



UNIVERSITY OF  
**SOUTH CAROLINA**

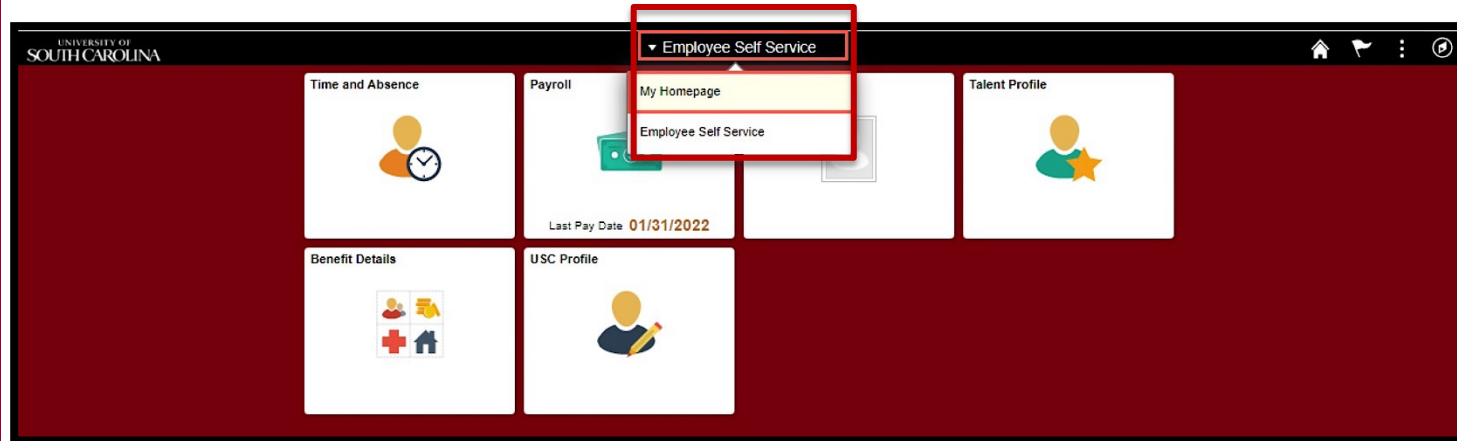
**NEW PeopleSoft HCM Dashboard Tile  
for Time and Effort Reporting  
Grants and Funds Management – Controller’s Office  
March 1, 2022**

# Agenda

- Where to find the New Dashboard Tile
- How to use the New Tool
- Demonstration
- Other Updates:
  - Updated Salary Cap Calculation Template
  - Updated Payroll Retro Funding Change Form
  - Use of FOV earnings code
- Tips for Verifying Effort Reports to HCM Distribution
- Where to find Resources
- Contact Information



# My Grant Reports Tile



- Log into PeopleSoft HCM at <https://hcm.ps.sc.edu/>
- Navigate to “My Homepage” or “My Workplace”



# My Grant Reports Tile

- Select the “My Grant Reports” tile

The screenshot displays a dashboard with a dark red background. At the top, there is a dropdown menu labeled "My Homepage". Below this, there are several report tiles:

- My Submitted eForms - Aging:** A bar chart showing "Days Since Form Created" on the y-axis (0 to 120) and "Age Group Since Form Created" on the x-axis. A single blue bar represents the "4+ Weeks" category, reaching approximately 100 days.
- Business Mgr T&E Report:** A 3D pie chart showing "100%" completion, with a legend indicating "2 Weeks".
- Time and Absence Workcenter:** A tile with a clock icon and three stylized figures.
- My Grant Reports:** A tile with a red border, featuring a computer monitor and a checklist icon.
- Grant Time & Effort:** A tile with a document icon and a checkmark.
- Affiliate Actions Homepage:** A tile with the "ORACLE PEOPLESFT" logo.
- Benefits Enrollment Homepage:** A tile with a document icon and a checkmark.
- ePAF Homepage:** A tile with a document icon and a checkmark.



# My Grant Reports

- Select the Report you would like to run:

The screenshot displays the HUAT (University of South Carolina) Grant Reports interface. The top navigation bar includes 'Favorites', 'Main Menu', 'My Homepage', 'Grant Reports', and 'Grant Reports'. The right side of the header features 'Home', 'Sign Out', 'Add To', 'Notification', and 'NavBar'. The main content area is titled 'Grant Reports' and contains a 'Queries' section with a dropdown menu. The dropdown menu is expanded, showing the following options: 'My Reports', 'My Saved Effort Reports', 'Effort Reports Pending Approval by Other', and 'Executed/Approved Effort Reports'. A red box highlights the 'My Reports' option. A larger inset window shows a detailed view of the 'My Reports' section, listing the same four options: 'My Saved Effort Reports', 'Effort Reports Pending Approval by Other', and 'Executed/Approved Effort Reports'.

# My Saved Effort Reports

## Report Name: My Saved Effort Reports

(USC\_GRANT\_TE\_ROSTER\_BUS\_MGR\_PV)

- Use this report to view all effort reports that currently have a “saved” status within your purview.
- This query will also show you the reporting period associated with each report.

