

Time and Effort

Automated Tracking and Reminder System



BAR Presentation
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What is Time and Effort?

- Time and effort reports are after-the-fact **records that reflect how faculty and staff spent the time** for which they were compensated by the educational institution...
- The purpose of federally mandated time and effort reporting is to provide documentation to substantiate payroll charges. **For example, if 25% of an individual's time was charged to a federal grant, time and effort reports must substantiate that the individual spent at least 25% of their time working on activities to support that federal grant.**
- Time and effort reports must be a single, certified document that **reflect 100% of an employee's time** worked in a given period.
- Proper time and effort reporting includes accounting for salary, wages and benefits and certifying actual time charges for:
 - 1. Each federal grant program.
 - 2. Cost-sharing, matching funds, or leveraged funds required for federal grants.
 - 3. All other activity not funded by a grant (grant and non-grant time) for which the individual staff are compensated.

[Time & Effort Reporting Guidelines \(sbctc.edu\)](http://sbctc.edu)

Challenges



Low rate of form submission



Late submission of forms



Significant time spent tracking and reminding grant employees



Lack of form training

Solutions



Act as the form submission method



Track pay periods needing T&E forms for each employee on a grant



Track form submission with date



Automatically remind employees, escalating with increased time past due



Serve as a one-stop place for everything T&E forms/information/training

What is changing...



Submission Method

All forms will now only be submitted as attachments to a record through T&E Sharepoint site, NOT via email.



Tracking

Each combo of person, grant and pay period will have a record.

This record tracks the various dates related to submission and acceptance.



Reminders

Automated notifications and reminders for approx. 60 employees per pay period.

Significant reduction in manual work.

What is not changing...



