#### UNIVERSITY OF PUERTO RICO CENTRAL ADMINISTRATION San Juan, Puerto Rico

## INSTRUCTIONS FOR PREPARING AND PROCESSING OF TIME AND EFFORT FORM 125A and B

#### I. Purpose of the form

This form shall be used to obtain the necessary information related to the Time and Effort devoted by university personnel to federally funded projects or programs.

#### II. Preparation

- A. Form 125A Time and Effort for Establishing Payroll Distribution: At the beginning of every academic semester or summer period, the following procedures will be followed with respect to establishing estimates to initially charge sponsored and non-sponsored projects:
  - Faculty and Professional Personnel will complete the form for each academic semester and for the summer. Faculty and professional personnel at the Medical Science Campus are on a 12month schedule, and will submit the form every six months.
  - 2. An original plus two copies of the form shall be prepared and a copy shall be forwarded to each of the projects or programs to which the employee or official has rendered services and to the Chairperson and Dean of the appropriate institution to which the employee is ascribed.
  - 3. The original Time and Effort form shall be submitted to the Finance Office of the corresponding institutional unit within the first thirty (30) days of the first month of the period reported.
  - 4. The spaces and columns will be completed as follows: The upper part shall indicate the name of the campus, institutional unit or dependency. The remaining spaces are provided for the following information
    - a. Employee Name indicate the name of the employee or official.
    - b. Social Security fill in the social security number of the employee or official.
    - c. Department/Faulty indicate the department/faculty of the employee.
    - d. Position refers to the title or position that the employee or official holds.
    - e. Indicate if the employee is faculty, professional, non-professional or clerical.
    - f. Effort Report Period indicate the period that will be reported (Fall, Spring, Summer).
    - g. Year indicate the year corresponding to the period you are reporting.
    - h. Indicate if the employee has multi-campus and/or projects funded by other campuses of the UPR (Yes or No).
    - i. Campus of the Account indicate the campus that owns the account of the project.
    - j. Account Number Indicate the account number from where a payment will be received.
    - k. Cost category/Major function and Project Title Indicate the cost category or major function, and in parenthesis indicate the title of the federal project or program on which the employee or official will work.
    - Cost category/Major function Indicate the institutional cost category or major function, on which the employee or official will work.
    - m. Level of Effort indicate the committed level of effort according to the grant award
    - n. Amount Charged to Account indicate the committed amount for payment according to the grant award.

#### UNIVERSITY OF PUERTO RICO CENTRAL ADMINISTRATION San Juan, Puerto Rico

- o. Total Base Salary as Per Time and Effort total the amount that will be charged to federal and UPR accounts.
- p. Comments Regarding Payroll Adjustments and Over/Under Cost Sharing indicate comments, adjustments or observations related to the information that is included in the form.
- q. In the spaces provided, the following personnel must sign: the employee or official that filled the form, the Project Director of the project or program, and the Dean/Chair of the School under which the project or program is housed. All signatures must be dated as well.
- r. Program Director(s) signature for multi-campus or other campus projects if applicable.
- s. Finance Office Use Only A finance Office official should verify the information and sign and date the form.

#### Submission/Routing

- 1. Once signed by the employee or official, an original and a copy will be sent to the director or supervisor of the project or program and to the Chairperson and Dean of the appropriate institution to which the employee is ascribed; the employee or official should retain a copy
- 2. After the form has been certified by the director or supervisor of the project or program and by the corresponding Dean or Director, the original will be sent to the Finance Office of the institutional unit; the copy will be retained by the director or supervisor of the project or program.
- 3. The Finance Office of the institutional unit will complete the form and will keep the original on file.

