



UNIVERSITY OF
SOUTH CAROLINA

**New Time and Effort Reporting System
BUSINESS MANAGER DEMO
Grants and Funds Management
Controller's Office**

Agenda

- Summary of eForm Updates
- Time and Effort eForm Demo
- Using HCM Distribution to Verify Time and Effort
- Understand Responsibilities
- Where to find Resources
- Contact Information



Summary of eForm Updates

- Changed the workflow order. The eForm will route to PIs for approval before Supervisors.
- You can now view workflow **prior** to approving the form.
- You can now view pending and approved forms using the **View a Grant Report** option.
- Updated the certification language to include “To the best of my knowledge and belief..”
- PIs can now toggle funding lines where they are listed as the PI, unless they are also listed as the Supervisor.



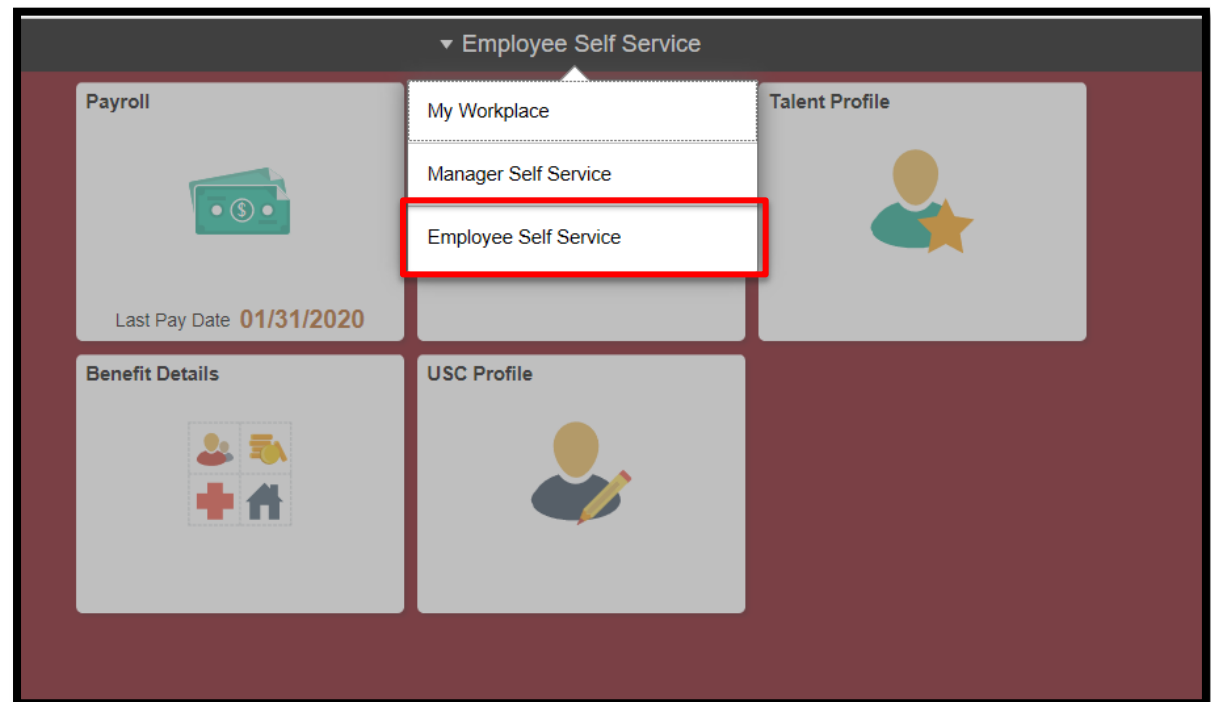
Who Should Expect a T&E Report?

