

## **TIME AND EFFORT DOCUMENTATION WITH WORKLOAD FORMS AND ACTIVITY FORMS**

### **Who has to document their time and effort distribution?**

All faculty, staff, students and temporary employees who are compensated in whole or in part by federal funds, funds used to match a federal grant, or whose efforts are used to satisfy a required or voluntary match for a federal grant must engage in time and effort reporting as appropriate to their position. Time and effort reporting is a federal requirement.

### **How is time and effort documented?**

Documentation is a two-step process.

- 1) A Workload Report is submitted on a Time and Effort Form at the beginning of a reporting period; this form lists the **anticipated** distribution of time and effort.
- 2) An Activity Report is submitted on a Time and Effort Form at the end of a reporting period; this form lists the **actual** distribution of time and effort. Time and effort distributions described on an employee's Activity Report must be in agreement with the distribution in the PeopleAdmin system at the time of submission.

### **How often do you need to submit documentation?**

#### Faculty and Graduate Assistants

Workload Reports are submitted each semester, by the first day of each semester, Spring, Summer, and Fall.

Activity Reports are submitted each semester, by the last day of each semester, Spring, Summer, and Fall.

#### Non-Faculty Paid Monthly, Employees Paid Bi-weekly, County Extension Employees

Workload Reports for the periods of April 1- September 30 and October 1- March 31, submitted by the first day of the period.

Activity Reports for the periods of April 1- September 30 and October 1- March 31, submitted by the last day of the period.

#### Temporary Employees

Workload Forms and Activity Forms are not submitted. Employees should follow the standard university and college time sheet documentation and approval process.

### **What if your time and effort distribution changes in the middle of a reporting period?**

Any changes in time and effort distribution that occur during a reporting period must be documented immediately and approved by the supervisor and appropriate Associate Dean. Documentation and approval is accomplished via the submission of a Time and Effort Form with the Modification of Effort box marked and the effective date of the modification noted. The effective date is the date on which the new time and effort distribution takes effect in People Admin. The employee also initiates a PARF in PeopleAdmin to reflect the change in distribution. The distribution of time and effort described on an employee's Activity Form is required to be in agreement with the distribution in the PeopleAdmin system.

### **Where are forms submitted?**

All Workload Reports, Activity Reports, and Modification of Effort Reports are submitted to the employee's immediate supervisor.

## How to Fill the Forms

### Faculty / Graduate Assistant Forms

A Workload Report lists the anticipated distribution of time and effort for the reporting period.

An Activity Report lists the actual distribution of time and effort for the reporting period. The distribution of time and effort on the Activity Form must match the distribution of time and effort in the PeopleAdmin system at the time of submission.

A Modification of Workload Report lists a new distribution of time and effort that has occurred during a reporting period. It is the employee's responsibility to document any changes in time and effort distribution that occur during a reporting period and initiate a PARF in PeopleAdmin to reflect the changes.

### Entering Information

Employees enter their name, department, and reporting time period at the top of the form. The employee also designates the type of report, *i.e.* Workload, Activity, or Modification.

### Traditional Teaching

For employees who have a traditional class assignment (in person or on-line), enter the teaching account number, the name of the class, and the percent effort in the upper portion of the table. Percent effort for teaching per course per semester is presented in the table below.

Percent Effort Per Course Per Semester		
	Undergraduate	Graduate
3 credit course	20.00%	25.00%
4 credit course	26.67%	33.34%
5 credit course	33.34%	41.67%

### External Grants

For all external (non-capacity) grants that support a portion of the employee's salary, list the grant account number, the account name, a statement of responsibilities and activities for the reporting period, and the percent of effort being supported by the grant. Accuracy in reporting percent effort allocation is critical

For the statement of responsibilities, enough detail should be presented that a reasonable person can understand the breadth of activities and also be able to differentiate the activities and responsibilities described for the present grant from the activities and responsibilities of other grants or those activities listed for capacity funds. It is critical that the activities described for a grant are directly tied to the objectives of that grant.

### Capacity Funds

Mark the checkbox(s) associated with the source of funding for the employee's capacity funded project(s).

Enter the percent effort for each capacity fund type.

Enter the name of the approved Capacity Fund Project(s).

Provide a description of the responsibilities and activities directly associated with the project (s).

Enough detail should be presented so that a reasonable person can understand the breadth of activities and also differentiate the activities and responsibilities described for the capacity activities from the activities related to other funding.

It is critical that the activities described are directly tied to the objectives of the approved project(s). Only project-related items are to be listed. Service is not part of capacity projects. The total effort will be automatically calculated.

### Total Effort

Total effort cannot exceed 100%. For employees who are only partially paid from College of Agriculture funds, the total effort may be less than 100%.

### Signatures

Attach a digital signature and submit the form to your supervisor. Employees with more than one supervisor should ensure both supervisors sign the form. The supervisor will review for accuracy and forward to the appropriate Associate Dean. Extension employee reports are sent to the Associate Dean for Extension; research and other employee reports are sent to the Associate Dean for Research.

### Non-Faculty Forms

The Workload Report lists the anticipated distribution of time and effort for the reporting period.

The Activity Report lists the actual distribution of time and effort for the reporting period. The distribution of time and effort on the Activity Form must match the distribution of time and effort in the PeopleAdmin system at the time of submission.

A Modification of Workload Report lists a new distribution of time and effort that has occurred during a reporting period. It is the employee's responsibility to document any changes in time and effort distribution that occur during a reporting period and initiate a PARF in PeopleAdmin to reflect the changes.

### Entering Information

Employees enter their name, department, and reporting time period at the top of the form. The employee also designates the type of report, *i.e.* Workload, Activity, or Modification.

### Capacity Funds

Mark the checkbox(s) associated with the source of funding for the employee's capacity funded project(s).

Enter the percent effort for each capacity fund type.

Enter the name of the approved Capacity Fund Project(s).

Provide a description of the responsibilities and activities directly associated with the project (s).

Enough detail should be presented so that a reasonable person can understand the breadth of activities and also differentiate the activities and responsibilities described for the capacity activities from the activities related to other funding.

It is critical that the activities described are directly tied to the objectives of the approved project(s). Only project-related items are to be listed. Service is not part of capacity projects.

### External Grants

If any salary is paid from external grants (non-capacity funds), list the grant account number, the account name, a statement of responsibilities and activities for the reporting period, and the percent of effort being supported by the grant. Accuracy in reporting percent effort allocation is critical. For the statement of responsibilities, enough detail should be presented that a reasonable person can understand the breadth of activities and also be able to differentiate the activities and responsibilities described for the present grant from the activities and responsibilities of other grants or those

activities listed for capacity funds. It is critical that the activities described for a grant are directly tied to the objectives of that grant.

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