# Form 125A (Summer) University of Puerto Rico Unit:



#### Time and Effort Report for Establishing Payroll Distribution

Employee Name				Social Security				
Department/Faculty				Position				
Faculty () Profession				nal () Non-Professional ()				
Multi-c	RT REPORT PERIOD campus and/or Project	s funded by campuses other	than the home	campus of the professor	Yes No	_		
If the answer is "Yes" the form will require the signature of the supra-campus projects Directors. See section below.  ONE NINTH OF INSTITUTIONAL BASE SALARY  AMOUNT:								
	EMPLOYEE'S EFFORT PAID BY SPONSORED ACCOUNTS				LEVEL OF	AMOUNT TO BE		
S	EMPLOYEE EFFORT PAID BY FEDERAL FUNDS				EFFORT %	CHARGED TO ACCOUNT	C	
U M	CAMPUS OF THE ACCOUNT	ACCOUNT NUMBERS		CATEGORY/MAJOR N and PROJECT TITLE		7.0000	M	
M							P U	
E							T	
R	EMPLOYEE E	FFORT PAID WITH COST	H COST SHARING OR MATCHING FUNDS				A T	
S							0	
Α	FMP	LOYEE'S EFFORT PAID BY	 'INSTITUTION	AL FUNDS			N S	
L A	CAMPUS OF	CAMPUS OF ACCOUNT NUMBERS COST CATEGORY or MA					3	
R	THE ACCOUNT			FUNCTION		<u> </u>		
Υ								
		TOTAL BASE SALARY AS F	<u> </u> PER TIME & EF	FORT				
		OMMENTS REGARDING P.			NDER COST SHA	RING	-	
-								
			APF	PROVAL				
Employee's signature Date					Date			
				<del></del>	Date			
Cort	tifying Officer	Date	Project	t Director(s) of	Date			
Cert	urying Officer	Date	the ho	me campus of	Date			
the faculty member								
APPROVAL FROM SUPRA-CAMPUS PROJECTS DIRECTORS								
Employee's signature Date								
шпр	loyee o dignature							
			mpus of oject Director	Supra-Campus Project Director(s) fron the faculty receives co	n which ompensation	Date		
^	alika al la co			FICE USE ONLY				
Au	Audited by: Date:							

Form 125A is to be completed by the above officials to estimate effort and compensation at the beginning of the time and effort reporting period

### Example 1

This researcher has an Institutional Base Salary of: \$70,002. His monthly salary is \$7778. This is the same as one ninth (1/9) of his salary.

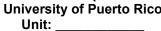
The maximum amount he/she could earn in Summer is: 3x\$7778 =\$23,334 All his effort will be at UPR-Mayaguez Campus (Campus Code 30)

### This researcher has the following effort for summer:

	Amount charged to project in		Person					
Activity	summer	% Effort	Months					
Research								
Project 1 (Federal funds)	\$10,000.00	43%	1.29					
Project 2 (Federal funds)	\$1,000.00	4%	0.13					
Project 3 (Non-Federal funds)	\$4,500.00	19%	0.58					
	Teaching							
	Administration							
Department Head	\$2850 (3 months bonus)	12%	0.36					
	Other							
TOTAL SUMMER EFFORT	\$18,350.00	78%	2.35					

His Form 125A Summer will look as shown in the next page:

# Form 125A (Summer) University of Puerto Rico





### Time and Effort Report for Establishing Payroll Distribution

Employee Name				Social Security				
Depart	ment/Faculty			Position				
	Faculty () Professional () Non-Professional ()							
Multi-c	ampus and/or Projec swer is "Yes" the form will re	D: Summer of Year2012_ ts funded by campuses other quire the signature of the supra-campuse	than the home	e campus of the professor \ . See section below.	/es No _x_	_		
ONE N	ONE NINTH OF INSTITUTIONAL BASE SALARY  AMOUNT: \$23,334							
	EMPLOYEE'S EFFORT PAID BY SPONSORED ACCOUNTS					AMOUNT TO BE		
S		EMPLOYEE EFFORT PAID BY FEDERAL FUNDS				CHARGED TO	С	
U	CAMPUS OF	ACCOUNT NUMBERS		CATEGORY/MAJOR	- %	ACCOUNT	O	
M	THE ACCOUNT	(00 digita UEIO account)		N and PROJECT TITLE	400/	<b>#</b> 40.000	M P	
M	30 30	(32 digits UFIS account) (32 digits UFIS account)		oject 1: Bla bla bla oject 2: Bla bla bla	43% 4%	\$10,000 \$1,000	Ü	
E	30	(32 digits UFIS account)	Pic	oject 2: Bia bia bia	4%	\$1,000	Т	
R	EMPLOYEE	EFFORT PAID WITH COST S	SHARING OR	MATCHING FUNDS			A	
•	30	(32 digits UFIS account)		ect 3: Bla bla bla *	19%	\$4,500	T	
S							Ö	
Α			<u> </u>				N	
L		PLOYEE'S EFFORT PAID BY			4		S	
Α	CAMPUS OF THE ACCOUNT	ACCOUNT NUMBERS COST C		CATEGORY or MAJOR FUNCTION				
R	30	(32 digits UFIS account) De		epartment Head	12%	\$2,830	-	
Υ		(OZ digito Of 10 decedity)		<del>opartment rioda</del>	1270	Ψ2,000		
		TOTAL BASE SALARY AS P	ER TIME & EI	FFORT	78%	\$18,350		
	C	COMMENTS REGARDING PA				RING		
		* This project	t is funded by	/ (non-federal spo	onsor)			
-								
	Investigador		API	PROVAL				
	oloyee's signature	Date			Date			
	noyoo o olgilatalo	Bato			Dato			
					Date			
Dean of				t Dinastan(a) of	Data			
Cert	ifying Officer	Date	Project Director(s) of the home campus of		Date			
				culty member				
		APPROVAL FR		AMPUS PROJECTS DIRE	CTORS			
		7						
Employee's signature Date		Date						
Campus of			Supra-Campus		Date			
Project Director			Project Director(s) from					
				the faculty receives cor	mpensation			
	FINANCE OFFICE USE ONLY							
Au	Audited by: Date:							

