

Controller's Office – Grants and Funds Management

Time and Effort Reporting – Supervisor

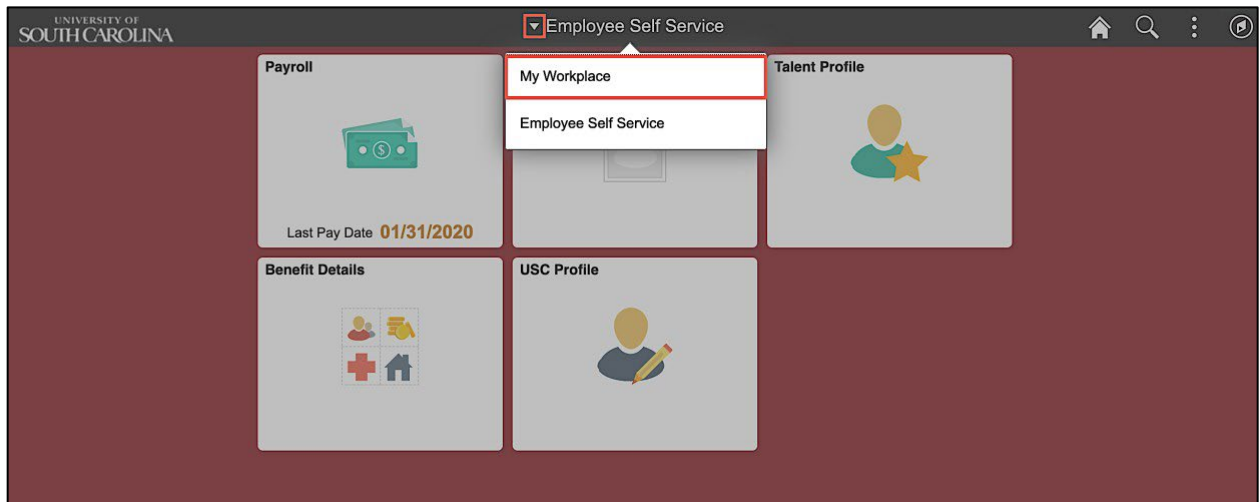
I. Navigation in HCM PeopleSoft (<https://hcm.ps.sc.edu/>)

To view the Time and Effort home screen navigate to:

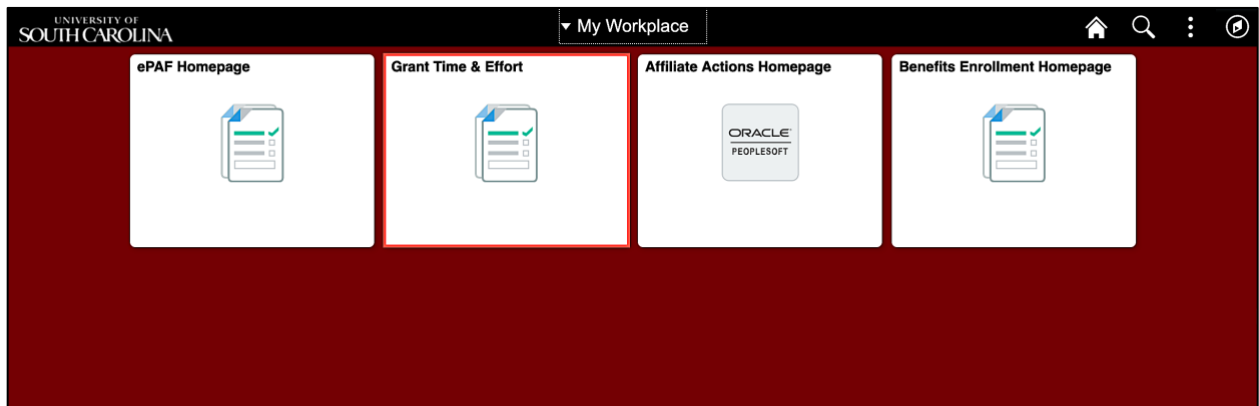
Employee Self Service > My Workplace/My Homepage > Grant Time and Effort

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 for an employee on a Time and Effort eForm reasonably reflects their effort.

