

**MEDICAL UNIVERSITY OF SOUTH CAROLINA  
WEB-BASED ACTIVITY REPORTING SYSTEM  
DEPARTMENTAL COORDINATOR GUIDE**

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<p style="text-align: center;"><b>MEDICAL UNIVERSITY OF SOUTH CAROLINA WEB-BASED ACTIVITY REPORTING SYSTEM DEPARTMENTAL COORDINATOR GUIDE</b></p>
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## **I. WHY MUSC ACTIVITY REPORTING IS GOING TO THE WEB**

- To improve compliance by validating activity (effort) report certifications so that MUSC follows Federal regulations. Compliance with these regulations is essential so that MUSC can continue to receive grants and contracts as well as Medicare and Medicaid funds – these are major sources of funds for the University.
- To allow employees, college administrators, departmental business managers, and departmental effort coordinators improved access to activity reporting information.
- To streamline the very labor-intensive process of printing, distributing, reviewing, certifying, and keying over 6,000 effort reports produced each year.

## **II. TOOLS NEEDED TO USE THE WEB-BASED SYSTEM**

- An **MUSC Network Account (MNA) Userid and Password** – This computing account is used for many MUSC applications including Library databases, myMUSC, myGrants, myProvost, etc. The password is typically NOT the same as your workstation's network login password or your e-mail password.

If you do not have an MNA login, the MNA instructions and application form can be found on the web at: <http://www.musc.edu/ccit/mna/>

- A up-to-date **Web Browser** – minimum standards are:

Microsoft Internet Explorer 5.0 (preferred)  
OR  
Netscape 4.7

- Please note that the system response time will depend upon many factors including your workstation's memory and processor, other applications currently loaded, and network traffic. For best system response time, it is recommended that you close any unnecessary applications while you are using the web-based effort system.

## **III. WHEN AND HOW TO LOG IN TO THE WEB SYSTEM**

- You will receive a notification via e-mail from Grants and Contracts Accounting (GCA) when your department's effort reports for the most recent quarter are ready for your review. A link to the web site will be included in the e-mail message.
- After you receive e-mail notification from you the GCA Effort Coordinator, click on the link to go to the secure web site: <http://effort.musc.edu> or <http://appserve.musc.edu/effort>
- Enter your MNA Userid and Password to log in.

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- The following selections will be displayed on the system's [HOME](#) page. Navigation links at the top right of all subsequent pages include [HELP & FAQ](#), [HOME](#), and [Logout](#). (If you are Departmental Effort Coordinator and also submit your own effort report, you will also have a link to [Effort Reports](#) on this page; [click here to go to the Employee Guide](#) for further information.)

[Department Coordinator](#) will allow the Coordinator for a department to view the Activity Reports for their department only.

[Log Out](#) - Exit MUSC Activity Reporting

To view FAQ's regarding Activity Reporting, go to [FAQ's](#)

To view policies and procedures regarding Activity Reporting go to [Finance Administrative Policy/Procedure 4-5.02](#)

For specific questions regarding your Activity Report, send an e-mail to [trussell@musc.edu](mailto:trussell@musc.edu)

#### **IV. HOW TO PREVIEW AN EMPLOYEE'S QUARTERLY ACTIVITY REPORTS**

- Click on [Department Coordinator](#).
- You will next see the [Quarters to View Page](#). Select the most recent quarter and then select a Unit from the list on the [Select Unit to View Page](#). The web system's security table ties your MNA login to specific Home Units under your area of responsibility. **Please contact GCA directly if any Home Units should be changed to another coordinator.**
- The screen will display the [Modify, View, or Email Employee Page](#), which provides **Employee Names, Position Titles, Status** ("Submitted" or "Not Submitted", along with the Submission Date), **Due Date** (60 days after the quarter end date), and **Compose Email** link. Reports that have been previously submitted in past quarters via paper will display as "Submitted(P)".
- As Departmental Coordinator, you have the following options:
  - **Send an email** to all or selected employees listed.
  - **Modify** effort reports that have not yet been submitted by the employee.

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- **View** effort reports that have been submitted (you must contact GCA if resubmission is required).

