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

To view the Time and Effort home screen navigate to:

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

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

**Step 2:** Click the **My Workplace** 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 GFM Office using the 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 Supervisor or PI for a report that has been routed to you for certification.
Now let’s begin reviewing and certifying each distribution line.

**Step 4:** Click the Details button to view the pay periods included in the distribution.

![Image of the eForm showing Step 4]

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

Continue to review and certify all remaining Distribution Lines.

![Image of the eForm showing Step 5]
**Step 6:** 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 show **Yes**.

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

**Step 7:** 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.

**Step 8:** Click the **Approve** button to complete your certification.
Step 9: Click the **View Approval Route** button to see the approval workflow.

Step 10: You can see that the eForm has now been approved by you, the employee, and that it is now pending with the Supervisor. Once the Supervisor approves, it will move to the Principal Investigators.

Step 11: 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 at the PI step. If the supervisor and PI are the same person, PI certification will be automatic at the PI step.

- 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 12: Click the **Signature/Action Logs** drop-down arrow to view additional transaction log information.
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, do not click the Certify button to show yes. Notice when a line(s) is not certified, the Acknowledgement disappears.

**Step 14:** 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 15:** 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.

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### Next Steps:

- Once you complete your certification, the report will:
  - Route to your primary supervisor for review and certification
  - Then to the PI(s) of the projects your salary was charged 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 eForm 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 listed as the Supervisor or PI for a report that has been routed to you for certification.

Please note more forms may appear if you are listed as the Supervisor or PI for a report that has been routed to you for certification. 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.
**Step 5:** Click the **View Approval Route** to see where the eForm is in the approval process. This eForm is still waiting for Supervisor approval.

![Form History](image1)

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

![Signature/Action Logs](image2)
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

<table>
<thead>
<tr>
<th>Add</th>
<th>Update</th>
<th>Certify</th>
<th>View</th>
</tr>
</thead>
<tbody>
<tr>
<td>Only GFM can add/create a new eForm.</td>
<td>Allows you to review and verify distribution lines and release for certification.</td>
<td>Allows you to review and certify applicable effort based on salary charged for a report(s).</td>
<td>Allows you to view report(s), including approval workflow and transaction log.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Business Manager</th>
<th>✓</th>
<th>✓</th>
<th>x</th>
<th>✓</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee</td>
<td>x</td>
<td>x</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Supervisor</td>
<td>x</td>
<td>x</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Principal Investigator</td>
<td>x</td>
<td>x</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>GFM Office</td>
<td>✓</td>
<td>✓</td>
<td>x</td>
<td>✓</td>
</tr>
</tbody>
</table>

Note: Business Managers, Employees, Supervisors, and PIs 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

<table>
<thead>
<tr>
<th>Time and Effort eForm Status</th>
<th>Status Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Saved</td>
<td>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.</td>
</tr>
<tr>
<td>Pending</td>
<td>Employees, Supervisors, &amp; PIs receive the reports in “Pending” status (because they are pending approval).</td>
</tr>
<tr>
<td>Partially Approved</td>
<td>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.</td>
</tr>
<tr>
<td>Executed</td>
<td>Once a report is fully certified, the report status is “Executed”.</td>
</tr>
<tr>
<td>On Hold</td>
<td>The employee, supervisor or PI have the Time and Effort Report on hold to verify the payroll information before certifying and submitting to the next level.</td>
</tr>
<tr>
<td>Withdrawn</td>
<td>The eForm has been withdrawn by the GFM Office and is no longer available to the Business Manager to release for certification.</td>
</tr>
</tbody>
</table>

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 their 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 their 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 the Time and Effort email notification received when a form is **routed** to the Employee, Supervisor, and Principal Investigator 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.