Form 125A is to be completed by the above officials to estimate effort and compensation at the beginning of the time and effort reporting period

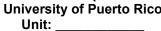
#### Example 2

This researcher has an Institutional Base Salary of: \$63,000. His monthly salary is \$7,000. This is the same as one ninth (1/9) of his salary. The maximum amount he/she could earn in Summer is: 3x\$7,000 =\$21,000 All his effort will be at UPR-Mayaguez Campus (Campus Code 30)

#### This researcher has the following effort for summer:

	Amount charged to project in		Person			
Activity	summer	% Effort	Months			
Research						
Project 1	\$10,000.00	48%	1.43			
Project 2	\$1,000.00	5%	0.14			
	Teaching					
INGE-3016	\$7,000.00	38%	1.13			
	Administration					
Other						
TOTAL SUMMER						
EFFORT	\$18,000.00	90%	2.70			

# Form 125A (Summer) University of Puerto Rico





#### Time and Effort Report for Establishing Payroll Distribution

Employee Name				Social Security				
Department/Faculty				Position				
Faculty () Professional () Non-Professional ()								
Multi-c	RT REPORT PERIOD campus and/or Project swer is "Yes" the form will red	D: Summer of Yearts funded by campuses other to guire the signature of the supra-campus	than the home	e campus of the professor	Yes No	_		
		ONAL BASE SALARY	projecto	. 000 00000 20.0	AMOUNT: \$2	21,000		
	EMPLOYEE'S EFFORT PAID BY SPONSORED ACCOUNTS				LEVEL OF	AMOUNT TO BE		
S		EMPLOYEE EFFORT PAID B	Y FEDERAL	FUNDS	EFFORT	CHARGED TO ACCOUNT	С	
U	CAMPUS OF	ACCOUNT NUMBERS		CATEGORY/MAJOR	- %		0	
M	THE ACCOUNT			N and PROJECT TITLE	:20/		M P	
M	30	(32 digits UFIS account)		oject 1: Bla bla bla	48%	\$10,000	- U	
Е	30	(32 digits UFIS account)	Pro	oject 2: Bla bla bla	5%	\$1,000	Ť	
R	EMPLOYEE I	EFFORT PAID WITH COST S	HARING OR	MATCHING FUNDS			A T	
C						<del> </del>	- 1	
S			<b> </b>		+	<del> </del>	0	
Α	EMP	U OVEE'S EFFORT PAID RY	AOITHITION	IAI ELINDS	+	<u> </u>	N	
L	EMPLOYEE'S EFFORT PAID BY INSTITUTION, CAMPUS OF ACCOUNT NUMBERS COST CA			CATEGORY or MAJOR	4		S	
Α	THE ACCOUNT	ACCOUNT NOWIDENCE		FUNCTION				
R		30 (32 digits UFIS account)		Teaching	38%	\$7,000	┦	
Υ		( <b>0</b> 2 3. <b>3</b> )			1 1	, 		
					1			
		TOTAL BASE SALARY AS P	ER TIME & EI	FFORT	90%	\$18,000		
	C	OMMENTS REGARDING PA	YROLL ADJL	STMENTS AND OVER/UN	DER COST SHAF	RING		
			API	PROVAL				
	Investigador			<del> </del>				
Emp	oloyee's signature	Date			Date			
					Date			
	Dept. Head.				Date			
Cert	tifying Officer	Date	Projec	ct Director(s) of	Date			
	- ,		the home campus of					
			the fac	culty member				
		APPROVAL FR	OM SUPRA-C	CAMPUS PROJECTS DIRE	CTORS			
<del></del>	tttat-ma	D-4-			<del></del>			
Employee's signature Date		Date						
		<del></del>						
		Can	npus of	Supra-Campus		Date		
Project Directo			ect Director	Project Director(s) from				
				the faculty receives cor	mpensation			
FINANCE OFFICE USE ONLY								
Au	Audited by: Date:							

Form 125A is to be completed by the above officials to estimate effort and compensation at the beginning of the time and effort reporting period