Form

Both T&E forms stay the same



Approval

No change to who signs your form



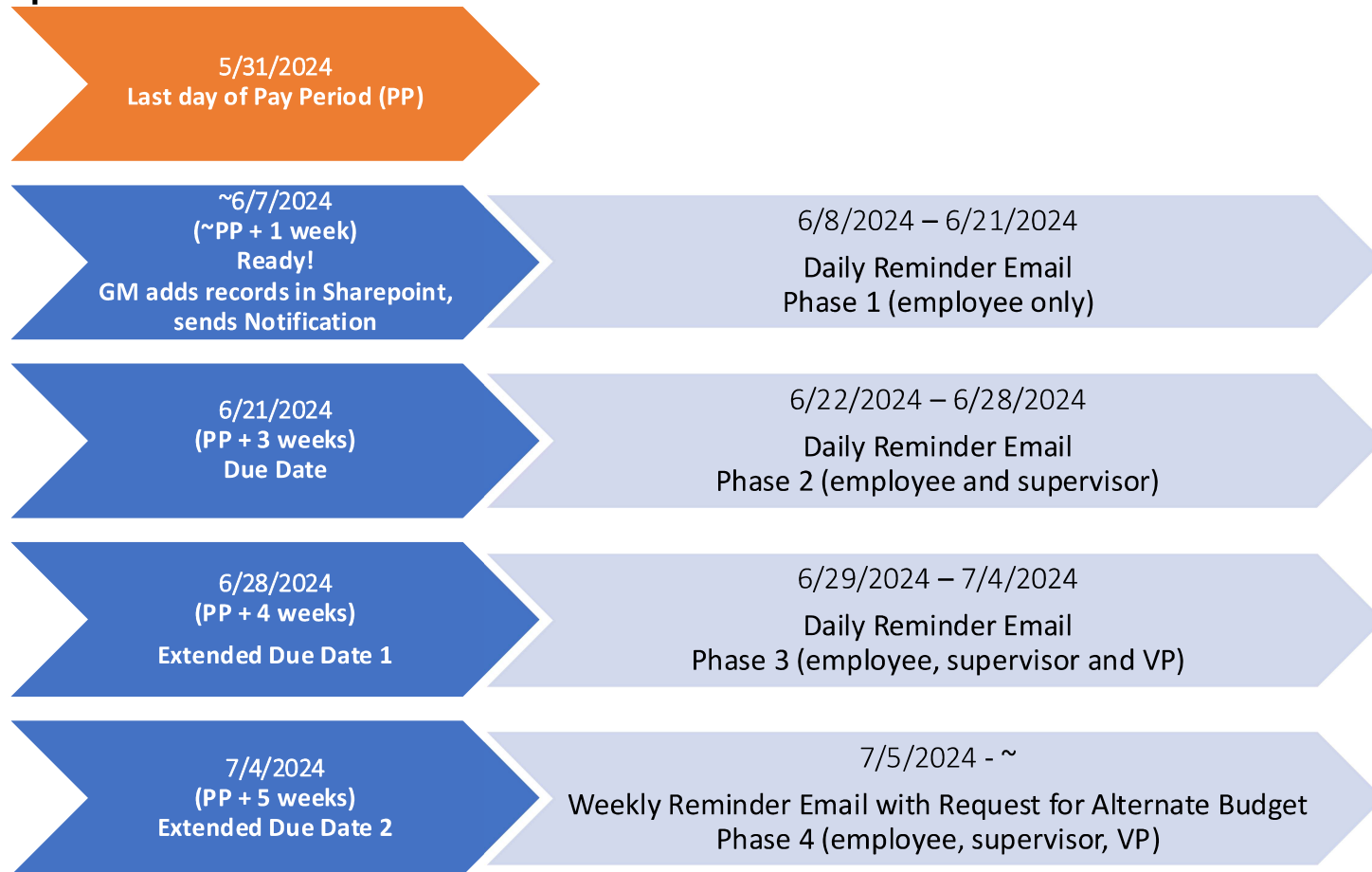
Deadline

Forms as still due to Finance within 3 weeks of the end of the pay period

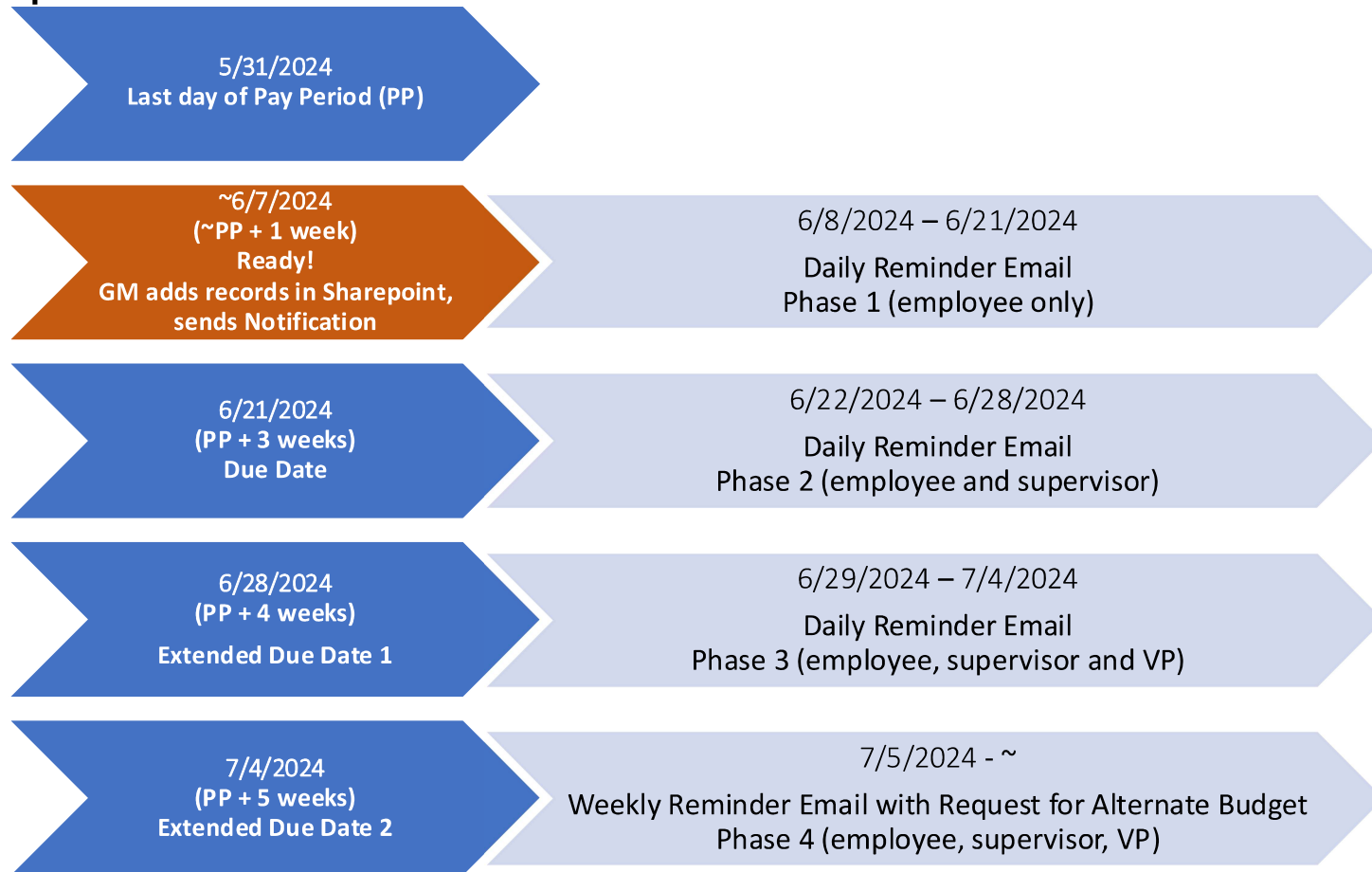
Security and Confidentiality

- Employees can only see their own records
- Supervisors can only see their employees' records
- Only Admins (Sung and Jennifer) can see all records
- No financial data! Employee ID, Name, Grant/Dept, Pay Period, Supervisor, Admin/VP