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

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

The screenshot shows the 'Account' page with a search interface. On the left, a sidebar contains three tabs: 'Grant Time & Effort Forms', 'Update a Grant Report', and 'Certify a Grant Report'. The 'Certify a Grant Report' tab is highlighted with a red border. The main area contains search filters for 'Form ID', 'Employee Name', 'Reporting Period', 'Primary Department', 'Form Status', 'Form Type', and 'Empl ID'. Each filter has a 'Begins With' dropdown and an input field. At the bottom, there is a 'Search' button (highlighted in red) and a 'Clear' button.

Step 3: The eForm page automatically opens indicating there is only one report available to certify. If responsible for multiple reports, a list of eForms requiring your approval will populate below the search criteria section of the page. Just click the employee name to begin certifying and approving eForms for which you are responsible.

Notice the employee’s certification is complete because all distribution lines are toggled to **Yes**.

The screenshot shows the 'Form Page' for 'Time and Effort Reporting : Time and Effort Report' with Form ID 141510. It displays employee information and a table of sponsored accounts. The 'Certified?' column in the table has all entries set to 'Yes'.

	Certified?	Earnings	Percent of Pay	Details	Project/Grant	Department	Cost Share	Op Unit/Dept/Fund/Acct/Class
1	Yes	20086.00	11.10	Details	10008119 Work Activity 202C21: Rapid In	155400		CL040 155400 F1000 51300 202
2	Yes	22573.99	12.47	Details		155001	10008115 Work Activity 202C18: Progress	CL040 155001 A0001 51300 101
3	Yes	18104.66	10.00	Details		155001	10008116 Work Activity 202C19: High Ene	CL040 155001 A0001 51300 101
4	Yes	45814.60	25.31	Details		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: If you feel the percentage identified on Distribution Line 1 reasonably reflects an employee's effort, then move on to the next line.

Continue to review all remaining Distribution Lines.

Personnel Accounts (4 rows)

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

Subtotal 106579.25
Percent Subtotal 58.88

University Accounts (1 row)

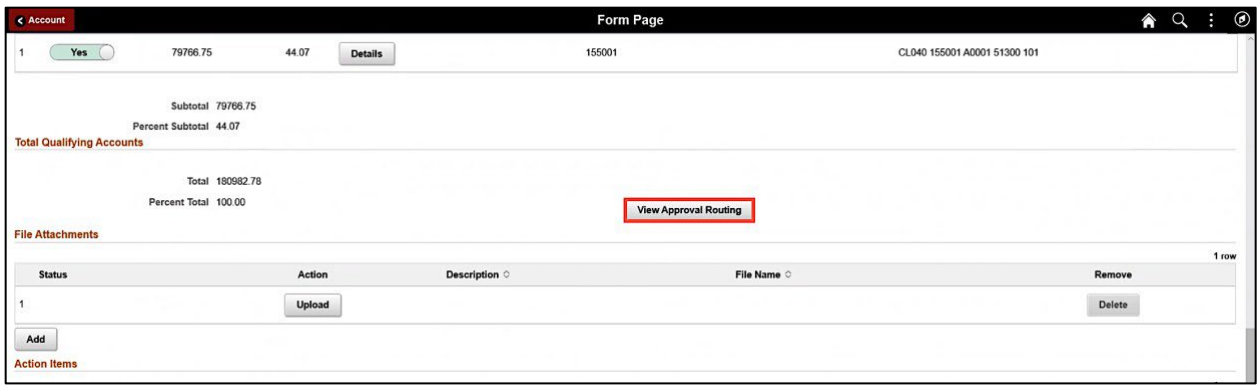
Certified?	Earnings	Percent of Pay	Details	Project/Grant	Department	Cost Share	Op Unit/Dept/Fund/Acct/Class
<input checked="" type="radio"/>	74403.53	41.11	Details		155001		CL040 155001 A0001 51300 101

