

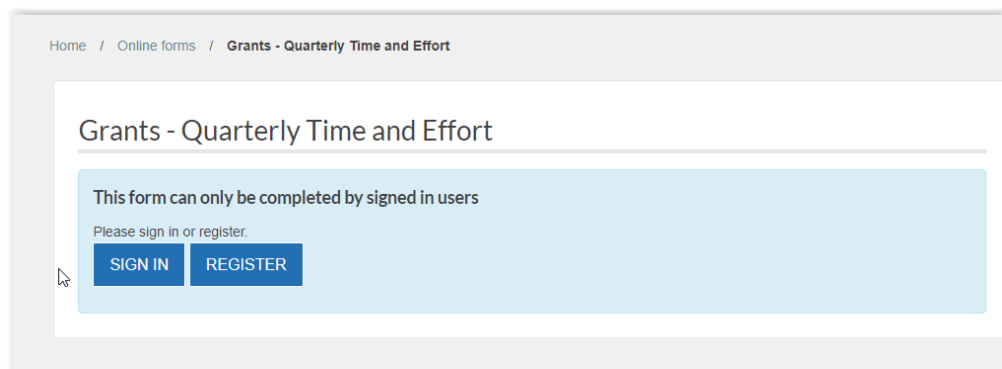
Instructions:

How to Fill Out Quarterly Time & Effort Forms

Federal regulations require that salaries charged to grants and other externally funded projects must be based on records that accurately reflect the work performed. This quarterly time and effort form allows employees to attest that what they were paid during the previous quarter reasonably reflects how much effort they worked on grant-funded activities.

[Accessing the form](#)

You can find the form [here](#). The link will take you to the sign in page. Sign in using the same credentials you use to access the portal.



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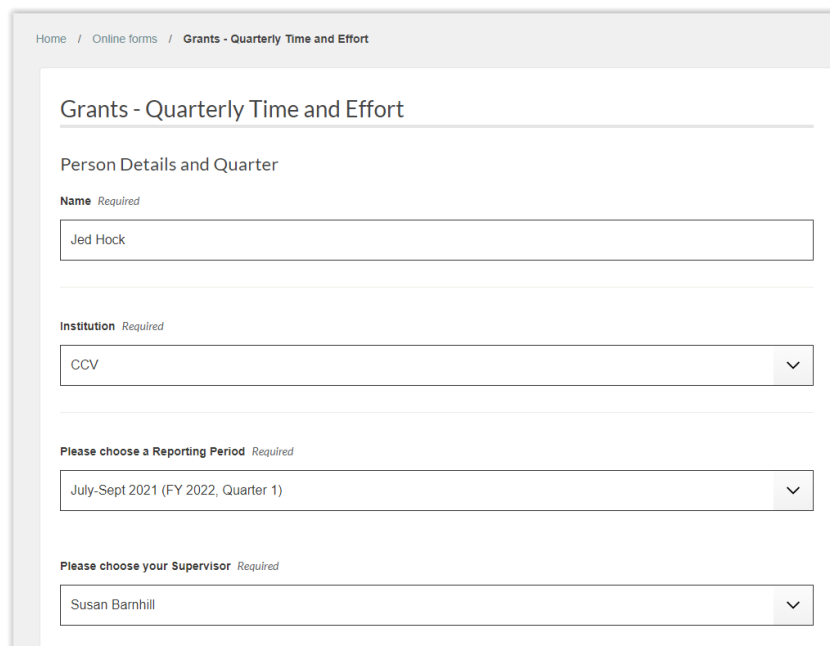
Grants - Quarterly Time and Effort

This form can only be completed by signed in users
Please sign in or register.

[SIGN IN](#) [REGISTER](#)

[Form Page 1 – Employee Details](#)

The system should autofill your full name. Choose your institution from the drop-down menu. The reporting period will autofill. Select your supervisor and click “Next.”



