Salary Certification (Time & Effort Reporting) procedure –

Log in to https://helene.msu.montana.edu/te/

Entering monthly effort reporting –

Select the appropriate period you want to enter effort (time & effort reporting runs from the **first** to **final pay date** of the fiscal year) for that "Period"

(Fig 1)

Options - click on Enter Data

(Fig 2)

For each person in your org who has sponsored funding (Fig 2) you will need to complete the entry. Please note – this program is tied to *initial* payroll in banner – that's where the feed comes from every month, which means that T&E is fluid – if you process a payroll correction for July in September, you'll need to go back in and edit July T&E or it will have the original entry.

If you notice a person in your sponsored employees list (Fig 2) who is either no longer in your org or for whatever reason should not be, please reach out to Monique Hill @ monique.hill1@montana.edu and let her know the employee name(s); Monique will work directly with HR to get the home org updated and will be able to update your org to move the employee(s) immediately so that they will be appropriately reported

(Fig 3)

- When entering effort the total must equal 100 or the system will give you an error message that will not allow you to save and advance to the next employee
- Start with the sponsored indices (bottom end of page)

- When faced with rounding issues it's a process of elimination:

Index	Sponsored Total		2,432.25	33.37	34

Index	Description	Pay Amt	Pay Pct	Effort Pct
4W8826	LAMP: Other Costs	1,822.25	25.00	25
4W8792	LAMP: Expanding Screening Capacity	610.00	8.37	9

- _____ (Fig 4)

   o If there are university funds these can always round **down,** allowing you to round **towards** the sponsored funds – university funds are allotted annually and are not tracked for effort reporting purposes, this is true with any 41xxxx, 0xxxxx, 91xxxx, or 91Mxxx index.
   o We never want to represent that an employee received funds for work not performed (over-reporting on untracked funding) and under-reporting (rounding adds up across 12 months/26 pays) on 'sponsored' or tracked funding.
   o If all effort is on sponsored funds, then you want to always round towards federal dollars in the following order -
     ▪ Federal sponsor
     ▪ Fed Pass through
     ▪ Direct from State of MT
     ▪ Pass through from State of MT
     ▪ Private sponsor
   o In the event that you've exercised all of these options to the best of your abilities, follow typical round rules 0.5 rounds up.

- Clicking "Save" will advance you to the next person in your list.

- Once you've entered all employees you will see **End of Sponsored Employee List** (Fig 5) confirming that you have completed that pay-period reporting.

Reporting cost share –

As a typical rule, no federal sponsor will allow cost-share to be matched from other sponsored funds that are federal; however, State and Private funding are acceptable. Therefore, cost-share is most commonly entered from university funding (41xxxx, 91xxxx, 0xxxxxx, or 91Mxxx). In the event you need to enter cost-share for a grant not auto-populated in the sponsored funding list you would enter the index number in the blank field and click add -

Index	Sponsored Total		2,432.25	33.37	34

Index	Description	Pay Amt	Pay Pct	Effort Pct	
4W8146	Paraprofessional Landscape Analysis	0.00	0.00		Delete
4W8826	LAMP: Other Costs	1,822.25	25.00	25	
4W8792	LAMP: Expanding Screening Capacity	610.00	8.37	9	

(Fig 6)

At this point you can enter the amount of cost-share that should be represented to that grant – again, your total must equal 100% and the rounding rules still apply.

Notes for Period 2020 DEC

(Fig 7) Every month of reporting has a "notes" section – this information does not flow through to the certification, but it may be helpful to 'track' cost-share or any out of the ordinary notes or reminders (not required).

Account code verification

The Time & Effort System is set to track the following account codes –

Salaries

61123	Contract Faculty
61123N	Non Tenure Track Faculty
61124	Contract Professional
61125	Classified Employee
61126	Graduate Teaching Assistant
61126A	GTA Additional Payment
61127	Graduate Research Assistant
61127A	GRA Additional Payment
61128	Contract Administrator
61130	Contract Faculty-Summer

(Fig 8)

In the event that payroll or a one-pay posts to the incorrect account code (say student worker 61**225** is entered as 61**125** that will show up in the T&E records and unless a payroll correction is processed, effort will need to be reported on that entry. The only way to correct the record is to process a payroll correction which can be problematic if the entry isn't caught until certification.

Quick note – at any given time you can check on under/unreported effort by clicking on "Under Reported Effort YTD" as below – this is a great way to check on any payroll corrections and/or 'catch-up' on effort reporting.

(Use the Dropdown List or enter an Org code and press Find Code)

Organizations AES CARC (412901)

Period 23-APR-2022 - 20-MAY-2022

Options Enter Data · FY 2022 · Under Reported Effort

Report Dollars · FY 2022 · Effort Detail YTD

Report Percent

Queestions/Discussion?