Subtotal 74403.53
Percent Subtotal 41.11

Total Qualifying Accounts

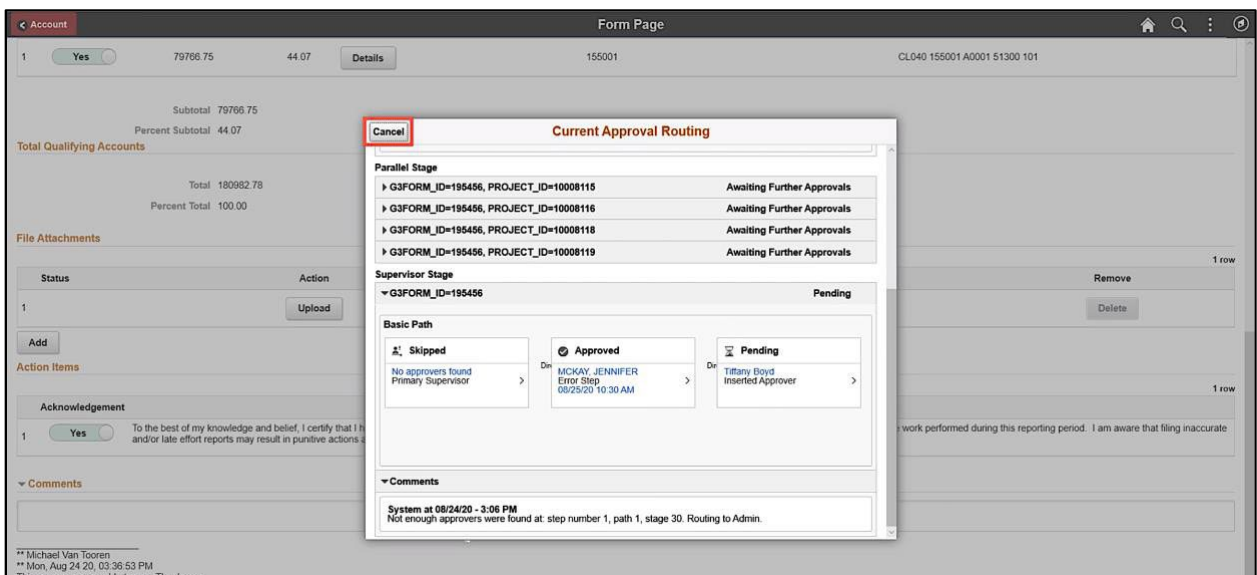
Total 180982.78
Percent Total 100.00

Step 5: Click the **View Approval Routing** button to see the approval workflow.



Step 6: Click the **Cancel** button to return to the form page.

Notice the PIs have already approved the distribution lines charged to their projects.



Step 7: When your review is complete and you are ready to acknowledge the reported effort is reasonably reflected, click the **Acknowledgement** button to toggle to **Yes**.

Step 8: Click the **Comments** drop-down arrow, click in the Comments box and 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.

Notice the comments entered by previous approvers.

Step 9: Click the **Approve** button to complete your certification.

The screenshot shows the 'Form Page' interface for a supervisor. At the top, there is a navigation bar with a home icon, a search icon, and a refresh icon. Below this, the form displays a summary of the reporting period with the following data:

1	Yes	79766.75	44.07	Details	155001	CL040 155001 A0001 51300 101
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Subtotal: 79766.75
Percent Subtotal: 44.07

Total Qualifying Accounts

Total	180982.78
Percent Total	100.00

View Approval Routing

File Attachments

Status	Action	Description	File Name	Remove
1	Upload			Delete

Add

Action Items

Acknowledgement

1	Yes	To the best of my knowledge and belief, I certify that I have firsthand knowledge of the employee, and the payroll percentages reasonably reflect their effort and are consistent with the work 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.
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Comments