USC\_GRANT\_TE\_ROSTER\_BUS\_MGR\_PV

Download results in: [Excel Spreadsheet](#) [CSV Text File](#) [XML File \(4 kb\)](#)

View All First 1-10 of 10 Last

Row	Form ID	Reporting Period	EMPLID	Name	Dept ID	# of Days Since Form Created	Age Group	Form Status
1	394639	July - December 2021	181400	Sharon Gentry King	181400		15 2 Weeks	Saved
2	395301	July - December 2021	181400	Sharon Gentry King	181400		15 2 Weeks	Saved
3	393855	July - December 2021	181400	Sharon Gentry King	181400		15 2 Weeks	Saved
4	395297	July - December 2021	181400	Sharon Gentry King	181400		15 2 Weeks	Saved
5	394821	July - December 2021	181400	Sharon Gentry King	181400		15 2 Weeks	Saved
6	395120	July - December 2021	181400	Sharon Gentry King	181400		15 2 Weeks	Saved
7	394158	July - December 2021	181400	Sharon Gentry King	181400		15 2 Weeks	Saved
8	393700	July - December 2021	181400	Sharon Gentry King	181400		15 2 Weeks	Saved
9	393360	July - December 2021	181400	Sharon Gentry King	181400		15 2 Weeks	Saved
10	395353	July - December 2021	181400	Sharon Gentry King	181400		15 2 Weeks	Saved



# Effort Reports Pending Approval by Other

**Report Name:** Effort Reports Pending Approval by Other (SC\_MY\_GRANT\_FORMS\_PENDING)

- Use this report to view all effort reports that are currently in a “PENDING” status within your purview.
- This query will show you the name and email address of each pending approver associated with the report.

SC\_MY\_GRANT\_FORMS\_PENDING- My Grant Forms

Download results in: [Excel Spreadsheet](#) [CSV Text File](#) [XML File](#) (2 kb)

View All First 1-4 of 4 Last

Row	Form ID	Form Status	Employee ID	Employee Name	Dept ID	Reporting Period	Reporting Period ID	Approver's Name	Approver's Email
1	392882	Pending	[REDACTED]	[REDACTED]	181400	July - December 2021	9	Dibattisto, Caroline Hill	xxCAROLINE.DIBATTISTO@uscmed.sc.edu
2	392635	Pending	[REDACTED]	[REDACTED]	181400	July - December 2021	9	Brown, Daniel Craig	xxDAN.BROWN@uscmed.sc.edu
3	392635	Pending	[REDACTED]	[REDACTED]	181400	July - December 2021	9	Knight, Lisa Marie	xxLISA.KNIGHT@uscmed.sc.edu
4	392757	Pending	[REDACTED]	[REDACTED]	181400	July - December 2021	9	Walker, Roy	xxROY.WALKER@uscmed.sc.edu



# Executed/Approved Effort Reports

**Report Name:** Executed/Approved Effort Reports  
(USC\_GRANT\_TE\_EXECUTED\_FORMS)

- Use this report to view all effort reports that have been fully approved or executed.
- Approval Date (greater than or approved after MM/DD/YYYY),  
Reporting Period ID (Optional).

USC\_GRANT\_TE\_EXECUTED\_FORMS

\*Approved Date (>) 01/01/2021

Reporting Period ID (optional)

View Results

Download results in: [Excel SpreadSheet](#) [CSV Text File](#) [XML File \(13 kb\)](#)

View All First 1-37 of 37 Last

Row	Form ID	Period ID	Reporting Period	EMPLID	Name	Dept ID	Approved Date	Form Status
1	263162		7 July - December 2020			181400	02/24/2021	Executed
2	262140		7 July - December 2020			181400	02/16/2021	Executed
3	319070		8 January - June 2021			181400	08/18/2021	Executed
4	262883		7 July - December 2020			181400	03/04/2021	Executed
5	319868		8 January - June 2021			181400	08/30/2021	Executed
6	261228		7 July - December 2020			181400	03/03/2021	Executed
7	318095		8 January - June 2021			181400	08/30/2021	Executed
8	263100		7 July - December 2020			181400	02/11/2021	Executed
9	276092		7 July - December 2020			181400	04/09/2021	Executed
10	320546		8 January - June 2021			181400	08/05/2021	Executed
11	261277		7 July - December 2020			181400	02/10/2021	Executed
12	263516		7 July - December 2020			181400	02/11/2021	Executed
13	320542		8 January - June 2021			181400	08/16/2021	Executed
14	263043		7 July - December 2020			181400	02/15/2021	Executed





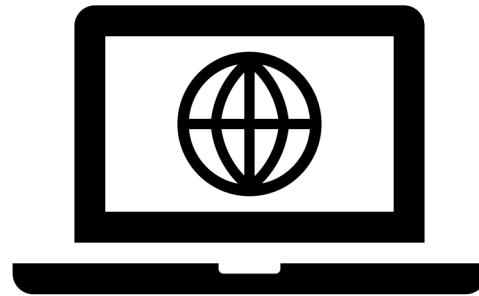
# Reporting Period IDs

Reporting Period ID	Reporting Period Name
1	April – December 2019
6	January – June 2020
7	July – December 2020
8	January – June 2021
9	July – December 2021

Future Report IDs will be added as they are created within the system. The Reporting Period ID will increase by one as they are added. For example, the next reporting cycle of January – June 2022 will have the Reporting Period ID of “10”.



