UNIVERSITY OF
South Carolina

Controller's Office – Grants and Funds Management

Time and Effort Reporting – Employee

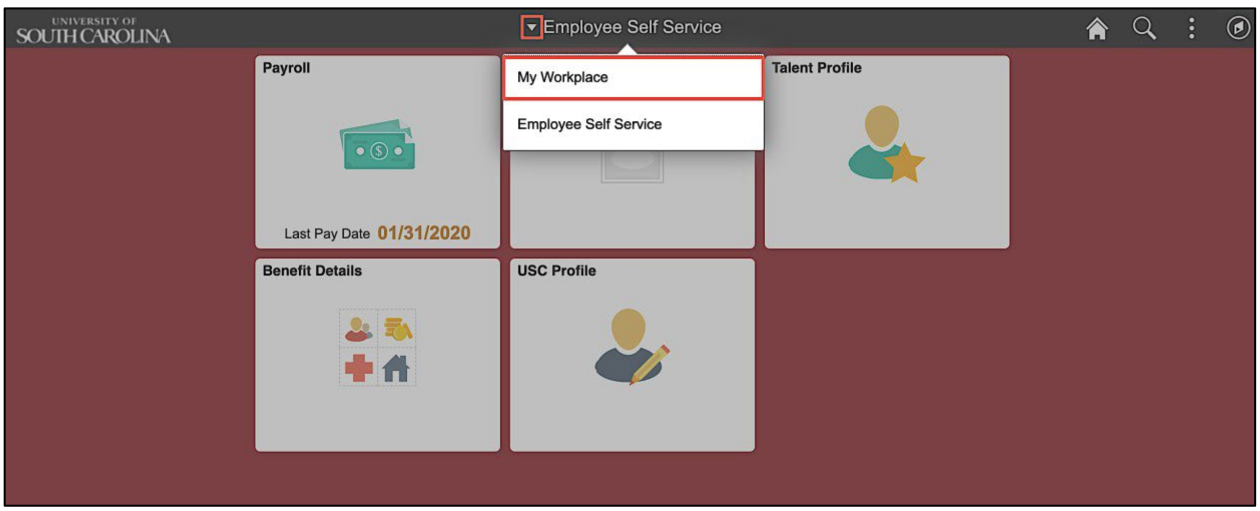
I. Navigation in HCM PeopleSoft (https://hcm.ps.sc.edu/)

To view the Time and Effort home screen navigate to:

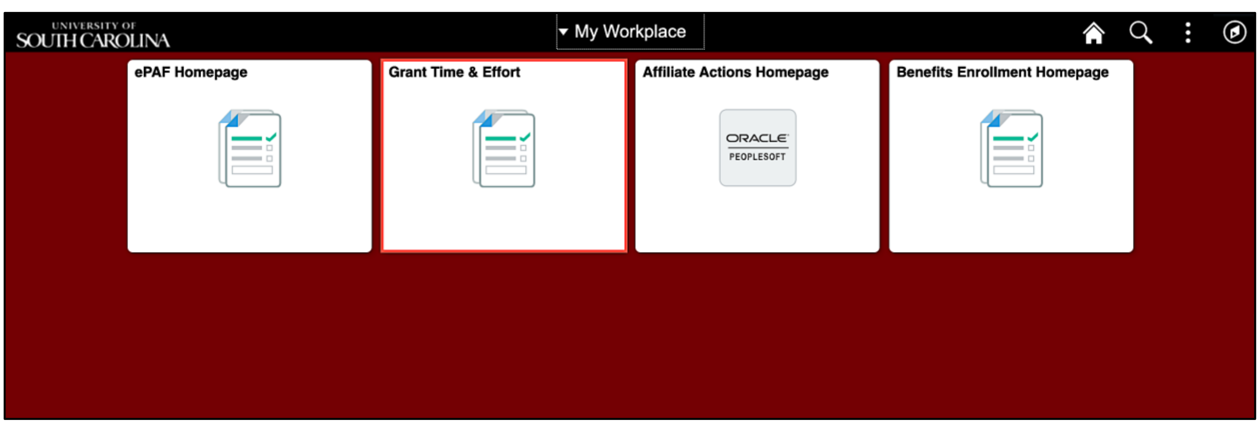
Employee Self Service > My Workplace/My Homepage > Grant Time and Effort

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.



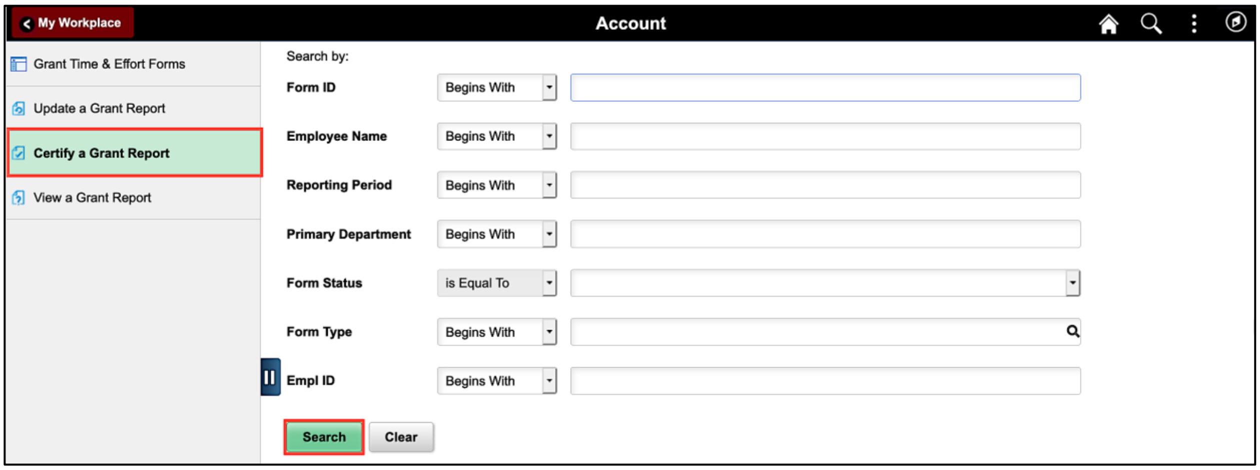
II. Verifying and Releasing Time and Effort Report eForms

