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 an employee’s effort.

**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 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.
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.

![Image of eForm](image.png)
Step 5: When your review is complete and you are ready to acknowledge the reported effort is reasonably reflected, click the **Acknowledgement** button to show **Yes**.

Notice the employee’s certification is complete.

Step 6: Click the **Comments** drop-down arrow, click on 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 7: Click the **Approve** button to complete your certification.
Step 8: Click the **View Approval Route** button to see the approval workflow.

Step 9: You can see that the eForm has now been approved by you, the Principal Investigator, and all other applicable Principal Investigators.

Step 10: 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 11:** Click the **Signature/Action Logs** drop-down arrow to view additional transaction log information.
If the effort is not reasonably reflected, follow steps 12 through 14.

**Step 12:** If the percentage on a distribution line(s) does not look reasonable, click the **Certify** button to show **No**. Notice when a line(s) is not certified, the Acknowledgement disappears.

**Step 13:** Be sure to clearly identify the problem 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 14:** To return the eForm back to the Business Managers for changes, click the **Recycle** button.

Next Steps:

- The report will be considered complete once all applicable PIs have completed their 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.

**Note:** If the Employee and PI or Supervisor and PI are the same person, approval will be automatic at the PI step.
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. Scroll down to the bottom of the page. When Supervisors click Search, a list of eForms will populate below the search criteria section of the page. Just click the employee name to view a report.

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 applicable 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

<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>✓</th>
<th>✓</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee</td>
<td>×</td>
<td>×</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Supervisor</td>
<td>×</td>
<td>×</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Principal Investigator</td>
<td>×</td>
<td>×</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>GFM Office</td>
<td>✓</td>
<td>✓</td>
<td>×</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 accidentally restarting workflow.
VI. Principal Investigator Responsibility

- Review the salary charged to ensure the percentage charged is a reasonable representation of how the employee spent their time on your award(s) where you are the Principal Investigator.
- Ensure the effort that is reported is consistent with effort reported within progress reports submitted to the sponsor.
- As Principal Investigator you are responsible overall for the expenses that are charged to the grant award. Inaccurate effort reports may result in punitive actions as noted in Federal and University Policies.
- 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.

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

CJ

Wednesday, March 4, 2020 at 8:38 PM

Show Details

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

https://hum-der.uci.edu/psp/npdev/EQ/DEV/EQFRAMEWORK/GENSEARCHFLGLOBALS/GENSEARCHFLAction=HCMFORM_FAMILYACCOUNT&FORM_ID=144842&HCMFORM_TASK=EV

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
UCRSC Controller’s Office