# Demonstration



# Salary Cap Calculation Template

- In order to help with salary distribution allocations related to Salary Caps, we've developed the following Excel spreadsheet template to assist.
- Template has been **updated to include two tabs**:
  - 9 Month Appointments
  - 12 Month Appointments
- You can find this updated template here:
  - [Salary Cap Calculation Workbook Template](#)



# Payroll Retro Funding Change Form

- We have updated the Payroll Retro Funding Change Form.
- Please make sure you are using the current Payroll Retro Funding Change form.

UNIVERSITY OF SOUTH CAROLINA									
PAYROLL RETRO FUNDING CHANGE									
TO BE COMPLETED BY THE DEPARTMENT									
USC ID:			NAME (Last, First):				PAY GROUP:		
JUSTIFICATION/NOTES (Cost Transfer Justification Form must be completed and attached if a USCSP project is part of the transaction).									
PAYCHECK DATE:		Has this paycheck date previously been moved via a Retro Funding Change Journal Entry?					YES <input type="checkbox"/>		NO <input type="checkbox"/>
CURRENT DISTRIBUTION									
OPER UNIT	DEPT	FUND	ACCOUNT	CLASS	BUSINESS UNIT	PROJECT #	COST SHARE	COMBO CODE	AMOUNT
TOTAL RETRO FUNDING CHANGE									\$ 0.00
NEW DISTRIBUTION									
OPER UNIT	DEPT	FUND	ACCOUNT	CLASS	BUSINESS UNIT	PROJECT #	COST SHARE	COMBO CODE	AMOUNT
TOTAL RETRO FUNDING CHANGE									\$ 0.00

# Helpful Forms, Tools, and Templates:

## Office of the Controller

- Office of the Controller
- General Accounting
- Grants and Funds Management**
- Grants and Funds Staff Directory
- Supplier and Tax Management
- Cash and Treasury Management
- Financial Reports and Transparency
- Chart of Accounts
- Policies and Procedures
- Contact Us

### Grants and Funds Management

Grants and Funds Management is responsible for the accounting and management of all restricted grants and contracts within the university system.

#### Our Services

The Grants and Funds Management team:

- 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
- prepares and negotiates indirect cost rate agreement

#### Contact Grants and Funds Management

For questions about any Grants and Funds Management services, please contact us directly:

**Denise Koon**  
Senior Director of Grants and Funds Management  
[ddkoon@mailbox.sc.edu](mailto:ddkoon@mailbox.sc.edu)

**Alex Pitts**  
Senior Manager – Accounts Receivable and Billing  
[pittsma@mailbox.sc.edu](mailto:pittsma@mailbox.sc.edu)

GFM Staff by Departmental Assignments	Expand all +
Sponsored Programs Close Out	+
Indirect Cost Job Aids	+
Information Links for Grants and Contracts	+
Subrecipients and Subawards	+
<b>Helpful Forms, Tools, and Templates</b>	-

- [Salary Cap Calculation Template \[xlsx\]](#)
- [Cost Transfer Justification Form \[pdf\]](#)
- [Payroll Retro Funding Change Form \[pdf\]](#)



# Faculty Overloads (FOV)

- The Earnings Code “FOV” is used to record faculty overloads and are not allowed to be charged directly to Grants.
- If you have a faculty member that is required to teach an additional course **as part of a grant requirement**, use the earnings code of “GSA” to process the earnings related to that grant specific overload.
- **This will ensure effort is properly recorded.**



# Tips for Verifying Effort Reports using HCM Distribution

Time and Effort Reporting : Time and Effort Report Form ID [REDACTED]

**Employee Information**

Employee Name [REDACTED] Empl ID [REDACTED]

Primary Department [REDACTED]

Reporting Period July - December 2021

Report Period Begin Date 07/01/2021 Report Period End Date 12/31/2021

**Sponsored Accounts**


Certified? ▾	Earnings ▾	Percent of Pay ▾	Details	Project/Grant ▾	Department ▾	Cost Share ▾	Op Unit/Dept/Fund/Acct/Class ▾
1	Yes	7250.01	15.06	<input type="button" value="Details"/>	10007140 Teaching with Primary Sources	157000	CL070 157000 F1000 51300 301
		Subtotal 7250.01	Percent Subtotal 15.06				

**University Accounts**

Certified? ▾	Earnings ▾	Percent of Pay ▾	Details	Project/Grant ▾	Department ▾	Cost Share ▾	Op Unit/Dept/Fund/Acct/Class ▾
1	Yes	3000.00	6.23	<input type="button" value="Details"/>	157000		CL070 157000 E8036 51300 301
2	Yes	37881.99	78.70	<input type="button" value="Details"/>	157117		CL070 157117 A0001 51300 101