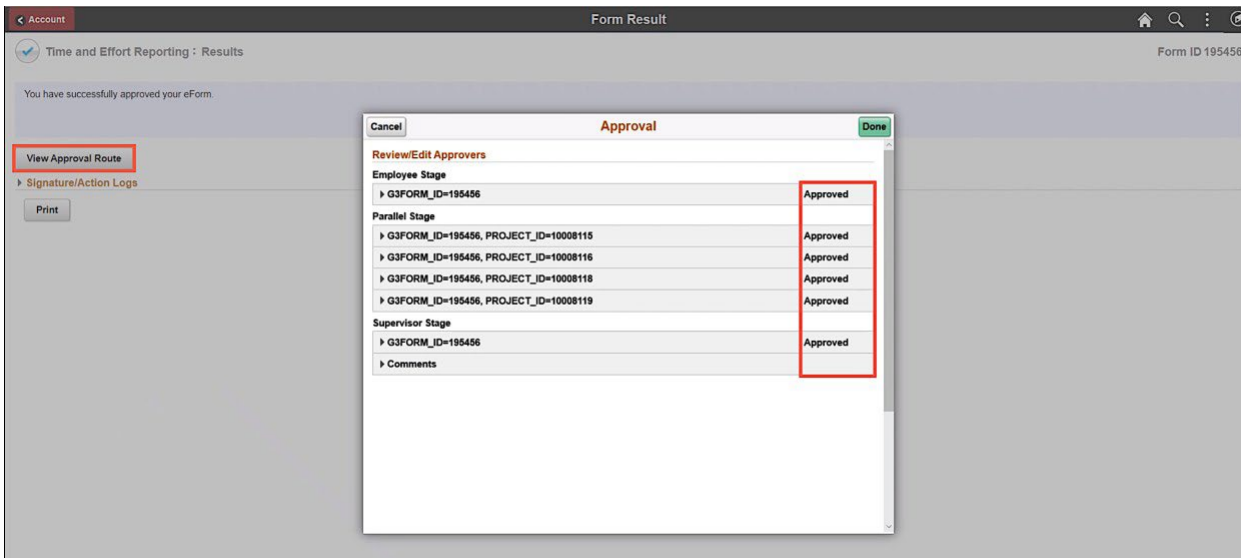
** Mon, Aug 24 20, 03:36:53 PM
This appears reasonable to me. Thank you.

OYD, TIFFANY

Search Recycle Hold Print Approve

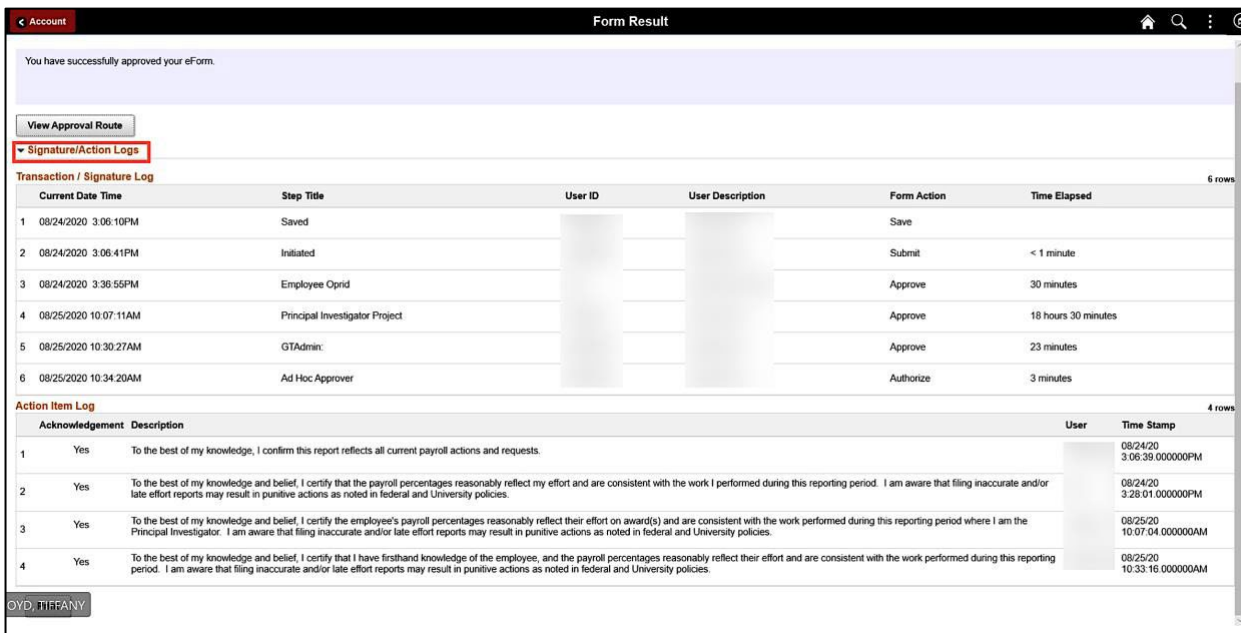
Step 10: Click the **View Approval Route** button to see the approval workflow.

