Activity Report Training for Department Coordinators
How Do I Handle This?

Where can I address questions about Activity Reporting?

Contact GCA's Effort Coordinators: Jennifer Hutson, Email: hutsonj@musc.edu or 843-792-2696 or Randy Trussell, Email: trussell@musc.edu; Phone: 843-792-6438.

Why is Activity Reporting necessary?

As a recipient of Sponsored Agreements, MUSC must have systems and procedures in place to ensure compliance with applicable regulations (OMB Uniform Guidance) concerning the documentation of the distribution of salaries and fringe benefits charged to sponsored programs and facilities and administrative (F&A) cost activities.

Additionally, as a recipient of Medicare/Medicaid funds, MUSC is required to document clinical and hospital administrative activities in order to comply with Medicare/Medicaid Cost Reimbursement requirements.

How do I know if I am covered by the After-the-Fact Activity Reporting System?

The following monthly-paid employees are covered by the system:

- All University Faculty, except faculty with 100% effort in instruction.
- All other University personnel who;
  - Cost share or directly charge activity to one or more sponsored agreements.
  - Distribute activities between direct and indirect activities

UMA Employees who are directly charged to Sponsored Agreements

All biweekly-paid employees-The distribution of salaries and wages are documented separately by MUSC's electronic time reporting system, manual time cards, or manual time sheets. No further certification or documentation is required in accordance with the OMB Uniform Guidance.
What are the employee responsibilities?

Review and electronically certify your online Quarterly Activity Report within sixty (60) days of each quarter end date.

Provide a reasonable estimate of the distribution of your activities by activity category (see category definitions) for each UDAK Project that funded his/her salary and fringe benefits for the quarter.

Inform your supervisor or responsible official during the quarter if the distribution of salary charges should be modified based on a significant change in your activities.

What are my responsibilities as an activity (effort) coordinator?

Receive all the required training: Personal training from Grants and Contracts Accounting (Jennifer Hutson), as well as take the online course and quiz to get coordinator access.

Provide training to employees in your unit, Grants and Contracts Accounting will assist with this, if needed.

Inform employees when the Online Activity Reports are available for review and certification.

Ensure that the reports are electronically submitted to GCA by the stipulated due date.

Notify the Departmental Business Manager or other appropriate departmental personnel if significant variances (greater than +/- five percent) are reported between the employee's effort percentages by UDAK project and the actual distribution of payroll charges by UDAK project.

Maintain adequate documentation to substantiate any changes to an employee's salary distribution that will meet internal and external audit requirements.

Inform GCA when you are no longer the coordinator for your unit and who your replacement will be.

What is a PEAR Form?
PEAR = Position Employee Action Request Form.

This form is submitted by the Business Manager to establish and change personnel actions (salary, position, FTE percentage, etc.) as well as establish distribution of salaries and fringe benefits by UDAK project in the payroll and financial accounting systems.

Does the Business Manager need to submit a new PEAR Form every time their is a variance on my quarterly Activity Report?

If a significant change on the Activity Report is necessary to reflect actual effort of an employee, then the Business Manager must submit retroactive adjustments to salaries and fringe benefits charges via an updated PEAR Form in accordance with Procedure 4-3.12: Initiating a Cost Transfer to/from a Sponsored Project. Although there is no precise definition for the term "significant", it has been construed as a general rule that a change applicable to a given project or activity of 5% or more of an employee's total effort warrants an adjustment. These adjustments should be implemented immediately following the employee's certification of the Activity Report.

Recognizing that workload requirements for projects and activities may vary from quarter to quarter, a significant change of greater than +/- 5% that is expected to average out to the budgeted level of effort over the course of the current fiscal year will not require retroactive salary adjustments.

What happens if I don't submit my Activity Report?

Activity Reports are considered delinquent if not completed within 60 days after the due date. Sponsored Projects UDAKs listed on any delinquent activity reports will be subject to suspension of expenditure privileges, including personnel charges, until all delinquent reports are submitted.

Why do I have employees listed in my unit who do not meet the requirements to complete activity reports?