# HCM Distribution

 UNIVERSITY OF SOUTH CAROLINA

HUB ▾ HCM DISTRIBUTION ▾ HCM DISTRIBUTION SEARCH Sign out

<b>USCID</b> <input type="text"/>	<b>Supervisor USCID</b> <input type="text"/>	<b>Pay Group</b> <input type="text"/>	<b>Combo</b> <input type="text"/>	<b>Project BU</b> <input type="text"/>	<b>From Pay Period</b> 07/15/2021 ▾	<b>Num of Records</b> <input type="text" value="10000"/>
<b>Name</b> <input type="text"/>	<b>Empl.Rcd</b> <input type="text"/>	<b>Pay End Date (m/d/y)</b> <input type="text"/> to <input type="text"/>	<b>Operating Unit</b> <input type="text"/>	<b>Project</b> <input type="text"/>	<b>To Pay Period</b> 12/31/2021 ▾	<b>Order By</b> Chartfield,Name ▾
<b>Job</b> <input type="text"/>	<b>Empl.Class</b> <input type="text"/>	<b>Earn End Date (m/d/y)</b> <input type="text"/> to <input type="text"/>	<b>Department</b> <input type="text"/>	<b>CFDA</b> <input type="text"/>	<b>Fiscal Month</b> ALL ▾	<input checked="" type="checkbox"/> <b>Total</b>
<b>HCM Dept.</b> <input type="text"/>	<b>Full/Part</b> All ▾	<b>Dist. Status</b> ALL ▾	<b>Fund</b> <input type="text"/>	<b>Contract</b> <input type="text"/>	<b>Fiscal Year</b> ALL ▾	<input checked="" type="checkbox"/> <b>Sub-Total</b>
<b>Journal.</b> <input type="text"/>	<b>Reg/Temp</b> All ▾	<b>Dist. Type</b> ALL ▾	<b>Class</b> <input type="text"/>	<b>Sponsor</b> <input type="text"/>	<b>Pay Run ID</b> <input type="text"/>	<input checked="" type="checkbox"/> <b>Detail</b>
<b>Check</b> <input type="text"/>	<b>Std. Hours</b> <input type="text"/>	<b>Dist. Class</b> ALL ▾	<b>Account</b> <input type="text"/>	<b>Costshare</b> <input type="text"/>	<b>Output</b> Fringe-Summary[Hor ▾	<input checked="" type="checkbox"/> <b>Sum.Adjustments</b>
<b>Check Date (m/d/y)</b> <input type="text"/> to <input type="text"/>	<b>HCM BU [Campus]</b> All ▾	<b>Dist. Code</b> <input type="text"/>				





# HCM Distribution

NAME	USCID	FISCAL PERIOD : JOURNAL	JOB	HCM DEPT	GROUP	PAY PERIOD	CHECK	CHK DATE	COMBO	CHARTFIELD	LBR \$
XXXXXXXXXX	XXXXXXXXXX	2122-1 : PAY0123964	VSUM	157000	SRC	07/15/2021	XXXXXXXXXX	07/15/2021	A00000006642	CL070-157000-F1000-301-10007140-	2,416.67
XXXXXXXXXX	XXXXXXXXXX	2122-1 : PAY0124738	VSUM	157000	SIC	07/31/2021	XXXXXXXXXX	07/22/2021	A00000006642	CL070-157000-F1000-301-10007140-	411.09
XXXXXXXXXX	XXXXXXXXXX	2122-1 : PAY0125017	VSUM	157000	SRC	07/31/2021	XXXXXXXXXX	07/30/2021	A00000006642	CL070-157000-F1000-301-10007140-	2,416.67
XXXXXXXXXX	XXXXXXXXXX	2122-2 : PAY0125851	VSUM	157000	SRC	08/15/2021	XXXXXXXXXX	08/13/2021	A00000006642	CL070-157000-F1000-301-10007140-	2,416.67
XXXXXXXXXX											7,861.10
CL070-157000-F1000-301-10007140-											7,861.10
XXXXXXXXXX	XXXXXXXXXX	2122-1 : PAY0123964	VSUM	157000	SRC	07/15/2021	XXXXXXXXXX	07/15/2021	A00000052613	CL070-157117-A0001-101--	(411.09)
XXXXXXXXXX	XXXXXXXXXX	2122-1 : PAY0124738	VSUM	157000	SIC	07/31/2021	XXXXXXXXXX	07/22/2021	A00000052613	CL070-157117-A0001-101--	(411.09)
XXXXXXXXXX	XXXXXXXXXX	2122-2 : PAY0128765	UG74	157000	C09	08/31/2021	XXXXXXXXXX	08/31/2021	A00000052558	CL070-157117-A0001-101--	4,209.11
XXXXXXXXXX	XXXXXXXXXX	2122-3 : PAY0127576	UG74	157000	C09	09/15/2021	XXXXXXXXXX	09/15/2021	A00000052558	CL070-157117-A0001-101--	4,209.11
XXXXXXXXXX	XXXXXXXXXX	2122-3 : PAY0128464	UG74	157000	C09	09/30/2021	XXXXXXXXXX	09/30/2021	A00000052558	CL070-157117-A0001-101--	4,209.11
XXXXXXXXXX	XXXXXXXXXX	2122-4 : PAY0129481	UG74	157000	C09	10/15/2021	XXXXXXXXXX	10/15/2021	A00000052558	CL070-157117-A0001-101--	4,209.11
XXXXXXXXXX	XXXXXXXXXX	2122-4 : PAY0130234	UG74	157000	C09	10/31/2021	XXXXXXXXXX	10/29/2021	A00000052558	CL070-157117-A0001-101--	4,209.11
XXXXXXXXXX	XXXXXXXXXX	2122-5 : PAY0131321	UG74	157000	C09	11/15/2021	XXXXXXXXXX	11/15/2021	A00000052558	CL070-157117-A0001-101--	4,209.11
XXXXXXXXXX	XXXXXXXXXX	2122-5 : PAY0131839	UG74	157000	C09	11/30/2021	XXXXXXXXXX	11/30/2021	A00000052558	CL070-157117-A0001-101--	4,209.11
XXXXXXXXXX	XXXXXXXXXX	2122-6 : PAY0132730	UG74	157000	C09	12/15/2021	XXXXXXXXXX	12/15/2021	A00000052558	CL070-157117-A0001-101--	4,209.11
XXXXXXXXXX	XXXXXXXXXX	2122-6 : PAY0133257	UG74	157000	C09	12/31/2021	XXXXXXXXXX	12/23/2021	A00000052558	CL070-157117-A0001-101--	4,209.11
XXXXXXXXXX											37,059.81
CL070-157117-A0001-101--											37,059.81
TOTAL											44,720.91



