

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:
 1. 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 12-month 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/Faculty – 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.
 - l. 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.

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- 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 (___) Professional (___) Non-Professional (___)					
EFFORT REPORT PERIOD: Summer of Year _____					
Multi-campus and/or Projects funded by campuses other than the home campus of the professor Yes ___ No ___					
<small>If the answer is "Yes" the form will require the signature of the supra-campus projects Directors. See section below.</small>					
ONE NINTH OF INSTITUTIONAL BASE SALARY		AMOUNT:			
S U M M E R S A L A R Y	EMPLOYEE'S EFFORT PAID BY SPONSORED ACCOUNTS			C O M P U T A T I O N S	
	EMPLOYEE EFFORT PAID BY FEDERAL FUNDS				
	CAMPUS OF THE ACCOUNT	ACCOUNT NUMBERS	COST CATEGORY/MAJOR FUNCTION and PROJECT TITLE		LEVEL OF EFFORT %
	EMPLOYEE EFFORT PAID WITH COST SHARING OR MATCHING FUNDS				
	EMPLOYEE'S EFFORT PAID BY INSTITUTIONAL FUNDS				
	CAMPUS OF THE ACCOUNT	ACCOUNT NUMBERS	COST CATEGORY or MAJOR FUNCTION		
TOTAL BASE SALARY AS PER TIME & EFFORT					
COMMENTS REGARDING PAYROLL ADJUSTMENTS AND OVER/UNDER COST SHARING					
APPROVAL					
_____ Employee's signature	_____ Date	_____ _____ _____ Project Director(s) of the home campus of the faculty member	_____ Date _____ Date _____ Date		
APPROVAL FROM SUPRA-CAMPUS PROJECTS DIRECTORS					
_____ Employee's signature	_____ Date	_____ _____ _____ Campus of Project Director	_____ _____ _____ Supra-Campus Project Director(s) from which the faculty receives compensation		
			_____ Date		
FINANCE OFFICE USE ONLY					
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: $3 \times \$7778 = \$23,334$

All his effort will be at UPR-Mayaguez Campus (Campus Code 30)

This researcher has the following effort for summer:

Activity	Amount charged to project in summer	% Effort	Person 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

Unit: _____

Time and Effort Report for Establishing Payroll Distribution



Employee Name			Social Security	
Department/Faculty			Position	
Faculty (<input type="checkbox"/>) Professional (<input type="checkbox"/>) Non-Professional (<input type="checkbox"/>)				
EFFORT REPORT PERIOD: Summer of Year <u>2012</u>				
Multi-campus and/or Projects funded by campuses other than the home campus of the professor Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>				
<small>If the answer is "Yes" the form will require the signature of the supra-campus projects Directors. See section below.</small>				
ONE NINTH OF INSTITUTIONAL BASE SALARY			AMOUNT: \$23,334	

S U M M E R S A L A R Y	EMPLOYEE'S EFFORT PAID BY SPONSORED ACCOUNTS			LEVEL OF EFFORT %	AMOUNT TO BE CHARGED TO ACCOUNT	C O M P U T A T I O N S
	EMPLOYEE EFFORT PAID BY FEDERAL FUNDS					
	CAMPUS OF THE ACCOUNT	ACCOUNT NUMBERS	COST CATEGORY/MAJOR FUNCTION and PROJECT TITLE			
	30	(32 digits UFIS account)	Project 1: Bla bla bla	43%	\$10,000	
	30	(32 digits UFIS account)	Project 2: Bla bla bla	4%	\$1,000	
	EMPLOYEE EFFORT PAID WITH COST SHARING OR MATCHING FUNDS					
	30	(32 digits UFIS account)	Project 3: Bla bla bla *	19%	\$4,500	
	EMPLOYEE'S EFFORT PAID BY INSTITUTIONAL FUNDS					
	CAMPUS OF THE ACCOUNT	ACCOUNT NUMBERS	COST CATEGORY or MAJOR FUNCTION			
	30	(32 digits UFIS account)	Department Head	12%	\$2,830	
TOTAL BASE SALARY AS PER TIME & EFFORT			78%	\$18,350		

COMMENTS REGARDING PAYROLL ADJUSTMENTS AND OVER/UNDER COST SHARING	
* This project is funded by _____ (non-federal sponsor)	

APPROVAL			
<u>Investigador</u>			
Employee's signature	Date	_____	Date
		_____	Date
<u>Dean of...</u>		_____	Date
Certifying Officer	Date	Project Director(s) of the home campus of the faculty member	Date

APPROVAL FROM SUPRA-CAMPUS PROJECTS DIRECTORS			
Employee's signature	Date	_____	_____
		_____	_____
		Campus of Project Director	Supra-Campus Project Director(s) from which the faculty receives compensation
			Date

FINANCE OFFICE USE ONLY	
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: $3 \times \$7,000 = \$21,000$

All his effort will be at UPR-Mayaguez Campus (Campus Code 30)

This researcher has the following effort for summer:

Activity	Amount charged to project in summer	% Effort	Person 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

Unit: _____

Time and Effort Report for Establishing Payroll Distribution



Employee Name			Social Security		
Department/Faculty			Position		
Faculty (<input type="checkbox"/>) Professional (<input type="checkbox"/>) Non-Professional (<input type="checkbox"/>)					
EFFORT REPORT PERIOD: Summer of Year _____					
Multi-campus and/or Projects funded by campuses other than the home campus of the professor Yes ____ No ____					
<small>If the answer is "Yes" the form will require the signature of the supra-campus projects Directors. See section below.</small>					
ONE NINTH OF INSTITUTIONAL BASE SALARY			AMOUNT: \$21,000		
S U M M E R S A L A R Y	EMPLOYEE'S EFFORT PAID BY SPONSORED ACCOUNTS			LEVEL OF EFFORT %	AMOUNT TO BE CHARGED TO ACCOUNT
	EMPLOYEE EFFORT PAID BY FEDERAL FUNDS				
	CAMPUS OF THE ACCOUNT	ACCOUNT NUMBERS	COST CATEGORY/MAJOR FUNCTION and PROJECT TITLE		
	30	(32 digits UFIS account)	Project 1: Bla bla bla	48%	\$10,000
	30	(32 digits UFIS account)	Project 2: Bla bla bla	5%	\$1,000
	EMPLOYEE EFFORT PAID WITH COST SHARING OR MATCHING FUNDS				
	EMPLOYEE'S EFFORT PAID BY INSTITUTIONAL FUNDS				
	CAMPUS OF THE ACCOUNT	ACCOUNT NUMBERS	COST CATEGORY or MAJOR FUNCTION		
	30	(32 digits UFIS account)	Teaching	38%	\$7,000
	TOTAL BASE SALARY AS PER TIME & EFFORT			90%	\$18,000
COMMENTS REGARDING PAYROLL ADJUSTMENTS AND OVER/UNDER COST SHARING					

APPROVAL					
_____ Investigador Employee's signature		_____ Date		_____ Date	
_____ Dept. Head. Certifying Officer		_____ Date		_____ Date	
		_____ Project Director(s) of the home campus of the faculty member		_____ Date	
APPROVAL FROM SUPRA-CAMPUS PROJECTS DIRECTORS					
_____ Employee's signature		_____ Date		_____ Date	
		_____ Campus of Project Director		_____ Supra-Campus Project Director(s) from which the faculty receives compensation	
				_____ Date	
FINANCE OFFICE USE ONLY					
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