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.

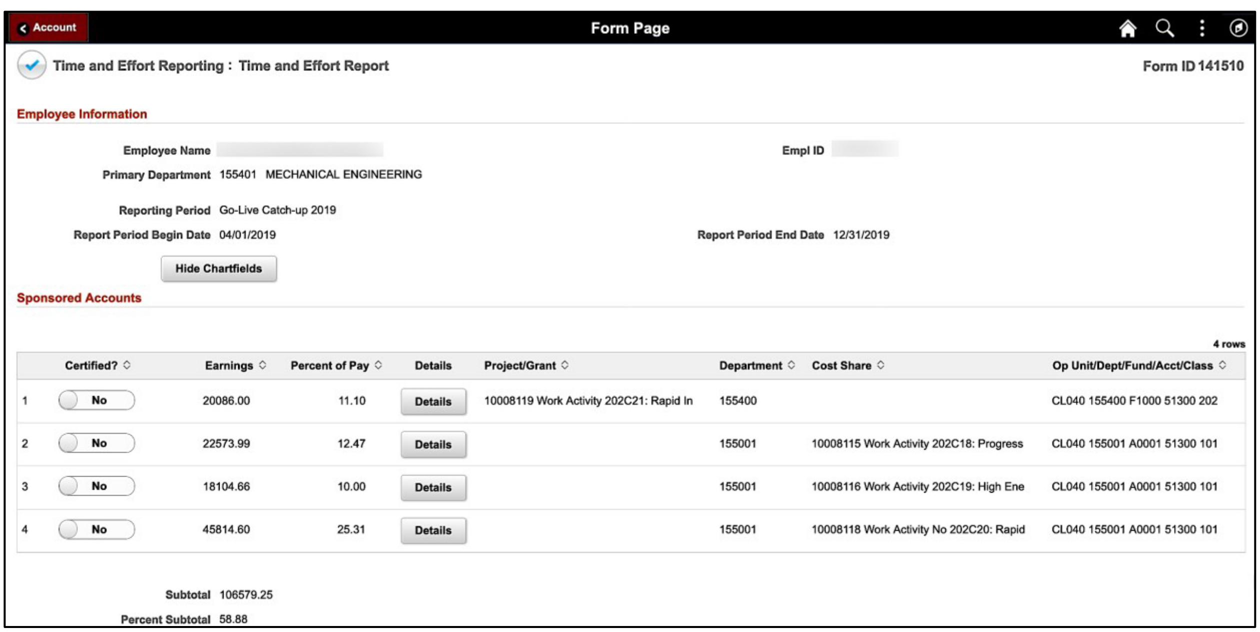
Step 1: Click the **Certify a Grant Report** tab.

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



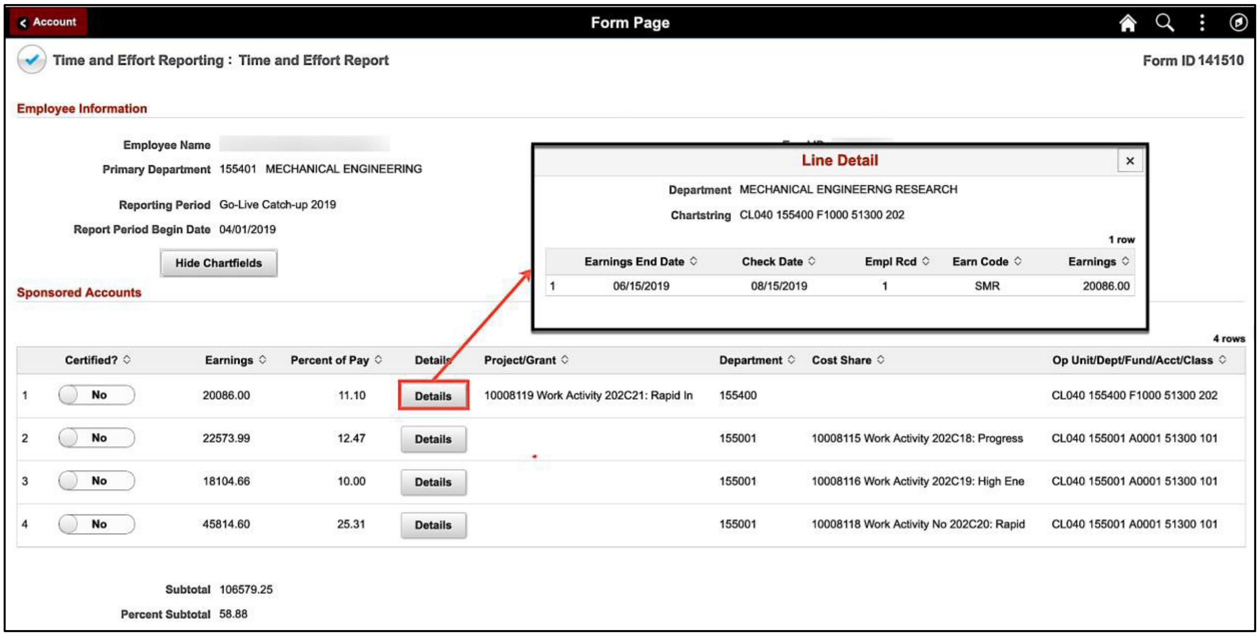
Step 3: The eForm page automatically opens indicating there is only one report available for you to certify. If there are multiple forms, they will populate below the search criteria section of the page.

