Controller’s Office – Grants and Funds Management

Time and Effort Reporting – Supervisor

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 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.

**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**.
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.
**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.
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.

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.

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

![View Approval Route]

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

![Signature/Action Logs]
IV. Time and Effort eForm Actions

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

<table>
<thead>
<tr>
<th>Time and Effort eForm Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Add</strong></td>
</tr>
<tr>
<td>Only GFM can add/create a new eForm.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Role</th>
<th>Add</th>
<th>Update</th>
<th>Certify</th>
<th>View</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business Manager</td>
<td>×</td>
<td>✓</td>
<td>×</td>
<td>✓</td>
</tr>
<tr>
<td>Employee</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>Supervisor</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, 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

<table>
<thead>
<tr>
<th>Time and Effort eForm Status</th>
<th>Status Description</th>
</tr>
</thead>
</table>
| 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, Supervisors, & PIs 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 GFM 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. 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 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.