



**Office of the Controller
Compliance Team
Time and Effort Reporting - Employee**

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I. Objectives

By the end of this procedure, you should be able to:

- Navigate in HCM PeopleSoft
- Verify Time and Effort Report eForms
- Approve Time and Effort Report eForms

II. Navigation in HCM PeopleSoft

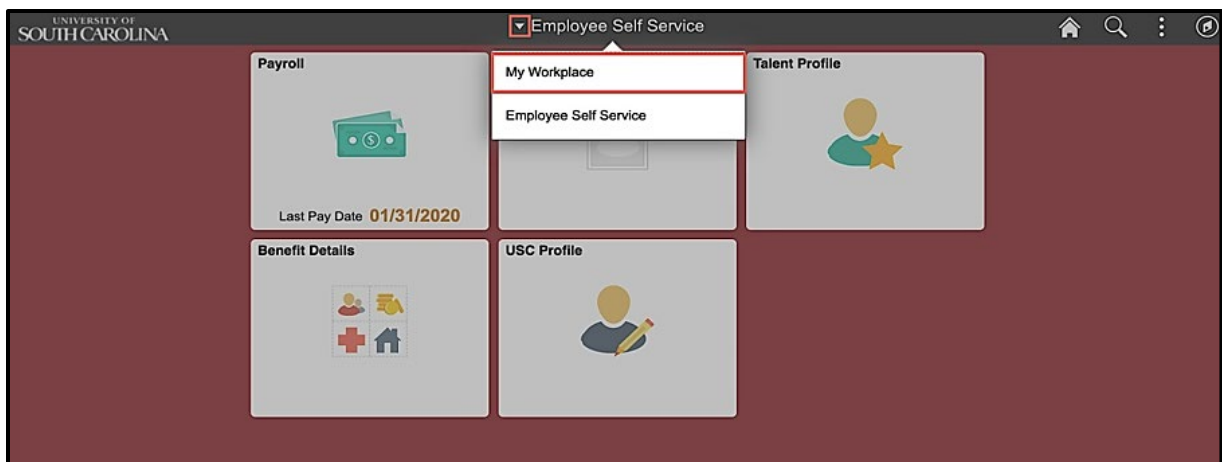
To access Time and Effort reporting, navigate to [PeopleSoft HCM](#). To view the Time and Effort home screen navigate to:

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

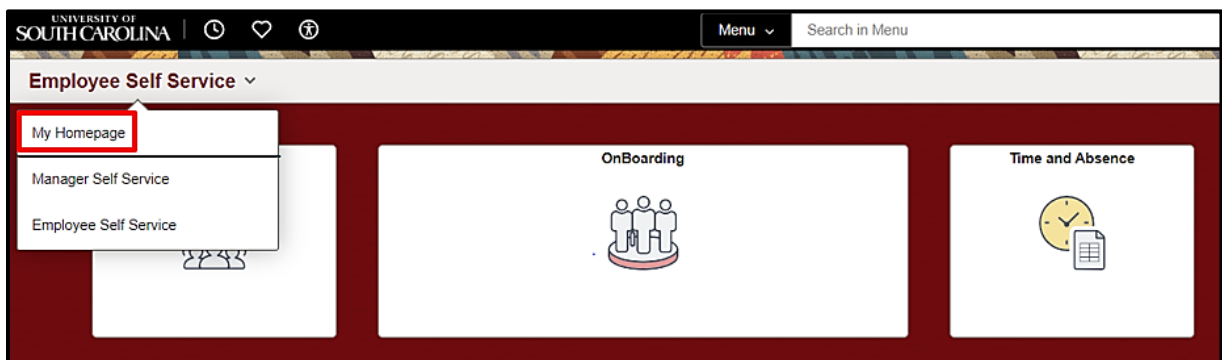
Step 1: Click the **Employee Self Service** drop-down arrow.

Step 2: Click the **My Workplace** or **My Homepage** option from the list.