- **IMPORTANT NOTE:** Please note that you may view the effort reports that have been certified previously, but you can only modify those reports that have not yet been submitted. The ability to modify reports prior to employee review and certification has been provided to allow the Departmental Effort Coordinator to correct payroll distribution percentages and add new projects to the reports, as discussed in detail below.

## V. HOW TO CORRECT APPROXIMATE PAYROLL DISTRIBUTION

- **To Navigate Around the Report:**

After you have clicked on **View / Modify** for a specific employee, the quarterly activity report will display on the [View & Modify Your Effort Report Page](#). The online report is formatted much like the paper report. In addition, there are helpful web links to assist the employee and you as departmental coordinator, for example:

- You can click on any column's [Category Heading](#) to link to definitions and examples for each effort category.
- You can click on each [UDAK Project Number](#) to view a detailed description of the project. For Sponsored (Grant/Contract) Projects, the full grant title, sponsor, principal investigator, and budget period and project period dates are provided on the project detail screen.
- For reference, the **Approximate Payroll Distribution** for the quarter (how the employee's salary was initially distributed in the payroll system) is shown in the far right column titled "**Aprx Payr Dist**". (The difference between this percentage and the Actual Effort Distribution is checked after saving and before final certification; this is discussed in detail in Section VII. below.)

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- You have the option as Departmental Coordinator of correcting this field as necessary for specific UDAKs if salary redistributions have been submitted but were not processed by the time the quarterly effort report data was generated. (This option is being provided as a convenience pending further improvements in the salary redistribution process and will be phased out in the future when system enhancements are implemented.)
  
- **To Enter Revised Approximate Payroll Distribution Percentages:**
  - **Tab** to the far right column for each UDAK project and enter the percentage in whole percentages without decimals.
  - At the bottom of the screen, there are two “action” buttons. Click on these to:
    - **Save Values** To save and have the system validate your entries
    - **Add New Project** To add additional UDAKs to the report

## **VII. HOW TO ADD A PROJECT TO THE EMPLOYEE’S REPORT**

- If you need to add a UDAK project to the employee’s report, click on **Add New Project** to go to the [Add a New Project Udak Page](#). Enter the 5-digit UDAK project number. For grant/contract projects, you must also enter the 2-digit project year (e.g., 01, 02, 91, etc.) Then click on **Validate this Project** and the system will confirm the project number and provide a project description. If the project number or project year you enter is invalid, an error message will be displayed and you can try again.
  
- Check to see that this is the correct project, then click on **Add this Project** to add this line to the effort report, and you will be returned to the View screen. (Since none of the salary for the quarter was allocated to this new project when the salary was initially paid, the Approximate Payroll Distribution column will display zero percent.)

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## VII. HOW TO SAVE WHAT YOU HAVE ENTERED

To save your entries, you can click on **Save Values** at any time. In order to assist you, the system will validate the following items each time you attempt to save and update the **Total Actual Labor Distribution** column highlighted in **yellow**:

- **CHECK #1 – Total Actual Labor Distribution must equal 100%:**

**Total Actual Labor Distribution** (the grand total for all projects on the report) must equal 100% before the employee submits the final report. The system will save your valid entries and display the total at the top of the screen in **red**.

- **CHECK #2 – Variance between Effort Distribution and Payroll Distribution:**

If **Total Actual Labor Distribution %** for any UDAK project varies from the **Approximate Payroll Distribution %** by greater than **+/- 5%**, the message shown below will display at the top of the screen. **If the employee's effort over the course of the fiscal year will average out to the budgeted level, then redistribution of payroll charges would not be necessary. Please note that this is only a warning message, and the employee can continue to process the final report:**

*\*\*Project: ##### --FYI: You have reported a significant variance (> 5%) between your Actual Effort Distribution and payroll charges. Please advise your Business Manager if payroll charges need to be redistributed.*

- **CHECK #3 – Sponsored Projects Effort:**

When you enter effort for a Sponsored (Grant/Contract) Project (UDAK begins with "8" or "69") or a University Research Council Project (UDAK reporting code begins with "41"), you will receive a message if you report your effort in any of the unallowable effort categories. These unallowable categories are Incremental Teaching/Clinical Time, Clinical Instruction, Clinical Services, Hospital Administration, Classroom Instruction, and Other University Activities. The message reads:

*\*\*Project: 8##### --You have reported INSTRUCTION, CLINICAL, ADMINISTRATIVE, or NON-SPONSORED Effort under a Sponsored Project, which is UNALLOWABLE.*

- **CHECK #4 – Non-Sponsored Projects Effort:**

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Please note that your Non-Sponsored Projects (state appropriations, medical center funds, departmental funds, etc.) are consolidated into one line on your report, but you can click on the link for a detailed list of these UDAKs.