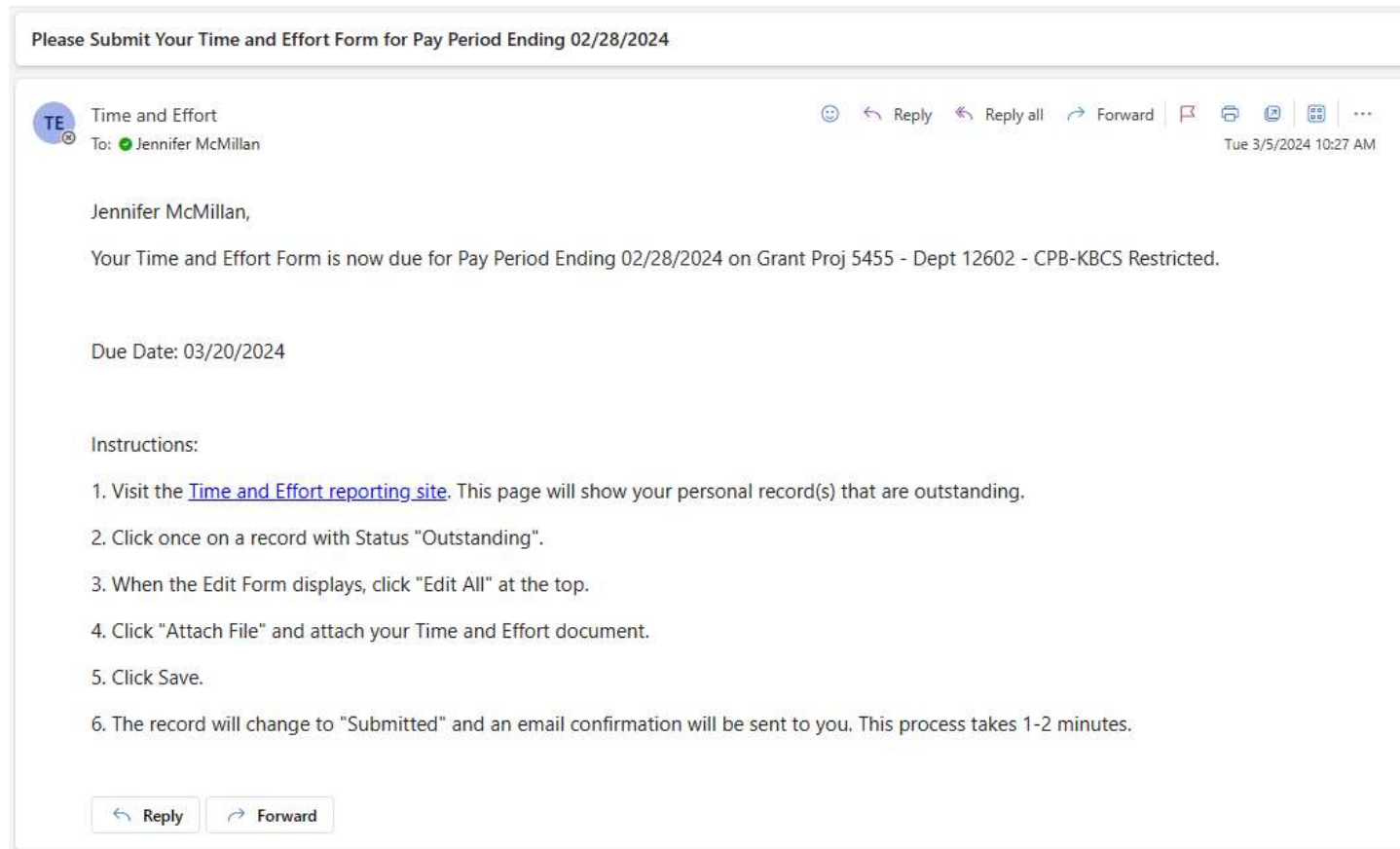
Example Timeline



Example Timeline



Sample email – Notification (T&E is ready)



Time and Effort Sharepoint Site - Landing Page

MyBC

Time and Effort

Welcome to T&E

My Outstanding Time & ...

My Time & Effort

Supervisor: My Employee...

Supervisor: My Employee...

Edit

+ New

Promote

Page details

Immersive Reader

Analytics

Welcome to Time and Effort for Grants!

Instructions:

1. Click [My Outstanding T&E's](#)

2. Select an outstanding "card"

3. Click 'Edit All'

4. Click 'Attach File'

5. Locate file and click 'Open'

6. Click 'Save'

After attaching a file, please allow 1-2 minutes for processing. The Status will update to "Submitted" once processed. Refresh your browser to see updated status.

Employees

My Outstanding T&E's

View all of My T&E's

Supervisors

My Employees' Outstanding T&E's

View all of My Employees' T&E's

Who needs to submit a Time and Effort form?

When do I need to submit a Time and Effort form?

Time and Effort Sharepoint Site - Landing Page

My BC Time and Effort

Welcome to T&E

+ New Promote Page details Immersive Reader Analytics

My Outstanding Time & ...

My Time & Effort

Supervisor: My Employee...

Supervisor: My Employee...

Edit

Welcome to Time and Effort for Grants!

Instructions:

1. Click [My Outstanding T&E's](#)
2. Select an outstanding "card"
3. Click 'Edit All'
4. Click 'Attach File'
5. Locate file and click 'Open'
6. Click 'Save'

After attaching a file, please allow 1-2 minutes for processing. The Status will update to "Submitted" once processed. Refresh your browser to see updated status.