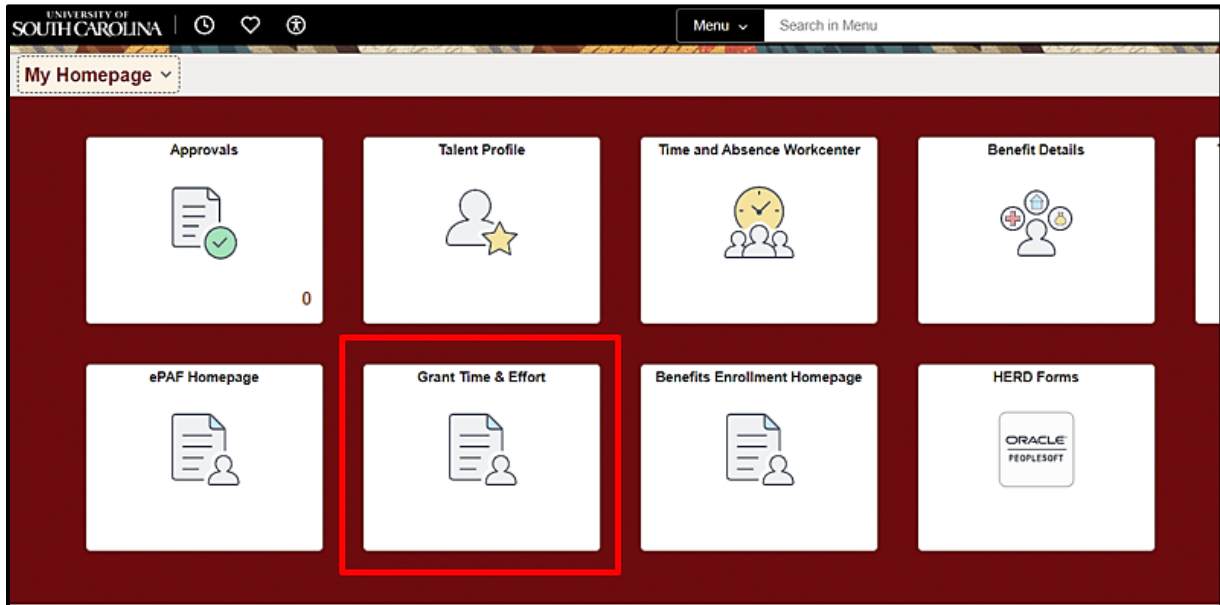
Note: Each individual's specific access will determine whether the My Workplace or My Homepage option appears – both lead to the Grant Time & Effort tile).



Or



Step 3: Click the **Grant Time & Effort** tile.



III. Verifying and Approving Time and Effort Report eForms

It is now time for you to certify and acknowledge that the payroll percentages captured on the employee's time and effort report reasonably reflect their actual time/effort.

If you have questions regarding any reports, please contact your Business Manager. You may also contact the Controller's Office Compliance Team at timeandeffort@sc.edu for assistance with any questions your Business Manager cannot address.

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

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

 A screenshot of the 'Account' page in the system. The page has a dark red header with a search bar. Below the header, there is a sidebar on the left with three tabs: 'Grant Time & Effort Forms', 'Certify a Grant Report' (highlighted with a red box), and 'View a Grant Report'. The main content area contains a search form with the following fields: 'Form ID' (Begin With), 'Employee Name' (Begin With), 'Reporting Period' (Begin With), 'Primary Department' (Begin With), 'Form Status' (is Equal To), 'Form Type' (is Equal To), and 'Empl ID' (Begin With). At the bottom of the search form, there are three buttons: 'Search' (highlighted with a red box), 'Clear', and 'Save Search'.

Step 4: Review the earnings and percent of pay charged to each distribution (e.g., project, department) during the reporting period for reasonableness.

If you need additional information, click the **Details** button to view the specific paycheck and pay periods included in the distribution.