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.



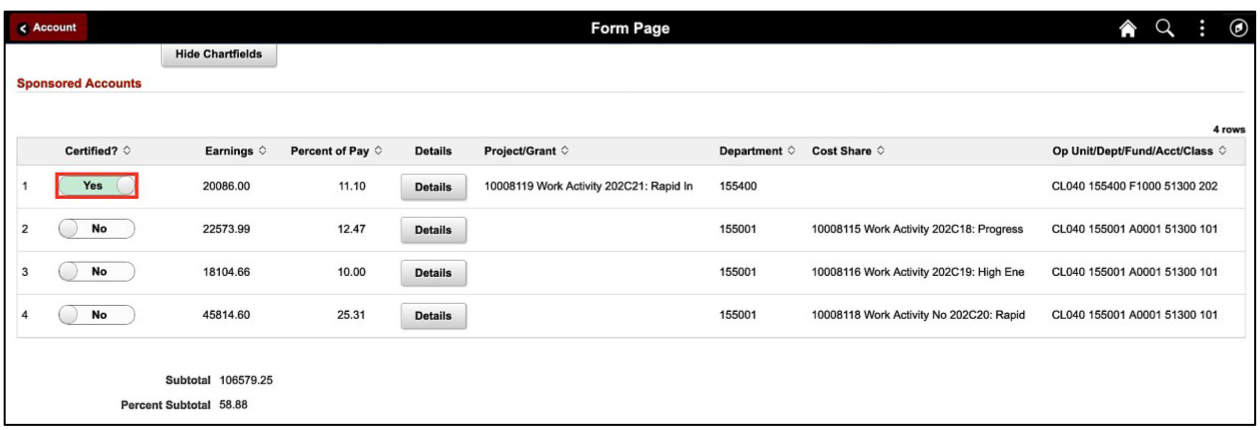
Now let's begin reviewing and certifying each distribution line.

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.

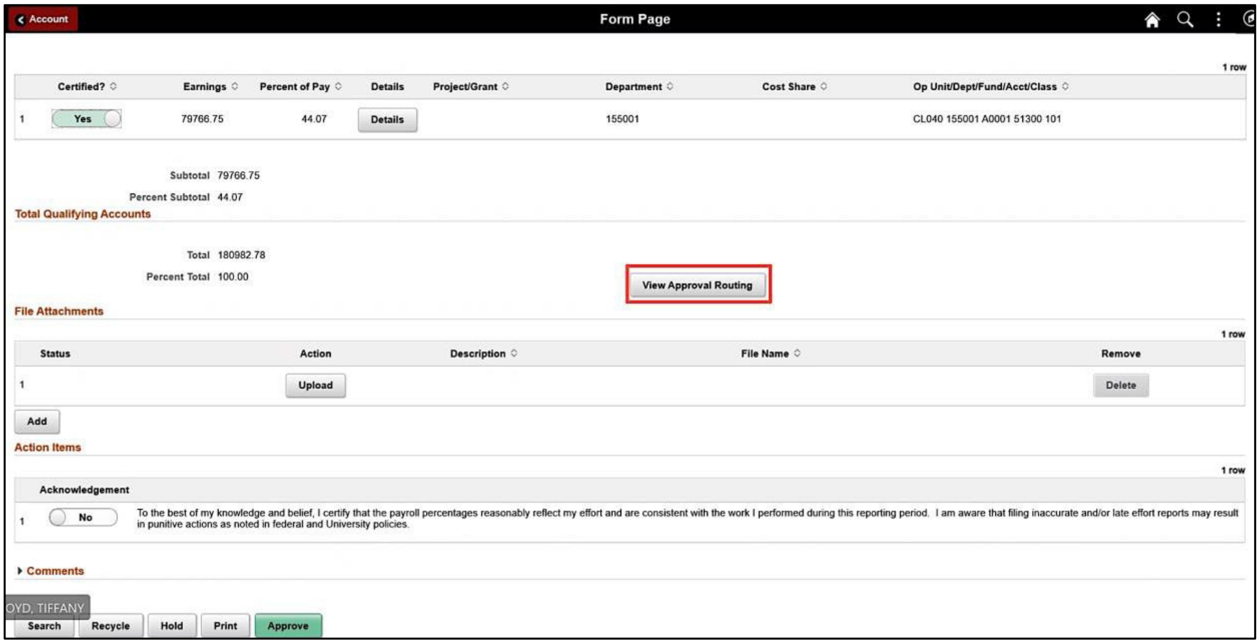


Step 5: If you feel the percentage identified on Distribution Line 1 reasonably reflects your effort, click the **Certify** button to toggle to **Yes**.