There are different criteria are used to produce activity reports each quarter. If a report is produced for an employee that the coordinator feels should not have one, we can remove the requirements for that employee for the quarter. We just need an e-mail justification (such as this person is 100% administrative) from the employee or coordinator stating the reason(s) that the report is not required. This
justification will need to be sent every quarter in order to satisfy audit requirements.

How do I complete a report that has an NIH Salary Cap?

The NIH Salary Cap is an accounting mechanism to capture salary over the Salary Cap. Our activity reporting system will not allow percentages to be entered on that line. The total in the “Aprx Payr Distr” column on the Salary Cap line needs to be added back to the NIH awards where the work was performed. You should complete an Affiliate Salary Worksheet in order to help you with Activity Report.

I have an employee listed in my home unit who is dedicated 100% to Classroom Instruction; do they need to complete their report?

Employees who are 100% classroom instruction are exempt from activity reporting. These types of reports can be removed from the system on a quarter by quarter basis by sending an email to hutsonj@musc.edu or trussell@musc.edu (Please state in the email that the employee is 100% classroom instruction, we keep this for our audit records).

Can employees charge 100% of their time to sponsored projects for the year?

If the employee has “Professor” in their title, it is unlikely that this employee can be 100% grant funded for the year. Usually, this employee will have some administrative duties, such as serving on committees, staff meetings, proposal writing, etc. that need to be funded by an unrestricted fund source. However, if this employee has a “K” award, then they may be funded 100% by grants for the period of that “K” award.

How do we complete activity reports for terminated employees?

Print the most current activity report for this employee. If this current report needs completing, then a person at least one level higher than the employee with knowledge of his/her activities can complete the report. This hard copy can be signed by the Department Head, Department Chair or Dean if the employee is unable to certify. Please scan this report to hutsonj@musc.edu or trussell@musc.edu or fax it to 792-3235 for manual entry.

If the employee leaves during a quarter before that quarter’s activity report is produced, follow the same instructions above. Remember to change the begin date and end date on the report to match the quarter in which the employee left. Add
any necessary funding sources that funded the employee during that quarter. Please scan this report to hutsonj@musc.edu or trussell@musc.edu or fax it to 792-3235 for manual entry when that quarter’s reports are produced.

I have an employee who made an error and needs to resubmit their report. What do we do?

E-mail hutsonj@musc.edu or trussell@musc.edu requesting the activity report be reopened. If you are requesting an activity report more than one quarter back be reopened, the request must contain proper justification why the report is being recertified.

The approximate payroll distribution column is not equal to 100%, how do we complete the report?

The “Aprx Payr Distr” may not add to 100% because of rounding of percentages for each funding source. That is okay. Just be sure that the “Total Actual Labor Distr” column adds to 100%.

There are funding sources (UDAKs) listed that are not necessary to complete the report.

All UDAKs that are listed on the activity report paid part of the employee’s salary during that quarter. If the employee did not work on a certain UDAK during that quarter, do not report any activity on that UDAK. If you have not done so already, please be sure to submit a new PEAR through TEAMWORKS to reflect the activity as it is reported on that activity report.

There are funding sources (UDAKs) that should be added to the report in order to complete it.

To add a new funding source to an activity report, click on the “Add New Project” button on the front of the employee’s activity report. Then enter the UDAK and Project Year (if grant) and click on “Validate this Project” button. This will bring up the information on the new funding source. After reviewing it, click on the “Add this Project” button and the new funding source should appear on the activity report.

I have an employee with an incorrect title listed in my unit. How do we update titles on the report?
The title cannot be changed on an activity report that has already been produced. You must submit a new PEAR through TEAMWORKS marking it as “title change only”. Once this is processed through HERMIT, the title should be correct on the next activity report.

**Why do we collect the average hours per workweek information?**

If an employee reports activity in any of the clinical categories (Incremental Teaching/Clinical Time, Clinical Instruction, Clinical Services, Classroom Instruction or Hospital Admin), then the employee must provide an estimate of Average Hours per Work Week in order to meet Medicare/Medicaid Cost Reporting requirements.

**How do we report activity for an employee that is here for less than the whole 90 days in the quarter?**

If an employee is here for only 1 day during the quarter or for 89 days during the quarter, you report their activities like they were here for the whole quarter. The number of days they were here for that quarter becomes their 100%. All activity reports must equal 100% when submitted.