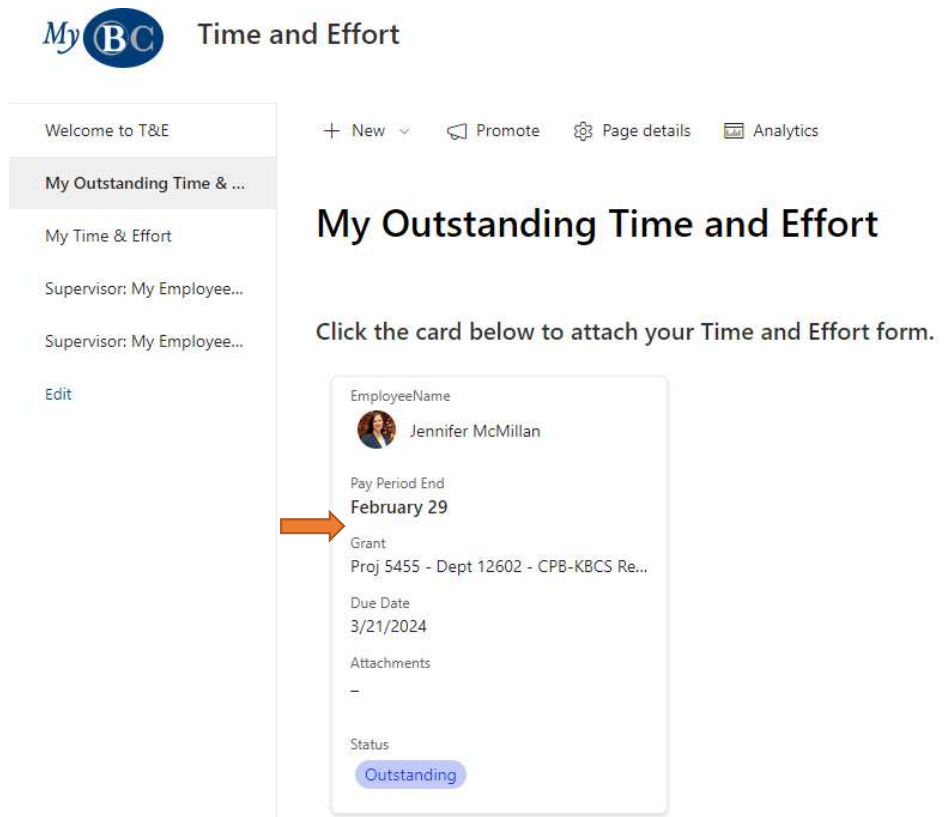
Employees	Supervisors
My Outstanding T&E's	My Employees' Outstanding T&E's
View all of My T&E's	View all of My Employees' T&E's

Who needs to submit a Time and Effort form?

When do I need to submit a Time and Effort form?

Time and Effort Site – My Outstanding Time and Effort

This screen shows all Time and Effort records where I have not turned in a T&E form.



The screenshot displays the 'MyBC Time and Effort' interface. On the left is a sidebar with navigation links: 'Welcome to T&E', 'My Outstanding Time & ...' (highlighted), 'My Time & Effort', 'Supervisor: My Employee...', 'Supervisor: My Employee...', and 'Edit'. The top right of the main area contains links for '+ New', 'Promote', 'Page details', and 'Analytics'. The main heading is 'My Outstanding Time and Effort', followed by the instruction 'Click the card below to attach your Time and Effort form.' A card for Jennifer McMillan is shown with the following details: 'Pay Period End February 29' (indicated by an orange arrow), 'Grant Proj 5455 - Dept 12602 - CPB-KBCS Re...', 'Due Date 3/21/2024', 'Attachments' (with a minus sign), and 'Status Outstanding' (in a blue button).

MyBC Time and Effort

Welcome to T&E

My Outstanding Time & ...

My Time & Effort

Supervisor: My Employee...

Supervisor: My Employee...


Edit

+ New Promote Page details Analytics

My Outstanding Time and Effort

Click the card below to attach your Time and Effort form.

EmployeeName

 Jennifer McMillan

Pay Period End
February 29

Grant
Proj 5455 - Dept 12602 - CPB-KBCS Re...

Due Date
3/21/2024

Attachments
-

Status
Outstanding

Time and Effort Site

Update a Record

Welcome to T&E

My Outstanding Time & ...

My Time & Effort

Supervisor: My Employee...

Supervisor: My Employee...

Edit

Edit all

Time and Ef... > TETracking > **Item properties**

EmployeeName	Jennifer McMillan
Pay Period End	2/29/2024
EMPLID	
Grant	Proj 5455 - Dept 12602 - CPB-KBCS Restricted
Status	Outstanding
Attachments	There is nothing attached.

Instructions:

1. Click 'Edit All'
2. Click 'Attach File'
3. Locate file and click 'Open'
4. Click 'Save'

After attaching a file, please allow 1-2 minutes for processing. The Status will update to "Submitted" once processed. Refresh your browser to see updated.