# Effort Report

Time and Effort Reporting : Time and Effort Report

Form ID **10000000**

## Employee Information

Employee Name **Spinning, James**

Empl ID **10000000**

Primary Department **157000 FUND FOR INFORMATIONAL SERVICES**

Reporting Period **July - December 2021**

Report Period Begin Date **07/01/2021**

Report Period End Date **12/31/2021**

Hide Chartfields

## Sponsored Accounts

1 row

Certified? ▾	Earnings ▾	Percent of Pay ▾	Details	Project/Grant ▾	Department ▾	Cost Share ▾	Op Unit/Dept/Fund/Acct/Class ▾
1 Yes	7250.01	15.06	<a href="#">Details</a>	10007140 Teaching with Primary Sources	157000		CL070 157000 F1000 51300 301

Subtotal 7250.01

Percent Subtotal 15.06


## University Accounts

2 rows

Certified? ▾	Earnings ▾	Percent of Pay ▾	Details	Project/Grant ▾	Department ▾	Cost Share ▾	Op Unit/Dept/Fund/Acct/Class ▾
1 Yes	3000.00	6.23	<a href="#">Details</a>		157000		CL070 157000 E8036 51300 301
2 Yes	37881.99	78.70	<a href="#">Details</a>		157117		CL070 157117 A0001 51300 101



# HCM Distribution

 UNIVERSITY OF SOUTH CAROLINA

HUB ▾ HCM DISTRIBUTION ▾ HCM DISTRIBUTION SEARCH Sign out

<b>USCID</b> <input type="text"/>	<b>Supervisor USCID</b> <input type="text"/>	<b>Pay Group</b> <input type="text"/>	<b>Combo</b> <input type="text"/>	<b>Project BU</b> <input type="text"/>	<b>From Pay Period</b> 07/15/2021 ▾	<b>Num of Records</b> <input type="text" value="10000"/>
<b>Name</b> <input type="text"/>	<b>Empl.Rcd</b> <input type="text"/>	<b>Pay End Date (m/d/y)</b> <input type="text"/> to <input type="text"/>	<b>Operating Unit</b> <input type="text"/>	<b>Project</b> <input type="text"/>	<b>To Pay Period</b> 02/28/2022 ▾	<b>Order By</b> Charfield,Name ▾
<b>Job</b> <input type="text"/>	<b>Empl.Class</b> <input type="text"/>	<b>Earn End Date (m/d/y)</b> 07/01 to 12/31	<b>Department</b> <input type="text"/>	<b>CFDA</b> <input type="text"/>	<b>Fiscal Month</b> ALL ▾	<input checked="" type="checkbox"/> <b>Total</b>
<b>HCM Dept.</b> <input type="text"/>	<b>Full/Part</b> All ▾	<b>Dist.Status</b> ALL ▾	<b>Fund</b> <input type="text"/>	<b>Contract</b> <input type="text"/>	<b>Fiscal Year</b> ALL ▾	<input checked="" type="checkbox"/> <b>Sub-Total</b>
<b>Journal.</b> <input type="text"/>	<b>Reg/Temp</b> All ▾	<b>Dist.Type</b> ALL ▾	<b>Class</b> <input type="text"/>	<b>Sponsor</b> <input type="text"/>	<b>Pay Run ID</b> <input type="text"/>	<input checked="" type="checkbox"/> <b>Detail</b>
<b>Check</b> <input type="text"/>	<b>Std.Hours</b> <input type="text"/>	<b>Dist.Class</b> ALL ▾	<b>Account</b> <input type="text"/>	<b>Costshare</b> <input type="text"/>		<input checked="" type="checkbox"/> <b>Sum.Adjustments</b>
<b>Check Date (m/d/y)</b> <input type="text"/> to <input type="text"/>	<b>HCM BU [Campus]</b> All ▾	<b>Dist.Code</b> <input type="text"/>				<b>Output</b> Fringe-Summary[Hor ▾