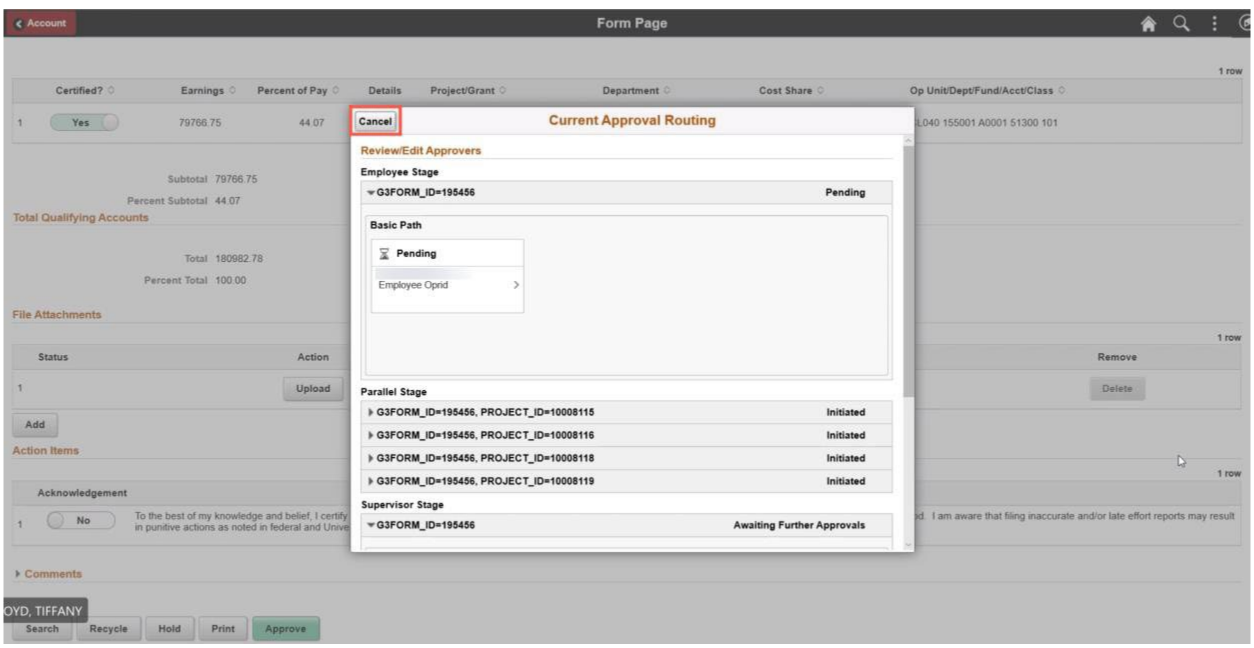
Continue to review and certify all remaining Distribution Lines.



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



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

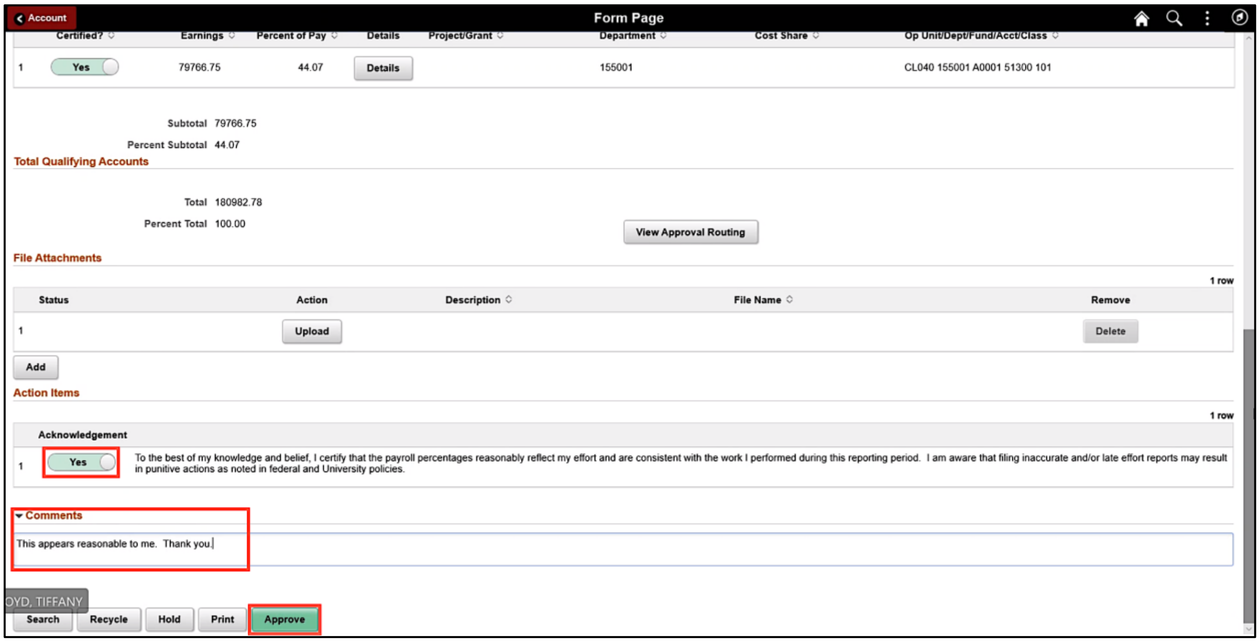


Step 8: When all Distribution Lines on the Time and Effort report are certified, acknowledge the reported effort is reasonably reflected. To do this, click the **Acknowledgement** button to toggle to **Yes**.