Step 11: You can see that the eForm has now been approved by the employee, the PIs and the Supervisor. The form is now complete.



Step 12: Click the **Signature/Action Logs** drop-down arrow to view additional transaction log information.

Notice the Acknowledgement Log.



If the effort is not reasonably reflected, follow steps 13 through 15.

Step 13: If the percentage on a distribution line(s) does not look reasonable, click the **Certify** button to toggle to **No**. Notice when a line(s) is not certified, the Acknowledgement disappears.

Step 14: Be sure to clearly identify the problem in the comment box for the Business Managers so they can begin the process of making all necessary changes.

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

Step 15: To return the eForm back to the Business Managers for changes, click the **Recycle** button.

Account Form Page

Subtotal 10079.23
Percent Subtotal 58.88

University Accounts

Certified?	Earnings	Percent of Pay	Details	Project/Grant	Department	Cost Share	Op Unit/Dept/Fund/Acct/Class
<input checked="" type="radio"/> No	74403.53	41.11	Details		155001		CL040 155001 A0001 51300 101

Subtotal 74403.53
Percent Subtotal 41.11

Total Qualifying Accounts

Total 180982.78
Percent Total 100.00

File Attachments

Status	Action	Description	File Name	Remove
1	Upload			Delete

Comments

Line 1 for University Accounts does not look correct to me. Please review and make all necessary changes.

Search Recycle Hold Print Approve

Next Steps:

- Once you complete your certification, the report is complete.
- 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 eForm the Time and Effort eForm

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

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

My Workplace Account

Grant Time & Effort Forms

Update a Grant Report

Certify a Grant Report

View a Grant Report

Search by:

Form ID Begins With

Employee Name Begins With

Reporting Period Begins With

Primary Department Begins With

Form Status is Equal To

Form Type Begins With

Empl ID Begins With

Search Clear

Step 3: The eForm page automatically opens indicating there is only one report available for you to view. Scroll down to the bottom of the page. If responsible for multiple reports, a list of eForms requiring your approval will populate below the search criteria section of the page. Just click the employee name to view the eForm.

Scroll down to the bottom of the page. Notice the comments at the bottom of the page.

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.

Account Form Page

Certified?	Earnings	Percent of Pay	Details	Project/Grant	Department	Cost Share	Op Unit/Dept/Fund/Acct/Class
1	Yes	74403.53	41.11	Details	155001		CL040 155001 A0001 51300 101