- A T&E Report will automatically be generated for any individual where a portion of their salary is:
 - Directly charged to a sponsored project and/or
 - Used as cost share on a sponsored project
 - Include **HOURLY** employees (students, temporary workers, etc.)
- ***GFM will generate the reports and send a mass notification to Business Managers when they are ready!***



Email Notification

- Once you receive email notification that reports are ready, login into HCM – My Workplace and select the Grant Time and Effort Tile




New Time and Effort eForm Demonstration

Business Manager – Releasing the eForm



Verifying Time and Effort in HCM Distribution

 UNIVERSITY OF SOUTH CAROLINA HUB ▾ HCM DISTRIBUTION ▾ HCM DISTRIBUTION SEARCH Sign out

USCID <input type="text"/>	Pay Group <input type="text"/>	Combo <input type="text"/>	Project BU <input type="text"/>	From Pay Period 01/15/2020 ▾	Num of Records <input type="text" value="10000"/>
Name <input type="text"/>	Pay End Date (m/d/y) <input type="text"/> to <input type="text"/>	Operating Unit <input type="text"/>	Project <input type="text"/>	To Pay Period 06/30/2020 ▾	Order By Chartfield,Name ▾
Job <input type="text"/>	Earn End Date (m/d/y) <input type="text"/> to <input type="text"/>	Department <input type="text"/>	CFDA <input type="text"/>	Fiscal Month ALL ▾	<input checked="" type="checkbox"/> Total
HCM Dept. <input type="text"/>	Dist.Status ALL ▾	Fund <input type="text"/>	Contract <input type="text"/>	Fiscal Year ALL ▾	<input checked="" type="checkbox"/> Sub-Total
Journal <input type="text"/>	Dist.Type ALL ▾	Class <input type="text"/>	Sponsor <input type="text"/>	Pay Run ID <input type="text"/>	<input checked="" type="checkbox"/> Detail
Check <input type="text"/>	Dist.Class ALL ▾	Account <input type="text"/>	Costshare <input type="text"/>		<input checked="" type="checkbox"/> Sum.Adjustments
Check Date (m/d/y) <input type="text"/> to <input type="text"/>	Dist.Code <input type="text"/>				Output Fringe-Summary[Ho ▾



Verifying Time and Effort in HCM Distribution

1			1920-7 : PAY0092452	UP03	620900	C12	01/15/2020	8000251167	01/15/2020	C00000003968	CL007-620900-E4078-456--10008359	2,483.33	20.00%
1			1920-7 : PAY0093458	UP03	620900	C12	01/31/2020	8000265082	01/31/2020	C00000003968	CL007-620900-E4078-456--10008359	2,483.33	20.00%
1			1920-8 : PAY0094290	UP03	620900	C12	02/15/2020	8000277884	02/14/2020	C00000003968	CL007-620900-E4078-456--10008359	2,483.34	20.00%
1			1920-8 : PAY0095402	UP03	620900	C12	02/29/2020	8000293089	02/28/2020	C00000003968	CL007-620900-E4078-456--10008359	2,483.34	20.00%
1			1920-9 : PAY0098390	UP03	620900	C12	03/15/2020	8000308894	03/13/2020	C00000003968	CL007-620900-E4078-456--10008359	3,104.16	25.00%
1			1920-9 : PAY0097270	UP03	620900	C12	03/31/2020	8000324826	03/31/2020	C00000003968	CL007-620900-E4078-456--10008359	215.57	1.74%
1			1920-10 : PAY0098996	UP03	620900	C12	04/30/2020	8000353787	04/30/2020	C00000003968	CL007-620900-E4078-456--10008359	3,104.15	25.00%
1			1920-11 : PAY0099866	UP03	620900	C12	05/15/2020	8000367479	05/15/2020	C00000003968	CL007-620900-E4078-456--10008359	3,104.15	25.00%
1			1920-11 : PAY0100820	UP03	620900	C12	05/31/2020	8000380086	05/29/2020	C00000003968	CL007-620900-E4078-456--10008359	3,104.15	25.00%
1			1920-12 : PAY0101523	UP03	620900	C12	06/15/2020	8000391860	06/15/2020	C00000003968	CL007-620900-E4078-456--10008359	3,104.15	25.00%
1			1920-12 : PAY0102721	UP03	620900	C12	06/30/2020	8000400927	06/30/2020	C00000003968	CL007-620900-E4078-456--10008359	3,104.15	25.00%
												28,773.82	
CL007-620900-E4078-456--10008359												28,773.82	
1			1920-10 : PAY0098996	UP03	620900	C12	04/30/2020	8000353787	04/30/2020	C00000000556	CL007-620900-E4078-456--10008372	3,104.18	25.00%
1			1920-11 : PAY0099866	UP03	620900	C12	05/15/2020	8000367479	05/15/2020	C00000000556	CL007-620900-E4078-456--10008372	3,104.18	25.00%
1			1920-11 : PAY0100820	UP03	620900	C12	05/31/2020	8000380086	05/29/2020	C00000000556	CL007-620900-E4078-456--10008372	3,104.17	25.00%
1			1920-12 : PAY0101523	UP03	620900	C12	06/15/2020	8000391860	06/15/2020	C00000000556	CL007-620900-E4078-456--10008372	3,104.18	25.00%
1			1920-12 : PAY0102721	UP03	620900	C12	06/30/2020	8000400927	06/30/2020	C00000000556	CL007-620900-E4078-456--10008372	3,104.18	25.00%
												15,520.89	
CL007-620900-E4078-456--10008372												15,520.89	
1			1920-7 : PAY0092452	UP03	620900	C12	01/15/2020	8000251167	01/15/2020	C00000003989	CL007-620900-E4078-456--10009608	6,829.17	55.00%
1			1920-7 : PAY0093458	UP03	620900	C12	01/31/2020	8000265082	01/31/2020	C00000003989	CL007-620900-E4078-456--10009608	6,829.18	55.00%
1			1920-8 : PAY0094290	UP03	620900	C12	02/15/2020	8000277884	02/14/2020	C00000003989	CL007-620900-E4078-456--10009608	6,829.16	55.00%
1			1920-8 : PAY0095402	UP03	620900	C12	02/29/2020	8000293089	02/28/2020	C00000003989	CL007-620900-E4078-456--10009608	6,829.16	55.00%
												27,316.67	
CL007-620900-E4078-456--10009608												27,316.67	
OYD, TIFFANY												149,000.04	