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.



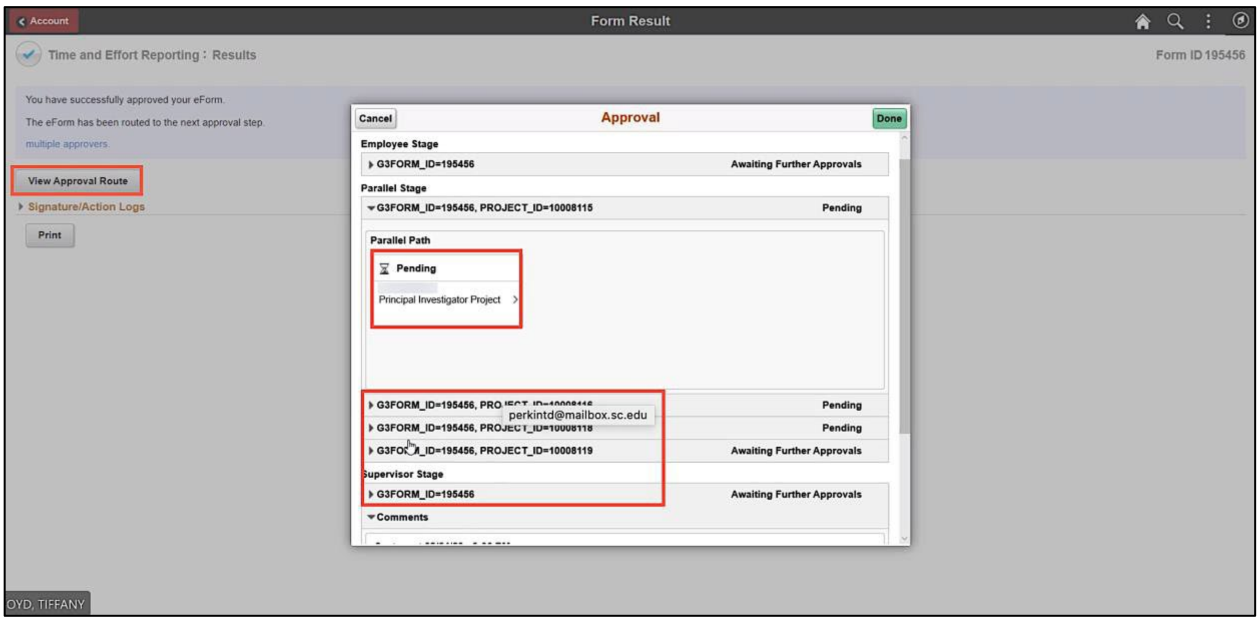
Step 11: Click the **View Approval Route** button to see the approval workflow.

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.

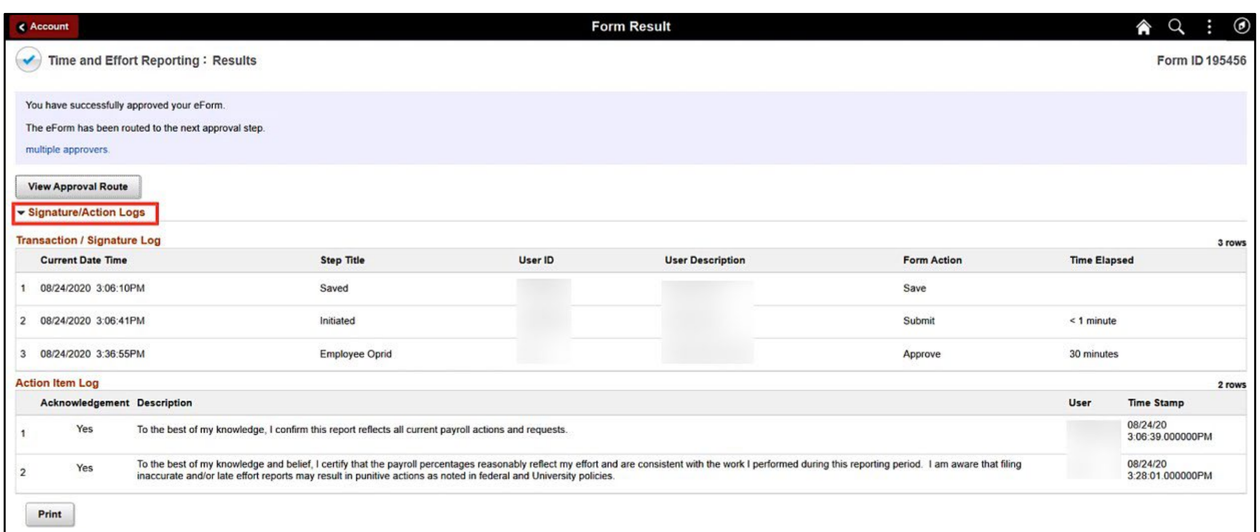
Step 13: The **Parallel Stage** will show all of the PIs responsible for each project identified on the eForm.