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Grants - Quarterly Time and Effort

Person Details and Quarter

Name *Required*

Jed Hock

Institution *Required*

CCV

Please choose a Reporting Period *Required*

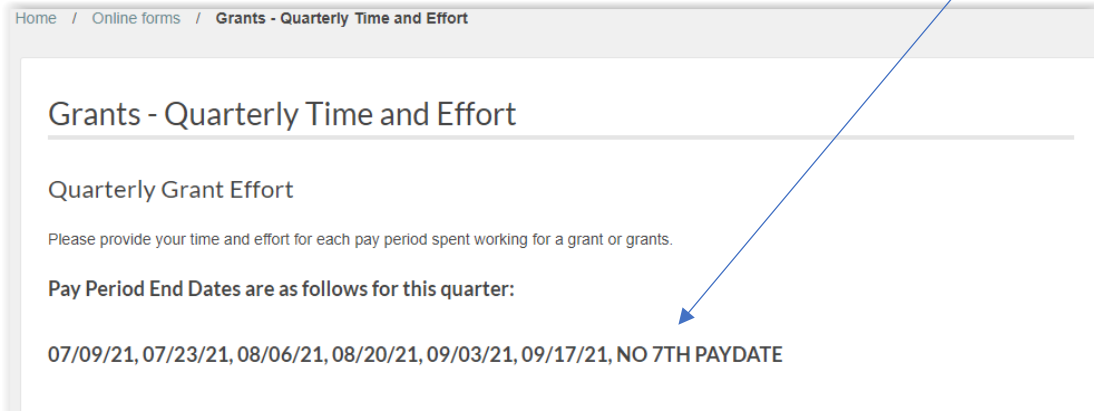
July-Sept 2021 (FY 2022, Quarter 1)

Please choose your Supervisor *Required*

Susan Barnhill

[Form Page 2 – Quarterly Grant Effort](#)

PLEASE NOTE – Due to our two-week payment cycle, some quarters will have six pay period dates and some will have seven. If there is not a seventh pay date for that quarter, this will be specified in the list of pay period dates. Do not put in any effort for that pay period; just leave it blank.



You will next see a question about whether you had effort charged to a grant during the past quarter. If you did not have an allocation charged to a grant and are filling out the form to document match only, select “NO” to skip to the next section.

Was any of your effort this quarter charged to a grant? *Required*

If you had grant effort, enter the **entity code and activity code** of your first (or only) grant. You should have gotten this information from your supervisor or grant staff.

Grant 1

Entity Code *Required*

Activity Code *Required*

In the “Grant Effort” table, enter the percentage for each pay period. If there is no 7th Pay Date as explained above, leave Pay Period 7 blank.

NOTE: If you do not think the listed allocations align in comparison to your actual grant effort, put in what you think seems more reasonably accurate. This does not need to be exact, as minor fluctuations in effort are expected day to day. But if your overall effort was significantly different than how you were paid by the grant, then we need to make sure the grant is charged accordingly. **If you enter a different effort, make sure you document this in the “Verification of Effort” question at the end of the form. (See page 5.)**

Grant Effort <i>Required</i>	
	PERCENTAGE
Pay Period 1	<input type="text" value="80"/>
Pay Period 2	<input type="text" value="80"/>
Pay Period 3	<input type="text" value="80"/>
Pay Period 4	<input type="text" value="80"/>
Pay Period 5	<input type="text" value="80"/>
Pay Period 6	<input type="text" value="80"/>
Pay Period 7	<input type="text"/>

Once you have completed the table for Grant 1, you will be asked if you have another grant to bill to. If the answer is yes, choose “Yes” and click “NEXT.” The page will expand, and you will see an area to input information for Grant 2. You can do this for up to six grants and the page will continue to drop down to add more tables for each grant. Click “NEXT” when you have entered all grants.

[Form Page 3 – Quarterly Institutional Effort](#)

You’ll next be asked if you had effort charged to an institutional (non-grant) account.

Did you spend time on duties that were not charged to a grant? *Required*

If you have no institutional effort, choose “No” for this question and click “NEXT.”

If you did have institutional effort, select “Yes.” You’ll then enter in the institutional **entity code, activity code, and percentages** as explained above in the grant section.

You can enter an additional institutional entity/activity code if you have multiple institutional allocations.

Click “NEXT” when you have entered all institutional effort.

Form Page 4 – Quarterly Matching Effort

You will next be asked if any of your effort in the previous quarter was used as a match for a grant. If you have no match, choose “No” for this question and click “NEXT.”

Is any of your effort this quarter used as a match for a grant? *Required*

If you did have match effort, select “Yes.” You’ll then enter in the institutional **entity code, activity code, and percentages** as explained above in the grant section.

You can enter an additional entity/activity code if you have multiple match allocations.

Click “NEXT” when you have entered all match effort.

Form Page 5 – Time/Effort Review

The last page of the form provides a summary of your effort.