Verifying Time and Effort in HCM Distribution

NAME	USCID	FISCAL PERIOD :	JOURNAL	JOB	HCM DEPT	GROUP	PAY PERIOD	CHECK	CHK DATE	COMBO	CHARTFIELD	LBR \$	LBR %
		1920-7 :	PAY0092452	UP03	620900	C12	01/15/2020	8000251167	01/15/2020	A00000004674	CL007-620900-E4078-456--	3,104.17	25.00%
		1920-7 :	PAY0093458	UP03	620900	C12	01/31/2020	8000265082	01/31/2020	A00000004674	CL007-620900-E4078-456--	3,104.16	25.00%
		1920-8 :	PAY0094290	UP03	620900	C12	02/15/2020	8000277884	02/14/2020	A00000004674	CL007-620900-E4078-456--	3,104.17	25.00%
		1920-8 :	PAY0095402	UP03	620900	C12	02/29/2020	8000293089	02/28/2020	A00000004674	CL007-620900-E4078-456--	3,104.17	25.00%
		1920-9 :	PAY0096390	UP03	620900	C12	03/15/2020	8000308894	03/13/2020	A00000004674	CL007-620900-E4078-456--	9,312.51	75.00%
		1920-9 :	PAY0097270	UP03	620900	C12	03/31/2020	8000324826	03/31/2020	A00000004674	CL007-620900-E4078-456--	12,201.10	98.26%
		1920-10 :	PAY0098104	UP03	620900	C12	04/15/2020	8000340359	04/15/2020	A00000005580	CL007-620900-E4078-456--	12,416.67	100.00%
		1920-10 :	PAY0098996	UP03	620900	C12	04/30/2020	8000353787	04/30/2020	A00000004674	CL007-620900-E4078-456--	6,208.34	50.00%
		1920-11 :	PAY0099886	UP03	620900	C12	05/15/2020	8000367479	05/15/2020	A00000004674	CL007-620900-E4078-456--	6,208.34	50.00%
		1920-11 :	PAY0100620	UP03	620900	C12	05/31/2020	8000380086	05/29/2020	A00000004674	CL007-620900-E4078-456--	6,208.35	50.00%
		1920-12 :	PAY0101523	UP03	620900	C12	06/15/2020	8000391860	06/15/2020	A00000004674	CL007-620900-E4078-456--	6,208.34	50.00%
		1920-12 :	PAY0102721	UP03	620900	C12	06/30/2020	8000400927	06/30/2020	A00000004674	CL007-620900-E4078-456--	6,208.34	50.00%
												77,388.66	
CL007-620900-E4078-456--												77,388.66	