- 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.



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



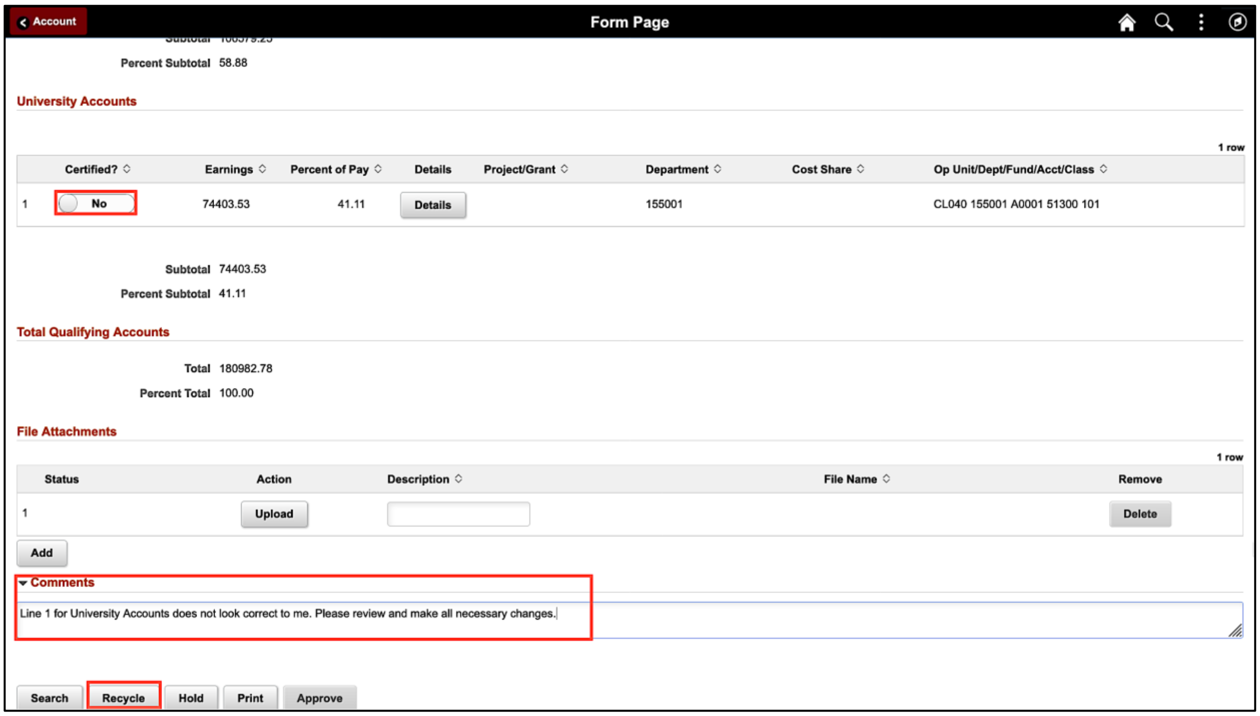
If the effort is not reasonably reflected, follow steps 15 through 17.

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.



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

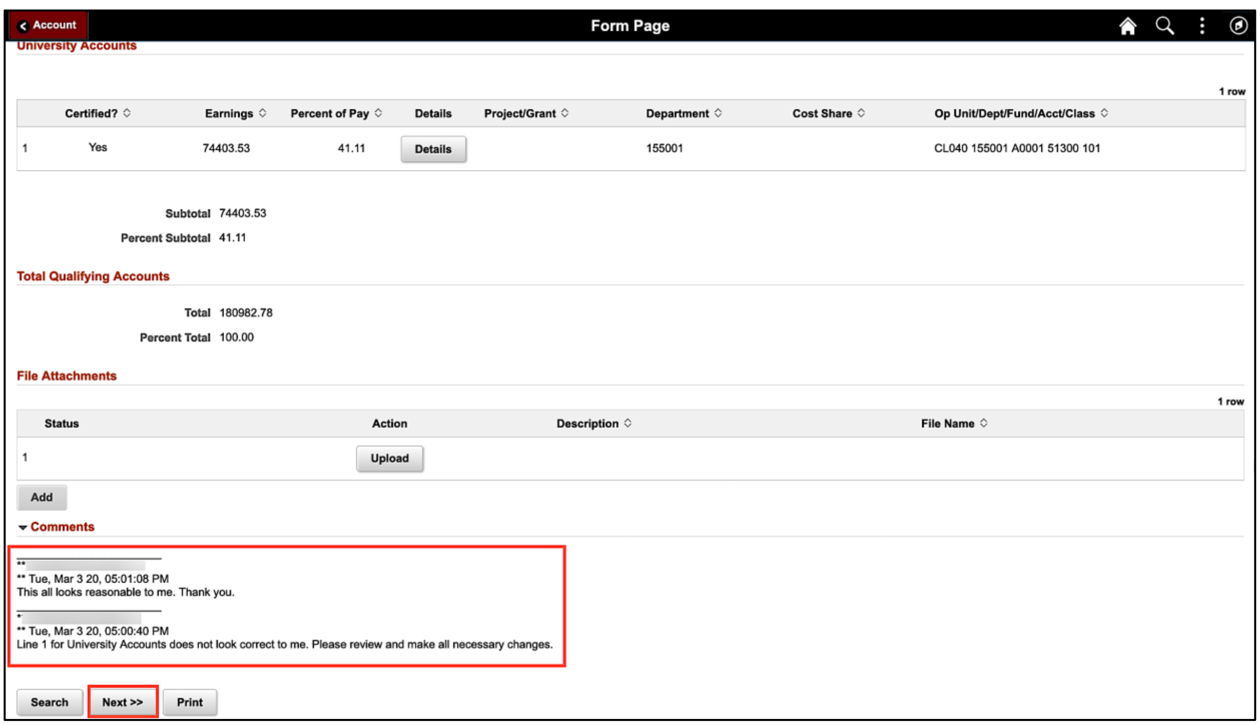
Step 1: Click the **View a Grant Report** tab.