Line Detail

Department: INST FAMILIES IN SOCTY
 Project: [REDACTED]
 Chartstring: CL061 100100 G1000 51300 201

Earnings End Date	Check Date	Empl Rcd	Earn Code	Earnings
01/15/2024	01/12/2024	0	HOL	-128.40
01/15/2024	01/12/2024	0	HOL	1028.94
01/15/2024	01/12/2024	0	REG	-613.48
01/15/2024	01/12/2024	0	REG	4916.06
01/31/2024	01/31/2024	0	REG	-741.88
01/31/2024	01/31/2024	0	REG	5945.00
02/15/2024	02/15/2024	0	REG	-741.88
02/15/2024	02/15/2024	0	REG	5945.00
02/29/2024	02/29/2024	0	REG	-741.88
02/29/2024	02/29/2024	0	REG	5945.00
03/15/2024	03/15/2024	0	REG	-741.88
03/15/2024	03/15/2024	0	REG	5945.00
03/15/2024	03/15/2024	0	REG	-118.90
03/30/2024	03/29/2024	0	REG	4280.38
03/30/2024	03/29/2024	0	REG	-118.90
04/15/2024	04/15/2024	0	REG	-118.90
04/15/2024	04/15/2024	0	REG	3031.95
04/30/2024	04/30/2024	0	REG	3031.95
04/30/2024	04/30/2024	0	REG	-118.90
05/15/2024	05/15/2024	0	REG	3031.95
05/15/2024	05/15/2024	0	REG	-118.90
05/31/2024	05/31/2024	0	HOL	262.38
05/31/2024	05/31/2024	0	REG	2799.57
06/15/2024	06/14/2024	0	REG	3031.96
06/29/2024	06/29/2024	0	REG	3031.96

Sponsored Accounts

Certified?	Earnings	Percent of Pay/Computed Effort	Details	Project/Grant
<input type="checkbox"/>	47893.20	67.13	Details	10013027 TEC
<input type="checkbox"/>	7490.63	10.50	Details	10013408 Pro
<input type="checkbox"/>	594.50	0.83	Details	10013880 State Maternal Health Inn

Step 5: If you feel the percentages reasonably reflect the actual time/effort the employee spent on each activity, leave all Certified fields toggled to for each line (in both the Sponsored Accounts and University Accounts sections).

Sponsored Accounts

Certified?	Earnings	Percent of Pay/Computed Effort	Details	Project/Grant	Department	Cost Share	Op Unit/Dept/Fund/Acct/Class
<input checked="" type="checkbox"/>	47893.20	67.13	Details	10013027 TECHNICAL ASSISTANCE AND	100100		CL061 100100 G1000 51300 201
<input checked="" type="checkbox"/>	7490.63	10.50	Details	10013408 Project 6: Statewide SNAP	115400		CL034 115400 F1000 51300 301
<input checked="" type="checkbox"/>	594.50	0.83	Details	10013880 State Maternal Health Inn	100100		CL061 100100 F1000 51300 201

Subtotal 55978.33
 Percent Subtotal 78.46

Step 6: If you are interested in viewing the workflow approval route, including the specific approvers included in the workflow (Employee > PI > Supervisor), click the **View Approval Routing** button.

Then click the **Cancel** button to return to the report page.

Parallel Stage	
> G3FORM_ID=803854, PROJECT_ID=10013308	Initiated
> G3FORM_ID=803854, PROJECT_ID=10013349	Initiated
> G3FORM_ID=803854, PROJECT_ID=10013403	Initiated
> G3FORM_ID=803854, PROJECT_ID=10013404	Initiated
> G3FORM_ID=803854, PROJECT_ID=10013405	Initiated
> G3FORM_ID=803854, PROJECT_ID=10013406	Initiated
> G3FORM_ID=803854, PROJECT_ID=10013407	Initiated
> G3FORM_ID=803854, PROJECT_ID=10013408	Initiated

Step 7: When all lines are certified, acknowledge the reasonableness of the report by toggling the Acknowledgement field to ✓.

Note: The Acknowledgement section will not display until all lines are individually certified.

Step 8: If you would like to leave a comment on the report, click the **Comments** drop-down area to view the comment box. A common employee comment on a correct form is “This report appears reasonable.”

Note: Comments will be visible to all individuals who can view the report, including the Principal Investigator(s) and Supervisor included in the workflow approval route, your Business Manager, and the Controller’s Office Compliance Team.