Earning Codes Included:

Earn Code	Description	Earn Code	Description	Earn Code	Description
ALR	Annual Leave Retro	HCP	Holiday Compensation Pay	RSR	Regular Treaty Student Retro
ALV	Annual Leave Taken	HCS	Holiday Compensation Student	RST	Supplement Retro Teach Treaty
AOR	AL OT Retro 1.5	HCT	Holiday Comp Time Teach	RTI	Interntional Teaching Regular
AOT	Alabama Overtime 1.5	HOL	Holiday	RTM	Retro Pay Manual
ASA	Administrative Salary Adjstmnt	HOR	Holiday Retro	RTO	Regular Pay Retro
ASR	Admin Salary Adj Retro	HOT	Holiday Pay Teaching Treaty	RTS	Retro Supp Student Treaty
ATS	A L Taken Student Treaty	HTS	Holiday Comp Taken Std Trty	S50	Sabbatical Pay 50 Per Cent
ATT	A L Taken Teaching Treaty	HTT	Holiday Comp Taken TchrTrty	S65	Sabbatical Pay 65 Per Cent
CBP	Call Back Pay	HZS	Hazardous Weather - Std Trty	SAB	Sabbatical
CBR	Call Back Retro	HZT	Hazardous Weather - Tchr Trty	SAL	Supplemental Annual Leave
CHR	Chair Professorship	IOR	International Other Retro	SAP	Special Assignment Pay
CHS	Chair Professor Student Treaty	IOS	OT Student Treaty 1.5	SAR	Sabbatical Retro
CHT	Chair Professor Teach Treaty	ITO	OT 1.5 Teaching Treaty Retro	SAS	Special Assgn Pay Stud Treaty
CMS	Comp Time Taken - Std Treaty	ITR	International Teaching Retro	SAT	Special Assign Teaching Treaty
CMT	Comp Time Taken	IVR	Intl Faculty Overload Retro	SCK	Sick Leave Taken
CPT	Comp Taken Tchr Treaty	LME	Leave Without Pay-Exmpt No Cmp	SCL	Sick Leave Lost
CTP	Compensation Time Paid	LMP	Leave Without Pay	SCR	Sick Leave Retro
CTS	Comp Time Student Treaty	LMS	Leave Without Pay-Exmpt No Cmp	SCT	Sick Pay Teacher Treaty
CTT	Comp Time Teacher Treaty	LMT	Leave Without Pay-Exmpt No Cmp	SFA	SUPP 20 Day Furlough SC12
EFM	Govt Pd FMLA - Hourly	LWS	Leave WO Pay Stud Treaty	SFB	Supp 20 Day Furlough SC11
EFS	Govt Pd FMLA - Sal Stud Treaty	LWT	Leave WO Pay Teaching Treaty	SFC	Sup 20 Day Furlough SC105
EFT	Govt Pd FMLA - Teach Treaty	OCL	On Call	SFD	Sup 10 Day Furlough SC12
ELS	Govt Pd FMLA - Hrly Stud Treaty	ORA	AL OT Straight Retro	SFE	10 Day Furlough SC11
ELT	Govt Pd FMLA - Salary	OS1	OT Straight Time Stdt Treaty	SFF	Sup 10 Day Furlough
FPB	Furlough Pay Back	OSA	AL OT Straight	SFG	Sup Furlough 10 Day SC9
FRA	20 Day Furlough SC12	OSR	Overtime Straight Retro	SHD	HR Approved Differential
FRB	20 Day Furlough SC11	OSS	OT Straight Retro Stud Treaty	SHR	HR Approved Differential Retro
FRC	20 Day Furlough SC105	OST	OT Straight Retro Teach Treaty	SIR	Summer Instruction Retro
FRD	10 Day Furlough SC12	OT1	Overtime 1.5 Student Treaty	SLS	Sick Leave Taken Stud Treaty
FRE	10 Day Furlough SC11	OTA	Overtime Adj_No FLSA	SMI	Summer Instruction
FRF	10 Day Furlough SC105	OTH	Other Earnings	SMR	Summer Research
FRG	10 Day Furlough SC9	OTI	OT Straight Time Teach Treaty	SPR	Special Assignment Pay Retro
GE2	Govt Pd Lv - S Treaty SAL FAM	OTR	Overtime Pay 1.5 Retro	SRR	Summer Research Retro
GEO	Market Geographic Diff	OTS	Other Earnings Std Trty	SSL	Supplemental Sick Leave
GER	Market Geo Diff Retro	OTT	Other Earnings Tchr Trty	SVF	Supplemental Voluntary Furloug
GLS	Govt Pd Lv - S Treaty HRL EE	OVI	Overtime 1.5 TechingTreaty	TOC	Temp On Call
GLT	Govt Pd Lv - Treaty TEACH EE	OVR	OT 1.5 Student Treaty Retro	TSA	Temporary Salary Adjustment
GP2	Govt Pd Sick Leave - HRL FAM	OVS	Overtime Straight Time	TSR	Temp Salary Adj Retro
GPL	Govt Pd Sick Leave - HRL EE	OVT	Overtime Pay 1.5	TUI	Employee Tuition
GPT	Govt Pd Sick Leave - SAL EE	PEH	Premium Evening Hours	VAR	Variable Pay
GS2	Govt Pd Lv - S Treaty HRL FAM	PLV	Paid Leave	VAS	Variable Pay Student Treaty
GSA	Grant Salary Adjustment	PNH	Premium Night Hours	VAT	Variable Pay Teaching Treaty
GSR	Grant Salary Adj Retro	PPL	Paid Parental Leave	VFL	Voluntary Furlough
GSS	Govt Pd Lv - S Treaty SAL EE	PPS	Paid Parental Leave Std Trty	VFR	Voluntary Furlough
GST	Govt Pd Lv - T Treaty SAL FAM	PPT	Paid Parental Leave Tchr Trty	VFS	Voluntary Furlough Std Treaty
GT2	Govt Pd Sick Leave - SAL FAM	PRH	Premium Rotating Hours	VFT	Voluntary Furlough - Tchr Trty
HAS	Holiday Pay Student Treaty	PWH	Premium Weekend Hours	VPR	Variable Pay Retro
HAZ	Hazardous Weather	REG	Regular Pay	VSP	Voluntary Separation Prog Pay
HCM	Holiday Comp Taken	RS1	Regular Pay Student Treaty		