# HCM Distribution

NAME	USCID	FISCAL PERIOD : JOURNAL	JOB	HCM DEPT	GROUP	PAY PERIOD	CHECK	CHK DATE	COMBO	CHARTFIELD	LBR \$
		2122-7 : PAY0134027	UG70	157000	C09	01/15/2022	8000865319	01/14/2022	A00000008639	CL070-157000-E8036-301--	3,000.00
CL070-157000-E8036-301--											
		2122-1 : PAY0123964	VSUM	157000	SRC	07/15/2021	8000717263	07/15/2021	A00000008642	CL070-157000-F1000-301-10007140-	2,416.67
		2122-1 : PAY0125017	VSUM	157000	SRC	07/31/2021	8000727154	07/30/2021	A00000008642	CL070-157000-F1000-301-10007140-	2,416.67
		2122-2 : PAY0125851	VSUM	157000	SRC	08/15/2021	8000736430	08/13/2021	A00000008642	CL070-157000-F1000-301-10007140-	2,416.67
CL070-157000-F1000-301-10007140-											
		2122-2 : PAY0128785	UG74	157000	C09	08/31/2021	8000738261	08/31/2021	A00000052558	CL070-157117-A0001-101--	4,209.11
NAME	USCID	JOB	HCM DEPT	GROUP	PAY PERIOD	COMBO	CHARTFIELD				
ACCOUNT	EARN END	DIST. TYPE: CODE	CHECK : CHK DATE	FISCAL PERIOD : JOURNAL	AMOUNT						
		UG70	157000	C09	01/15/2022	A00000008639	CL070-157000-E8036-301--				
51300		12/21/2021	ERN:RTM-Retro Pay Manual					2122-7:PAY0134027	3000		
LABOR: 3,000.00 (41.61%)											
FRINGE: (0.00%)											
		2122-6 : PAY0132730	UG74	157000	C09	12/15/2021	8000835426	12/15/2021	A00000052558	CL070-157117-A0001-101--	4,209.11
		2122-6 : PAY0133257	UG74	157000	C09	12/31/2021	8000850232	12/23/2021	A00000052558	CL070-157117-A0001-101--	4,209.11
CL070-157117-A0001-101--											
TOTAL											
48,132.00											



# Effort Report

Time and Effort Reporting : Time and Effort Report Form ID **1000000000**

---

**Employee Information**

Employee Name **Spinning, James** Empl ID **1000000000**

Primary Department **157000 - SCHOOL OF INTERNATIONAL STUDIES**

Reporting Period **July - December 2021**

Report Period Begin Date **07/01/2021** Report Period End Date **12/31/2021**

---

**Sponsored Accounts**

Certified? ▾	Earnings ▾	Percent of Pay ▾	Details	Project/Grant ▾	Department ▾	Cost Share ▾	Op Unit/Dept/Fund/Acct/Class ▾
1	Yes	7250.01	15.06	<input type="button" value="Details"/>	10007140 Teaching with Primary Sources	157000	CL070 157000 F1000 51300 301

Subtotal 7250.01  
Percent Subtotal 15.06

---

**University Accounts**

Certified? ▾	Earnings ▾	Percent of Pay ▾	Details	Project/Grant ▾	Department ▾	Cost Share ▾	Op Unit/Dept/Fund/Acct/Class ▾
1	Yes	3000.00	6.23	<input type="button" value="Details"/>	157000		CL070 157000 E8036 51300 301
2	Yes	37881.99	78.70	<input type="button" value="Details"/>	157117		CL070 157117 A0001 51300 101



# Other Tips

- Select the “Details” tab on the Effort Report
  - Are other check dates being pulled in (Current vs. Lag)?
  - Are there out of the ordinary Earnings Codes being used?