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

Form Action Items 1 row

1	Acknowledgement	<input type="checkbox"/> 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**

This report appears reasonable.

Step 10: If you are interested in viewing the workflow approval route at this stage, including the specific approvers included in the workflow (Employee → PI → Supervisor), click the **View Approval Route** button.

You will see that the report has now been approved by you (in the Employee Stage), and is now pending with the Principal Investigator(s) of any sponsored awards you worked on during the reporting period. Once the Principal Investigator(s) approves, the report will route to your current Supervisor for final approval.

A few notes to remember about the Approval Route:

- The **Parallel Stage** will show all the PIs associated with the sponsored awards reflected on your report.
- If the Employee and the PI are the same person, the report will automatically approve at the Parallel Stage in the PI role after the employee approves.
- Similarly, if the PI and Supervisor are the same person, the report will automatically approve at the Supervisor Stage in the Supervisor role after the PI approves.
- It is possible for the report to be pending in multiple queues at the same time if the sponsored awards included in your effort reports are associated with different PIs.

Step 11: If you are interested in viewing additional detail on the report and certification, refer to the **Transaction / Signature Log** and **Action Item Log**.

Form Result

Time and Effort Reporting : Results

You have successfully approved your eForm.
The eForm has been routed to the next approval step.
multiple approvers.

View Approval Route

Transaction / Signature Log

Current Date Time	Step Title
1 12/11/2024 1:37:38PM	Saved
2 12/11/2024 1:40:52PM	Initiated
3 12/18/2024 5:39:29PM	Employee Oprid

Refresh Log

Action Item Log

Acknowledgement	Description
1 Yes	To the best of my knowledge, I confirm this report reflects all d
2 Yes	To the best of my knowledge and belief, I certify that the payro reports may result in punitive actions as noled in federal and

Print

View Approval Route

Review/Edit Approvers

Employee Stage

> G3FORM_ID=810133 Awaiting Further Approvals

Parallel Stage

∨ G3FORM_ID=810133, PROJECT_ID=10013027 Pending

Parallel Path

Pending

Principal investigator Project >

> G3FORM_ID=810133, PROJECT_ID=10013408 Pending

> G3FORM_ID=810133, PROJECT_ID=10013880 Pending

Supervisor Stage

> G3FORM_ID=810133 Awaiting Further Approvals

If you find that any of the applicable earnings or percentages captured in the report ARE NOT reasonably reflected, follow Steps 12 through 14 below.

Step 12: If you feel the percentages **do not** reasonably reflect the actual time/effort you spent on an activity, **do not** toggle the Certified field to ✓. Leave those fields in the default position.

Step 13: Click the **Comments** drop-down arrow and add a comment to clearly identify your concern/question, making it easier for your Business Manager to begin the process of requesting the necessary changes. **Comments are required for Recycled reports.**

*Note: Comments will be visible to **all** individuals who can view the report, including the Principal Investigator(s) and Supervisor included in the workflow approval route, your Business Manager, and the Controller's Office Compliance Team.*

Step 14: Click the **Recycle** button to return the report to your Business Manager for changes.

University Accounts						
	Certified? ¹	Earnings ¹	Percent of Pay/Computed Effort ¹	Details	Project/Grant ¹	Department ¹
1	<input type="checkbox"/>	41.91	0.08	Details		100100
2	<input checked="" type="checkbox"/>	62.87	0.12	Details		100100
		Subtotal 104.78	Percent Subtotal 0.19			
Total Qualifying Accounts						
		Total 53964.21	Percent Total 100.00			
View Approval Routing						
File Attachments						
Status	Action	Description ¹				
1	Upload	<input type="text"/>				
Add						
<div style="border: 1px solid red; padding: 5px;"> Comments Line 1 for University Accounts does not look correct to me. Please review and make all necessary changes. </div>						
<div style="border: 1px solid red; padding: 5px; display: inline-block;"> Search Recycle Hold Print Approve </div>						

Next Steps: Once the report has been corrected, your Business Manager will resubmit the report for recertification, at which point it will route back to you for approval (start back at **Step 1**). If a correction is requested at any step of the approval process, including the PI or Supervisor stages, it will require recertification.