Earning Codes Excluded:

Earn Code	Description	Earn Code	Description	Earn Code	Description
BNS	Bonus Student Treaty	MOV	Moving Expenses	HOU	Housing Allowance Cash
ALL	Annual Leave Lost	AFT	Athletic Fringe Teach Treaty	HAT	Housing Allowance Teach Treaty
ATH	Athletics Fringe Benefits	AWT	Monetary Cash Awd Teach Treaty	IOV	International Faculty Overload
ACF	Athletic Fringe Car	BNT	Bonus Teaching Treaty	ISV	Intl Fac Overload Std Trty
TFB	Taxable Fringe Benefits	FOR	Faculty Overload Retro	MOS	Moving Expenses Student
TFT	Taxable Fringe Ben Teach Trty	ADP	Adoption Assistance	ALS	AL Payout Student Treaty
TFS	Taxable Frg Ben Std Trty	AL3	Annual Leave Payout Class III	MOT	Moving Expenses Teaching
BON	Bonus	ALT	AL Payout Teaching Treaty	SLT	Sick Leave Lost Teacher
STB	State Approved Bonus	RBU	Referral Bonus Upstate Law Enf	SLL	Sick Leave Lost Student
SBI	State Approved Bonus_Intl	ENP	Paid Not Earned	BOT	Board of Trustees
AWD	Monetary Cash Awards	ALP	Annual Leave Payout	RSV	Intl FaC Overload Retro Std
AWS	Monetary Cash Student Treaty	SBS	State Approved Bonus_Intl Stu	MEP	Media Engagement Pay
\$AC	All Earnings Codes - System Cd	RET	Non Monetary Awd Teach Treaty	OVP	Overpayment Deduction
\$NA	N/A - Retro Place Holder	THB	Taxable Housing Benefit	CAR	Car Allowance Cash
MET	Moving Expenses Teache	CNB	Critical Need Bonus	CAT	Car Allowance Teach Treaty
ATC	Athletic Contract Pay	FOV	Faculty Overload		
XRG	Earnings Balances	PNE	Paid Not Earned		