Subtotal 74403.53
Percent Subtotal 41.11

Total Qualifying Accounts

Total 180982.78
Percent Total 100.00

File Attachments

Status	Action	Description	File Name
1	Upload		

Add

Comments

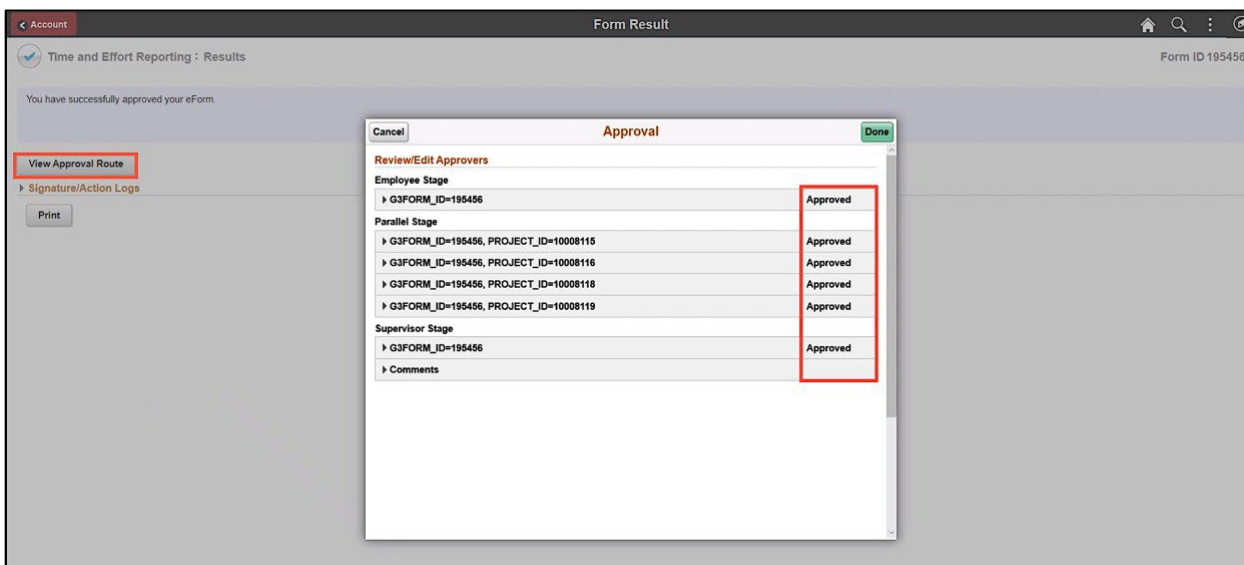
** Wed, Mar 4 20, 11:41:34 AM
This all looks reasonable to me. Thank you!

** Tue, Mar 3 20, 05:01:08 PM
This all looks reasonable to me. Thank you.

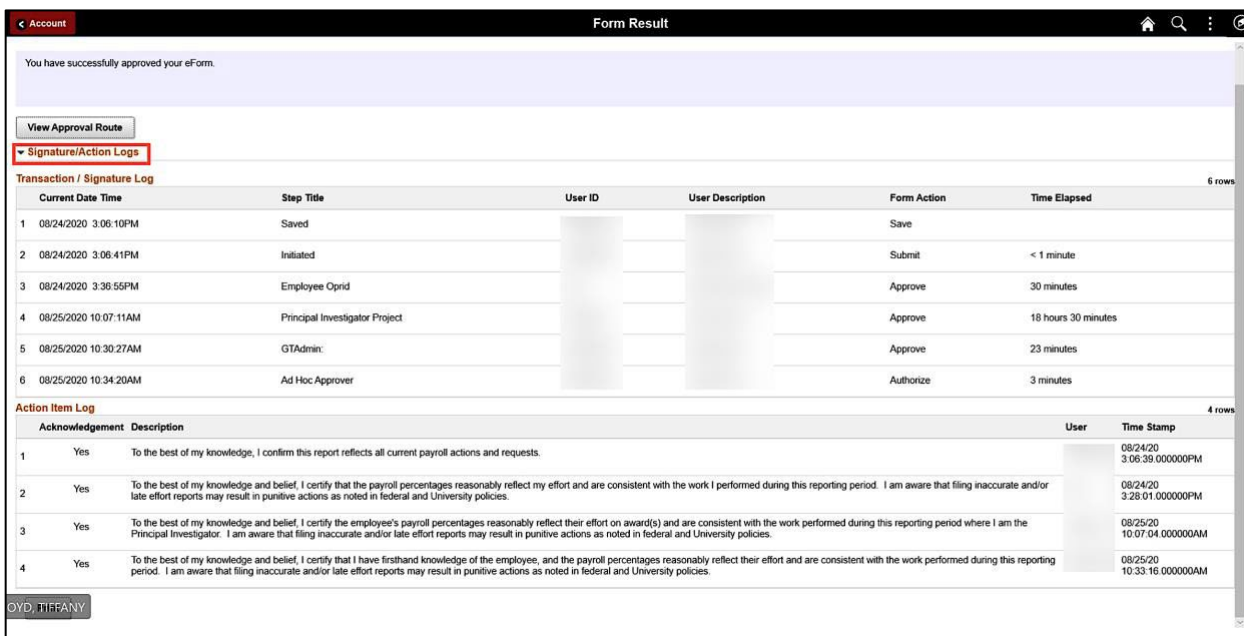
** Tue, Mar 3 20, 05:00:40 PM
Line 1 for University Accounts does not look correct to me. Please review and make all necessary changes.