IV. Time and Effort Report Actions

Below is a summary of each action available within the **Grant Time & Effort** tile, including who can perform each action (based on the assigned level of access).

Account

Grant Time & Effort Forms

- Add a Time and Effort Form
- Update a Grant Report
- Certify a Grant Report
- View a Grant Report

Welcome to the University of South Carolina's Time and Effort Reporting and Certification Center. This is where you will manage Time and Effort reports and required certification for employees.

Time and Effort reports can only be corrected by submitting a Retro Funding Change request to the RetroJJE mailbox at RetroJJE@mailbox.sc.edu. Once correction is processed, forms will automatically refresh and update.

The following actions can be performed through this center:

Update a Time and Effort Report – Allows you to manually refresh and capture any updates (as applicable) for a report(s).

Certify a Time and Effort Report – Allows you to review and certify applicable effort based on salary charged for a report(s).

View a Time and Effort Report – Allows you to view report(s).

Grant Time & Effort eForm Actions	Add	Update	Certify	View
	To create a new report	To validate reports and release them to approvers for certification	To review and certify applicable effort based on salary charged to a specific project/activity	To view reports, including the workflow approval route and transaction log
Business Manager	X	✓	X	✓
Employee	X	X	✓	✓
Principal Investigator	X	X	✓	✓
Supervisor	X	X	✓	✓
Controller's Office	✓	✓	X	✓

V. Time and Effort Report Statuses

Below is a summary of each effort report status, including the party responsible for next steps:

Status	Description	Responsible Party
Saved	Report still requires validation and release; no action has been taken, approvers have not received the report	Business Manager
Pending	Report is awaiting approval	Employee, PI, or Supervisor
Recycled	Issue/error identified during the certification process that requires correction; report will need to be revalidated/re-released and reapproved after resolution	Business Manager
Executed	Report is fully certified and complete	N/A – No further action required
Withdrawn	Should only be used by the Controller's Office	
On Hold	SHOULD NOT be used	

VI. Employee Responsibilities


- Review your effort report for accuracy in a timely manner (within three days of receipt).
- Electronically certify all lines on your effort report and provide a certification statement attesting to its reasonableness – all percentages should be representative of how you actually spent your time.
- Promptly communicate and coordinate with Business Managers regarding any identified inaccuracies and needed corrections.

VII. Email Notification

Below is an example of the email notification received when a report has routed to the Employee, Principal Investigator, and Supervisor for approval.

Click the link and you will be prompted to sign into HCM PeopleSoft (see Section I). If you are already logged into HCM PeopleSoft, it will take you directly to the report.

Approval Needed: **Personnel Administration Request** Effort Report, Form #775707



PeopleSoft@peoplesoft.com

To: **Time and Effort Reporting**, **Business Office**

☺
↩ Reply
↩ Reply All
➡ Forward
📧
⋮

Wed 10/30/2024 11:01 AM

A Time and Effort Report has been created for **Personnel Administration Request** for the January - June 2024 reporting period that requires review and approval. Please login into PeopleSoft HCM to approve this form or follow the link below.

https://hcm-prd.ps.sc.edu/psp/HPRD/EMPLOYEE/HRMS/c/G3FRAME.G3SEARCH_FL.GBL?Page=G3SEARCH_FL&Action=U&G3FORM_ID=775707&G3FORM_TASK=EVL

Certification is required to be completed promptly within 3 days of receipt. Failure to certify **may result in the movement of salary charges from sponsored award accounts to departmental accounts**, in accordance with University policy and procedure FINA 3.12. Do not reply to this email. If you have questions or need assistance, please contact your Business Manager.

*If you are an **Employee** attempting to certify your own report, you can find the training aid [here](#).*

*If you are a **Principal Investigator (PI)** attempting to certify another's report, you can find the training aid [here](#).*

*If you are a **Supervisor** attempting to certify an employee's report, you can find the training aid [here](#).*

Thank you for your prompt attention to this request.

Compliance Team

USC Controller's Office

timeandeffort@sc.edu