eForm Workflow

- Forms begin with the Business Manager verification and then workflow to:
 - Employee for certification
 - Principal Investigators (of applicable projects) for certification
 - Primary Supervisor of Employee for certification
- Email notifications are sent at each step alerting the individual an action is needed.
- Employees, PI(s), and Supervisors have the option to recycle the form if corrections are needed.
- If a form is recycled by an individual, it will return to the Business Manager (and an email notification will be generated)
- A Form will also be automatically recycled if a retro funding change is processed that affects or changes an already created effort report (regardless of where it is in the approval routing).



eForm Status

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

8 rows

Form ID	Employee Name	Reporting Period	Primary Department	Form Status	Last Operator	Last Date	Form Type	Empl ID
1 144849	Potter, Harry James	April - November 2019	152400	Pending	PERKINTD	2020-03-06	GRANT_TE	X99988888



eForm Status Options

- Business Manager – Receives the reports in **“Saved”** status and submits or releases them to Employees for certification.
- Employees, Pls & Supervisors receive the reports in **“Pending”** status (because they are pending approval)
- If a report is recycled at any point, the report will return to the Business Manager in a **“Partially Approved”** Status
- Once a report is fully certified, the report status is **“Executed”**.

Use View Option to review form status, not Update! (to prevent accidentally restarting workflow)



Business Manager Responsibilities

- To serve as central point of contact for Time and Effort certification.
- To assist employees, PIs, and supervisors with certification process.
- Training aids and tools are available.
 - Video Demos are available demonstrating each approver role (Employee, PI, and Supervisor)
 - Training Aids for each role are also available



Where to Find Resources

The screenshot shows the website for the Office of the Controller at the University of South Carolina. The page is titled "Office of the Controller" and features a navigation menu on the left with the following items: Office of the Controller, General Accounting, Grants and Funds Management (highlighted), Grants and Funds Staff Directory, Supplier and Tax Management, Cash and Treasury Management, Financial Reports and Transparency, Chart of Accounts, Policies and Procedures, and Contact Us. The main content area is titled "Grants and Funds Management" and includes a description: "Grants and Funds Management is responsible for the accounting and management of all restricted grants and contracts within the university system." Below this is a section titled "Our Services" which lists the following tasks: monitors all sponsored programs, reviews expenses for compliance with grant terms and Uniform Guidance, prepares and submits all invoices for sponsored programs, applies payments, and performs collections as necessary; prepares all financial reporting, and provides financial status information for sponsors; manages external sponsor audits and desk reviews; responsible for set up of all sponsored programs in PeopleSoft; responsible for close out of all sponsored program awards in PeopleSoft; and prepares and negotiates indirect cost rate agreement. To the right of the "Our Services" section is a "Contact Grants and Funds Management" box containing contact information for Marie Baka (Assistant Director, BAKA@mailbox.sc.edu) and Alex Pitts (Senior Manager - Accounts Receivable and Billing, PITTSMA@mailbox.sc.edu). At the bottom of the page, there are two expandable sections: "GFM Staff by Departmental Assignments" and "Webinars and Training". The "GFM Staff by Departmental Assignments" section includes links for Sponsored Programs Close Out, F&A Allocations, and Information Links for Grants and Contracts. The "Webinars and Training" section includes links for Introduction to Grants Management, Grant Dashboard Reporting Tool, Post Award and Grant Closeout, Uniform Guidance and Effort Reporting, HCM Payroll Distribution Reporting Tool, New Time and Effort Reporting System, and New Cost Transfer Policy and Retro Funding Change.



- The Full Webinar on Time & Effort and our training on how to use HCM Distribution can also be found here!

Questions?



Contact:

Grants and Funds Management Office

gfmecert@mailbox.sc.edu





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