Search **Next >>** Print

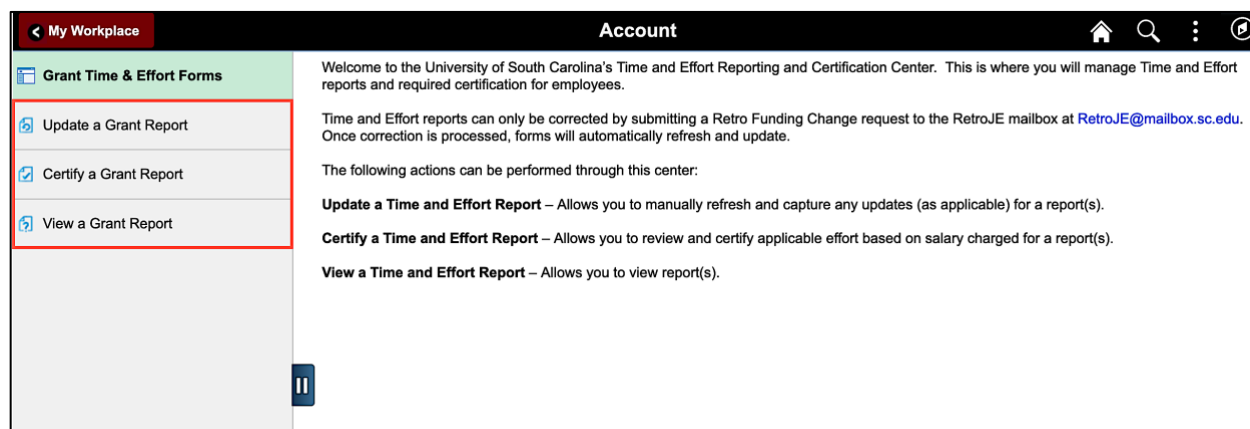
Step 5: Click the **View Approval Route** to see where the eForm is in the approval process. This eForm has been fully approved.



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	<p>Business Manager – Receives the reports in “Saved” 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 “Saved” status.</p>
Pending	<p>Employees, Supervisors, & PIs receive the reports in “Pending” 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 “Partially Approved” Status.</p> <p>Business Managers will initiate all necessary changes and Resubmit the form.</p>
Executed	<p>Once a report is fully certified, the report status is “Executed”.</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. Supervisor Responsibilities

- Ensure that the salary charged to the University Accounts (non-grant amount and percentage) seems reasonable. For example, is there enough non-grant time available to cover teaching and/or administrative duties.
- To the best of your ability, review the salary charged to Sponsored Accounts and ensure the percentage charged is a reasonable representation of how their time was spent.
- Your certification is verification you have first-hand knowledge of the employee's effort.
- 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.