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

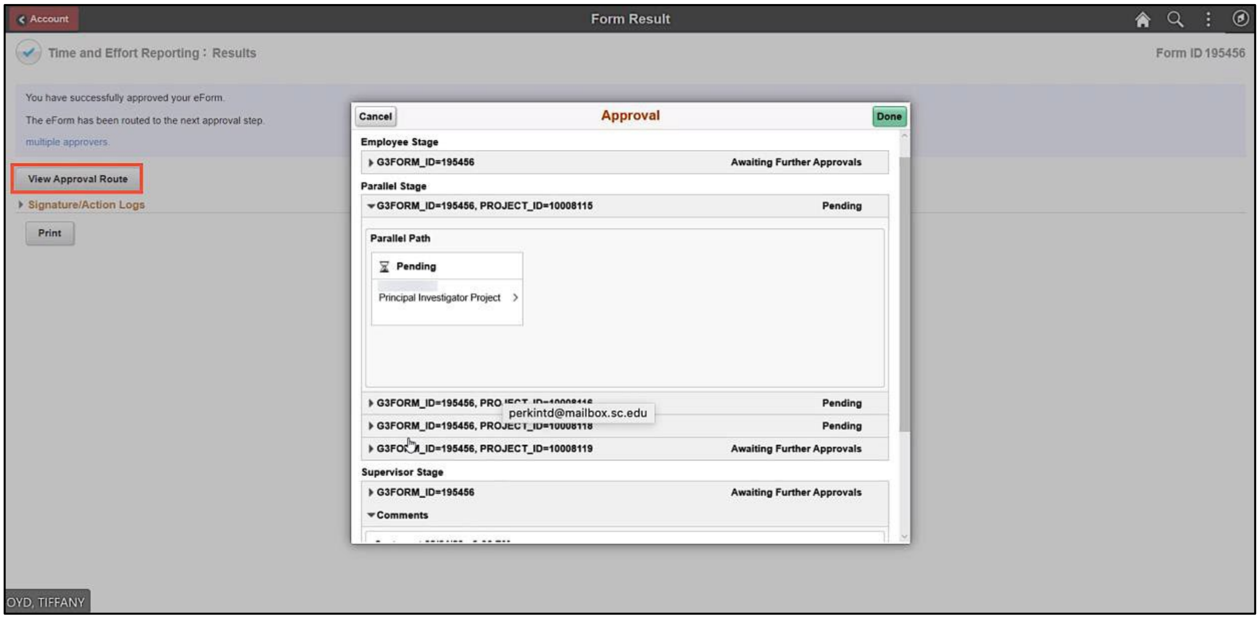
Step 3: The eForm page automatically opens indicating there is only one report available for you to certify. Please note more forms may appear if you are listed as the PI or Supervisor for a report that has been routed to you for certification.

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

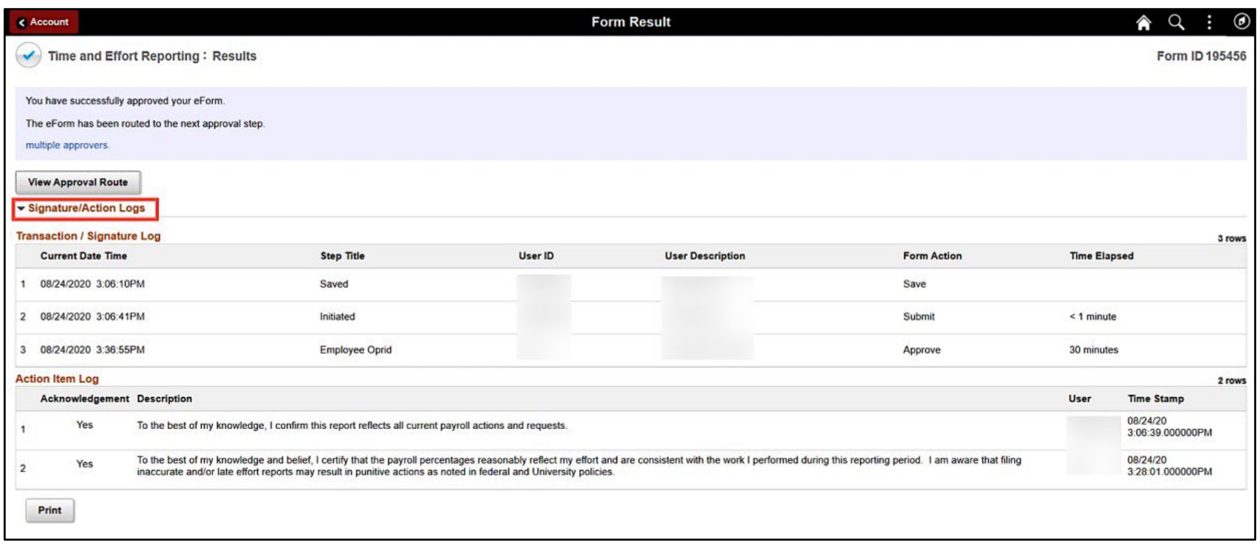
Step 4: To view the approval workflow, click the **Next** button. The **View a Grant Report** tab does not allow you to submit or recycle an eForm.



