

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

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<p style="text-align: center;"><b>MEDICAL UNIVERSITY OF SOUTH CAROLINA WEB-BASED ACTIVITY REPORTING SYSTEM EMPLOYEE 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 your Departmental Effort Coordinator when your effort report for the most recent quarter is ready for you to review and certify. A link to the web site will be included in the e-mail message.
- After you receive e-mail notification from you 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](#).

[Activity Reports](#) will allow you to view and modify your Activity Reports.

[Final Submission](#) will post your Activity Reports and you will no longer be able to edit them.

[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 VIEW AND MODIFY YOUR QUARTERLY ACTIVITY REPORTS**

- Click on [Activity Reports](#) to review and modify your effort reports.
- The screen will display the **Status of Your Activity Reports Page**, which provides a list of your current and prior reports, along with the **Due Date** (60 days after the quarter end date), **Current Status** ("Submitted" or "Not Submitted"), and **Submission Date**. Reports that you have previously submitted in past quarters via paper will display as "Submitted(P)".
- Click on **Dates for Quarter** to see your report for a specific quarter. **Please note that you may view the effort reports that you have certified previously, but you can only modify those reports that have not yet been submitted.**

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**V. HOW TO ENTER YOUR EFFORT DISTRIBUTION**

- **To Navigate Around the Report:**

After you have clicked on a specific quarter, your quarterly activity report will display on the [View & Modify Your Activity Report Page](#). There are helpful web links to assist you, for example:

- You can click on any column's [Category Heading](#) to link to definitions and examples for each effort category. The current activity categories are:
  - Sponsored and University Projects
  - Cost Share
  - Incremental Teaching/Clinical Time
  - Clinical Instruction
  - Clinical Services
  - Hospital Administration
  - Classroom Instruction
  - Other University Activities
- 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, your **Approximate Payroll Distribution** for the quarter (how your 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 your Actual Effort Distribution is checked after saving and before your final certification; this is discussed in detail in Section VII. below.)
- **To Enter Your Effort Percentages:**
  - **Tab** to the appropriate column(s) for each UDAK project and enter your percent effort in whole percentages without decimals to reflect your activity for that project for the quarter.
  - At the bottom of the screen, there are three "action" buttons. Click on these to:
    - **Save Values** To save and have the system validate your entries

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- **Add New Project** To add additional UDAKs to your report
  
- **Go to Final Submission** To validate and certify your final report

## **VI. HOW TO ADD A PROJECT TO YOUR REPORT**

- If you need to add a UDAK project to the 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. ***If you are unfamiliar with UDAK project numbers, please contact your Business Manager or Departmental Effort Coordinator for assistance.***
  
- Check to see that this is the correct project, then click on **Add this Project** to add this line to your effort report, and you will be returned to the View screen. (Since none of your salary for the quarter was allocated to this new project when your salary was initially paid, the Approximate Payroll Distribution column will display zero percent.)

## **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%:**

Your **Total Actual Labor Distribution** (the grand total for all projects on the report) must equal 100% before you submit your final effort 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 your **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 your effort over the course of the fiscal year will average out to the budgeted level, then redistribution of payroll charges**

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**would not be necessary. Please note that this is only a warning message, and you can continue to process your 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 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:**

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.*

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## **VIII. HOW TO FINALIZE YOUR ACTIVITY REPORT FOR SUBMISSION & CERTIFICATION**

When you are ready to finalize your report, click on **Go to Final Submission** to display your final effort report for the quarter on the [Certify and Submit your Activity Report page](#). You can also access this function from the **Home** screen by clicking on the **Final Submission** link:

- Your final **Total Actual Labor Distribution** will display at the top of the screen. This total must equal **100%** before you submit and certify your final report for the quarter. If the total does not equal 100%, click on the **View / Modify** button to correct.
- Please read the **Certification Statement** at the top of your report carefully. When you certify your final report, you are submitting your electronic signature, which has the same importance as your written signature.
- **If you have reported effort in the categories of Incremental Teaching/ Clinical Time, Clinical Instruction, Clinical Services, Classroom Instruction or Hospital Administration, you must submit your “Average Hours Worked per Week” for the quarter in the box just below the certification statement.** This information is required for Medicare / Medicaid Cost Reporting. If you do not enter the number of hours, then you will receive an error message and must try again.
- Finally, please review the percentages and categories for your final reported effort. Once you submit, you will no longer be allowed by the system to change your report.

Click on **Submit**

- Your effort report will be validated by the system. If there are any critical error messages, you must use the **View / Modify** button in order to correct your entries before attempting to submit again. **If you submit your final report and then need to correct an error, please contact your Departmental Effort Coordinator or Business Manager for instructions.**
- You will then be returned to the [Status of Your Effort Reports Page](#) and you will see the status is now “Submitted” and today’s date will be listed as the Submission Date.

## **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**.

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- 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.