. Do not reply to this email. If you have questions or need assistance, please contact your Business Manager.

Thank you,  
 Grants and Funds Management  
 UofSC Controller's Office