Time and Effort Reporting : Time and Effort Report

**Line Detail**

Department PROVOST & VC FOR AA ADMINISTRA  
Project 10010305 Student Support Servi  
Chartstring UP000 984101 F1000 51200 501

3 rows

	Earnings End Date	Check Date	Empl Rcd	Earn Code	Earnings
1	07/08/2021	07/30/2021	0	HOL	138.46
2	07/08/2021	07/30/2021	0	REG	679.72
3	07/08/2021	08/05/2021	0	RTM	2406.14

Hide Chartfields

Sponsored Accounts

Certified?	Earnings	Percent of Pay	Details	Chartstring
1 Yes	3224.32	100.00	Details	10010305 Student Support Services 984101 UP000 984101 F1000 51200 501

Subtotal 3224.32  
Percent Subtotal 100.00

# Other Tips

NAME	USCID	FISCAL PERIOD : JOURNAL	JOB	HCM DEPT	GROUP	PAY PERIOD	CHECK	CHK DATE	COMBO	CHARTFIELD	LBR \$	LBR %
		2122-1 : PAY0123964	CB70	988990	P12	07/15/2021		07/15/2021	A00000063388	UP000-984101-F1000-501-10010305-	1,500.00	100.00%
		2122-1 : PAY0125017	CB70	988990	P12	07/31/2021		07/30/2021	A00000063388	UP000-984101-F1000-501-10010305-	2,003.88	100.00%
		2122-2 : PAY0125851	CB70	988990	P12	08/15/2021		08/05/2021	A00000063388	UP000-984101-F1000-501-10010305-	2,408.14	100.00%
											5,909.82	
UP000-984101-F1000-501-10010305-											5,909.82	

- **Use HCM Distribution** to compare the checks listed on the “Details” screen on the Effort Report to the ones shown in HCM
  - If there are discrepancies, click on the labor amounts to determine if there are Earnings Codes that need to be excluded.
  - Select the first and last paycheck listed to determine if Annual Leave Payouts (ALP) or prior earnings are listed



# Other Tips

- 7/15/2021 Paycheck Includes Earnings from prior reporting period and is excluded (Paid on a Lag):

NAME	USCID	JOB	HCM DEPT	GROUP	PAY PERIOD	COMBO	CHARTFIELD	
		ACCOUNT	EARN END		DIST. TYPE: CODE	CHECK : CHK DATE	FISCAL PERIOD : JOURNAL	AMOUNT
		CB70	98890	P12	07/15/2021	A0000083388	UP000-984101-F1000-501-10010305-	
1		51200	08/30/2021	ERN:REG-Regular Pay		07/15/2021	2122-1:PAY0123984	1500
		LABOR: 1,500.00 (100.00%)		FRINGE: (0.00%)				1,500.00

- 7/30/2021 Paycheck includes Annual Leave Payout:

NAME	USCID	JOB	HCM DEPT	GROUP	PAY PERIOD	COMBO	CHARTFIELD	
		ACCOUNT	EARN END		DIST. TYPE: CODE	CHECK : CHK DATE	FISCAL PERIOD : JOURNAL	AMOUNT
		CB70	98890	P12	07/31/2021	A0000083388	UP000-984101-F1000-501-10010305-	
1		51200	07/08/2021	ERN:AL3-Annual Leave Payout Class III		07/30/2021	2122-1:PAY0125017	1185.5
2		51200	07/30/2021	ERN:REG-Regular Pay		07/30/2021	2122-1:PAY0125017	180.00
3		51200	07/08/2021	ERN:REG-Regular Pay		07/30/2021	2122-1:PAY0125017	679.72
		LABOR: 2,003.68 (100.00%)		FRINGE: (0.00%)				2,003.68
LABOR:		2,003.68		FRINGE:		(0.00%)		TOTAL: 2,003.68



# Other Tips

NAME	USCID	FISCAL PERIOD :	JOURNAL	JOB	HCM DEPT	GROUP	PAY PERIOD	CHECK	CHK DATE	COMBO	CHARTFIELD	LBR \$
Allyson Jacobs	988990	2122-1 : PAY0125017		CB70	988990	P12	07/31/2021		07/30/2021	A00000063388	UP000-984101-F1000-501-10010305-	2,003.68
Allyson Jacobs	988990	2122-2 : PAY0125851		CB70	988990	P12	08/15/2021		08/05/2021	A00000063388	UP000-984101-F1000-501-10010305-	2,406.14
												4,409.82
UP000-984101-F1000-501-10010305-												4,409.82

- \$4,409.82 less: ALP of \$1,185.50 = \$3,224.32

Time and Effort Reporting : Time and Effort Report Form ID

**Employee Information**

Employee Name: Allyson Jacobs      Empl ID: 988990

Primary Department: 10010305 STUDENT SUPPORT SERVICES

Reporting Period: July - December 2021

Report Period Begin Date: 07/01/2021      Report Period End Date: 12/31/2021

**Sponsored Accounts**

Certified? ▾	Earnings ▾	Percent of Pay ▾	Details	Project/Grant ▾	Department ▾	Cost Share ▾	Op Unit/Dept/Fund/Acct/Class ▾
1    Yes	3224.32	100.00	<input type="button" value="Details"/>	10010305 Student Support Services	984101		UP000 984101 F1000 51200 501