Grant Effort(s)

Grant Effort							
ENTITY- ACTIVITY CODE	07/09/21	07/23/21	08/06/21	08/20/21	09/03/21	09/17/21	NO 7TH PAYDATE
012- 12345	20	20	20	20	20	20	
-							
-							
-							

Institutional Effort(s)

Institutional Effort							
ENTITY- ACTIVITY CODE	07/09/21	07/23/21	08/06/21	08/20/21	09/03/21	09/17/21	NO 7TH PAYDATE
011- 67890	20	20	20	20	20	20	
-							

Matching Effort(s)

Matching Effort							
ENTITY- ACTIVITY CODE	07/09/21	07/23/21	08/06/21	08/20/21	09/03/21	09/17/21	NO 7TH PAYDATE
011- 23456	20	20	20	20	100	60	
-							

Below the charts, you will see a summary for each pay period with calculations done to show if you have accounted for 100% of your effort.

Pay Period 4 - Over/Under 100 Percent Effort = Under Effort = 40
Pay Period 5 - Over/Under 100 Percent Effort = Over Effort = -40
Pay Period 6 - Over/Under 100 Percent Effort = No Missing Effort = 0
Pay Period 7 - Over/Under 100 Percent Effort = No 7th Pay Date = No 7th Pay Date

You can also see here as a reminder that there's "No 7th Pay Date" this quarter and you should have no values in Pay Period 7 which you can easily review on the chart.

Use the "PREVIOUS" and "NEXT" buttons to move between the pages to resolve your mistakes if needed.

[PREVIOUS](#)[NEXT](#)

Once the issues are resolved you can use the "NEXT" button to proceed back to the "Time and Effort Review" page. It will recalculate the totals.

Verification of Effort

Your salary has already been charged according to your grant allocations, which were provided to you to use on this form. If your effort aligns with your allocation and you made no changes on this form, please choose the first option.

Verification of Effort (Please choose) *Required*

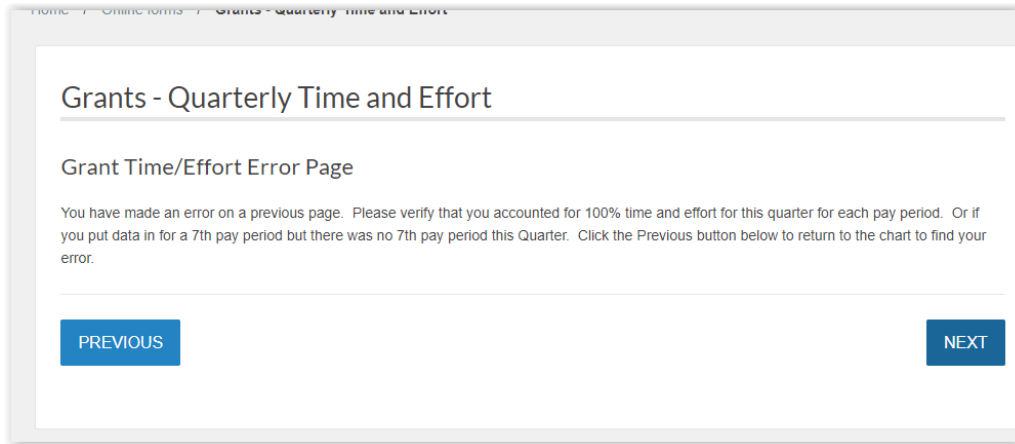
- The percentages that I entered on this form align with my allocation in the accounting records.
- I had a significantly different percentage of effort than what was allocated. The percentages entered on this form are more accurate representations of my effort. (Note: Small fluctuations in effort during each pay period are normal and don't need to be corrected.)

HOWEVER: If you entered a different allocation on this form than what is in our accounting records, it's important that you choose the second option. This way, the form will then route to grant accounting so that any amounts charged to grants are corrected.

After making your selection click “NEXT” to move to the last page, which is a summary of your responses to the form.

[ERROR PAGE \(CONDITIONAL\)](#)

If, after clicking “NEXT” on the “Time and Effort Review” page, you are brought to the “Grant Time/Effort Error Page” it means you have made a mistake somewhere:



Please click “PREVIOUS” and return to the “Time and Effort Review” page to verify where you have made mistakes.

[REVIEW SUPPLIED DETAILS](#)

This is a standard page on all forms. You can ignore this page as the Time and Effort Review Page is really taking its place.

Please scroll to the bottom and click “SUBMIT FORM.” This will then send your form to be approved by your supervisor/grant approver. You will receive a copy of your submitted form in your inbox with all of the details from the “Review Supplied Details” page as well as an attachment of a copy of the form that was submitted to Perceptive Content.