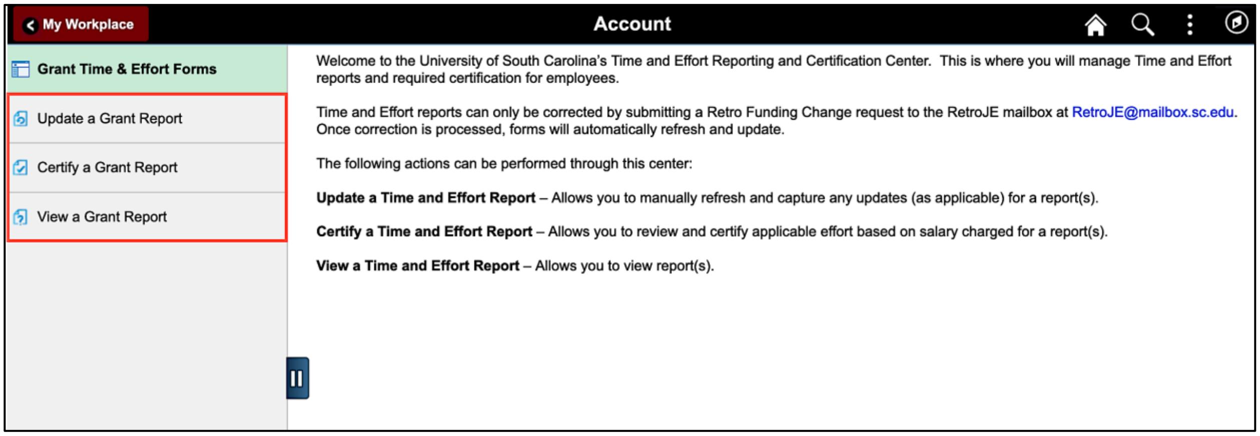
Step 5: Click the **View Approval Route** to see where the eForm is in the approval process. This eForm is still waiting for approval from the Principal Investigators.



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



IV. Time and Effort eForm Actions



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.
Business Manager	×	✓	×	✓
Employee	×	×	✓	✓
Principal Investigator	×	×	✓	✓
Supervisor	×	×	✓	✓
Controller's Office	✓	✓	×	✓

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	Business Manager – Receives the reports in **“Saved”** status and submits or releases them to Employees for certification. 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 **“Saved”** status.
Pending	Employees, PIs, & Supervisors receive the reports in **“Pending”** status (because they are pending approval).
Partially Approved	If a report is recycled by a user at any point, it will return to the Business Manager in a **“Partially Approved”** Status. Business Managers will initiate all necessary changes and **Resubmit** the form.
Executed	Once a report is fully certified, the report status is **“Executed”**.
On Hold	This function is not recommended used. Reports can stay in an approvers cue until ready to be approved or recycled. 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.
Withdrawn	The eForm has been withdrawn by the Controller’s Office and is no longer available to the Business Manager to release for certification.

Use **View Option** to review form status, not Update! This will prevent accidently 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

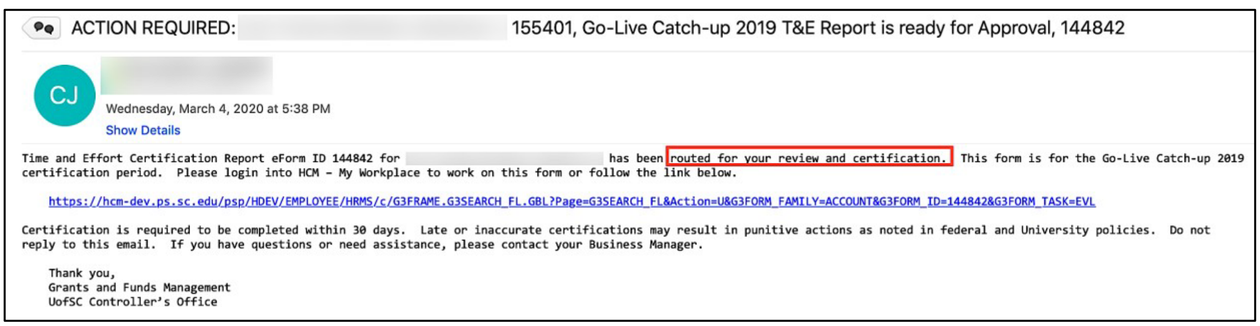
As a Principal Investigator:

- 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

CJ

Wednesday, March 4, 2020 at 5:38 PM

Show Details

Time and Effort Certification Report eForm ID 144842 for 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

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