When you enter effort for Non-Sponsored Projects, you will receive a message if you report your effort in the Sponsored/University Projects categories:

*\*\*Project: NON-SPONSORED FUNDS (Consolidated) --You have reported SPONSORED Effort under a Non-Sponsored Project, which is UNALLOWABLE.*

- **CHECK #5 – Incremental Teaching/Clinical Effort:**

When effort is entered in the Incremental Teaching/Clinical Time Category and not in the Clinical Instruction or Clinical Services category for that specific UDAK, the following warning is generated.

*\*\*Project #####:NON-SPONSORED FUNDS (Consolidated) --Warning: You have reported Incremental Teaching Clinic Time and you must have either Clinical Setting Instruction or Clinical Services.*

## VIII. HOW TO NOTIFY THE EMPLOYEE

- Return to the [Modify, View, or E-mail Employee Page](#) when you are ready to e-mail your employees to notify them that their effort reports are ready for review and certification. Click on the [Compose E-mail](#) link for an individual employee (or [Compose E-mail for All](#)). The following e-mail message will display in your browser's e-mail window. **You can edit this message or add any special comments or notes as needed:**

To: employee1@musc.edu  
From: Departmental Effort Coordinator  
Subject: Effort Reporting for mm/dd/yyyy – mm/dd/yyyy

*Your Effort Report for the Subject Quarter is now due.  
Click here to enter the MUSC Activity Reporting System  
<http://appserve.musc.edu/effort>*

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- **Only the employee may submit and certify the final effort report.** Please [click here to go to the Employee Guide](#) for further information on system validation checks and requirements for final submission and certification. Information is provided there about the requirement to report 100% effort, unallowable categories for Sponsored Projects, unallowable categories for Non-Sponsored Projects, and the requirement to report Average Hours Worked per Week.
- During the effort certification period, you should visit the [Modify, View, or E-mail Employee Page](#) for each of your units on a weekly basis to review final reports that have been submitted and certified by employees and follow-up on reports that are overdue. **If an employee has submitted the report, no further changes are allowed by the system. You must contact Grants and Contracts Accounting if you need to correct an error on behalf of the employee. GCA will provide instructions regarding correction and recertification at that time.**

#### **IX. HOW TO PRINT A HARDCOPY REPORT FOR YOUR FILES**

- Use your web browser's print menu if you would like to print a copy of any screen for your files. You should first set the print to "Landscape" as follows:

In Internet Explorer 5.0, select:

- On the **File** menu, click **Page Setup**.
- Under **Orientation**, click **Landscape**.
- Then click **File** and **Print**.

In Netscape 4.7, select:

- On the **File** menu, click **Print** and select **Properties**.
- Under **Orientation**, click **Landscape**.
- Then click **File** and **Print**.

#### **X. HOW TO EXIT THE WEB SYSTEM**

- You may exit the web system from any page by clicking on [Logout](#), or by closing your web browser. The application will automatically "time-out" after 30 minutes if it is not in use.



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**X. INSTRUCTIONS FOR BOOKMARKING THE LOGIN PAGE**

In Netscape 4.7

- Select the Communicator drop-down menu from the toolbar, then go to Bookmarks and select Edit Bookmarks
- Select File and choose New Bookmark
- Type in a name for the bookmark and enter "effort.musc.edu" for the Location (URL) and select OK.
- Close Bookmarks window

Netscape 7.0

- Select Bookmarks, then Manage Bookmarks
- Select File, then New Bookmark
- Type in a name for the bookmark and enter "effort.musc.edu" for the Location (URL) and select OK
- Close Bookmarks window

Internet Explorer 6.0

- Select Favorites, then Add to Favorites
- Type in a name of the bookmark and select OK
- Select Favorites and highlight the new entry
- Right click on the new entry and select Properties
- Select the Web Document tab
- Change the URL to "effort.musc.edu" and select OK