Subtotal 3224.32

Percent Subtotal 100.00



# Other Tips

NAME	USCID	FISCAL PERIOD : JOURNAL	JOB	HCM DEPT	GROUP	PAY PERIOD	CHECK	CHK DATE	COMBO	CHARTFIELD	LBR \$	LBR %	TA
		2122-1 : PAY0125017	AM18	100100	I12	07/31/2021		07/30/2021	A00000060986	CL061-100100-F1000-201-10010076-	2,708.33	100.00%	
		2122-2 : PAY0125851	AM18	100100	I12	08/15/2021		08/13/2021	A00000060986	CL061-100100-F1000-201-10010076-	2,708.33	100.00%	
		2122-2 : PAY0126765	AM18	100100	I12	08/31/2021		08/31/2021	A00000060986	CL061-100100-F1000-201-10010076-	3,708.33	100.00%	
		2122-3 : PAY0127576	AM18	100100	I12	09/15/2021		09/15/2021	A00000060986	CL061-100100-F1000-201-10010076-	2,708.33	100.00%	
		2122-3 : PAY0128464	AM18	100100	I12	09/30/2021		09/30/2021	A00000060986	CL061-100100-F1000-201-10010076-	2,708.33	100.00%	
		2122-4 : PAY0129481	AM18	100100	I12	10/15/2021		10/15/2021	A00000060986	CL061-100100-F1000-201-10010076-	2,708.33	100.00%	
		2122-4 : PAY0130234	AM18	100100	I12	10/31/2021		10/29/2021	A00000060986	CL061-100100-F1000-201-10010076-	2,708.33	100.00%	

NAME	USCID	JOB	HCM DEPT	GROUP	PAY PERIOD	COMBO	CHARTFIELD	AMOUNT
		ACCOUNT	EARN END	DIST. TYPE: CODE		CHECK : CHK DATE	FISCAL PERIOD : JOURNAL	
			AM18	100100	I12	08/31/2021	A00000060986	CL061-100100-F1000-201-10010076-
1		51200	08/14/2021	ERN.BON-Bonus		08/31/2021	2122-2.PAY0126765	1000
2		51200	08/14/2021	ERN.REG-Regular Pay		08/31/2021	2122-2.PAY0126765	2473.95
3		51200	08/07/2021	ERN.SCK-Sick Leave Taken		08/31/2021	2122-2.PAY0126765	234.38
		LABOR: 3,708.33 (100.00%)		FRINGE: (0.00%)				3,708.33
LABOR:		3,708.33		FRINGE:		(0.00%)		TOTAL: 3,708.33

- Are there any pay periods that are higher or lower than others?
- If yes, could be an indicator that there may be an earnings code that is excluded from Effort Reporting.



# Reminders

- July – December 2021 Effort Reports were released **Monday, February 7th**.
- Reports are due **Monday, March 7<sup>th</sup>**.
- **If you have a report in Error** (where the pending approver listed is Tiffany Boyd, Lindsay Anastasio, or Sydney Williams), email the [GFMeCert@mailbox.sc.edu](mailto:GFMeCert@mailbox.sc.edu) mailbox
  - Form ID # and Employee Name
  - Full name of Supervisor that should be inserted
  - Don't forget to submit a JOBCHG form to update PeopleSoft HCM for future reporting periods!



# Where to Find Resources

Uof SC South Carolina

GATEWAYS FOR: STUDENTS FACULTY & STAFF ALUMNI PARENTS CALENDAR MAP DIRECTORY GIVE

SEARCH SC.EDU

## Office of the Controller

- Office of the Controller
- General Accounting
- Grants and Funds Management**
- Grants and Funds Staff Directory
- Supplier and Tax Management
- Cash and Treasury Management
- Financial Reports and Transparency
- Chart of Accounts
- Policies and Procedures
- Contact Us

### Grants and Funds Management

Grants and Funds Management is responsible for the accounting and management of all restricted grants and contracts within the university system.

### Our Services

The Grants and Funds Management team:

- 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
- prepares and negotiates indirect cost rate agreement

### Contact Grants and Funds Management

For questions about any Grants and Funds Management services, please contact us directly:

**Marie Baka**  
Assistant Director  
[BAKA@mailbox.sc.edu](mailto:BAKA@mailbox.sc.edu)

**Alex Pitts**  
Senior Manager – Accounts Receivable and Billing  
[PITTSMA@mailbox.sc.edu](mailto:PITTSMA@mailbox.sc.edu)

Expand all

- GFM Staff by Departmental Assignments (+)
- Sponsored Programs Close Out (+)
- F&A Allocations (+)
- Information Links for Grants and Contracts (+)

### Webinars and Training

Expand all

- 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 (+)**
- New Cost Transfer Policy and Retro Funding Change (+)



# Questions?



## Contact:

Grants and Funds Management Office

[gfmecert@mailbox.sc.edu](mailto:gfmecert@mailbox.sc.edu)



# Next Webinar:

Using the Grants Dashboard

**Wednesday, March 2nd**

1:00 – 2:00 pm





UNIVERSITY OF  
SOUTH CAROLINA