Time and Effort Site Update a Record

Instructions:

1. Click 'Edit All'

Welcome to T&E

My Outstanding Time & ...

My Time & Effort

Supervisor: My Employee...

Supervisor: My Employee...

Edit

Edit all

Time and Ef... > TETracking > Item properties

EmployeeNameJennifer McMillan

Pay Period End2/29/2024

EMPLID

GrantProj 5455 - Dept 12602 - CPB-KBCS Restricted

StatusOutstanding

Attachments

There is nothing attached.

Instructions:

1. Click 'Edit All'

2. Click 'Attach File'

3. Locate file and click 'Open'

4. Click 'Save'

After attaching a file, please allow 1-2 minutes for processing. The Status will update to "Submitted" once processed. Refresh your browser to see updated.

Time and Effort Site Update a Record

Instructions:

1. Click 'Edit All'
2. Click 'Attach File'
3. Locate file and click 'Open'

Welcome to T&E

My Outstanding Time & ...

My Time & Effort

Supervisor: My Employee...

Supervisor: My Employee...


Edit

Save X Cancel

Time and Ef... > TETTracking > **Item properties**

EmployeeName Jennifer McMillan


Pay Period End 2/29/2024

EMPLID 

Grant Proj 5455 - Dept 12602 - CPB-KBCS Restricted

Status Outstanding

Attachments There is nothing attached.

 Attach file

Instructions:

1. Click 'Edit All'
2. Click 'Attach File'
3. Locate file and click 'Open'
4. Click 'Save'

After attaching a file, please allow 1-2 minutes for processing. The Status will update to "Submitted" once processed. Refresh your browser to see updated.

Time and Effort Site Update a Record

Instructions:

1. Click 'Edit All'
2. Click 'Attach File'
3. Locate file and click 'Open'

The screenshot displays the 'Time and Effort Site' interface. On the left, a sidebar contains links: 'Welcome to T&E', 'My Outstanding Time & ...', 'My Time & Effort', 'Supervisor: My Employee...', 'Supervisor: My Employee...', and 'Edit'. The main content area shows the 'Item properties' page for 'Time and Ef... > TETTracking > Item properties'. The properties include: 'EmployeeName' (Jennifer McMillan), 'Pay Period End' (2/29/2024), 'EMPLID' (a blue box), 'Grant' (Proj 5455 - Dept 12602 - CPB-KBCS Restricted), and 'Status' (Outstanding). Below these is an 'Attachments' section with the message 'There is nothing attached.'.

Overlaid on the bottom is a Windows 'Open' file dialog. The path is 'This PC > Documents > To Upload to Sharepoint'. The left sidebar shows folders: 'Lean Events', 'Microsoft 365 browser exten:', 'Microsoft Teams Chat Files', 'Microsoft Teams Data', 'Notebooks', and 'Office extension'. The main pane shows a table with columns 'Name', 'Date modified', and 'Type'. A file named 'DemoFile.txt' is selected, with a date modified of '5/29/2024 11:03 AM' and type 'Text Docu'.

4. Click Save

After attaching a file, please allow 1-2 minutes for processing. The Status will update to "Submitted" once processed. Refresh your browser to see updated.

Time and Effort Site Update a Record

Instructions:

1. Click 'Edit All'
2. Click 'Attach File'
3. Locate file and click 'Open'
4. Click 'Save'

Welcome to T&E

My Outstanding Time & ...

My Time & Effort

Supervisor: My Employee...

Supervisor: My Employee...

Edit

 Save  Cancel

Time and Ef... > TETTracking > Item properties

EmployeeName Jennifer McMillan

Pay Period End 2/29/2024

EMPLID


Grant Proj 5455 - Dept 12602 - CPB-KBCS Restricted

Status Outstanding

Attachments



Demo Time a... U... 

 Attach file

Instructions:

1. Click 'Edit All'
2. Click 'Attach File'
3. Locate file and click 'Open'
4. Click 'Save'

After attaching a file, please allow 1-2 minutes for processing. The Status will update to "Submitted" once processed. Refresh your browser to see updated.

Time and Effort Site Update a Record

Instructions:

1. Click 'Edit All'
2. Click 'Attach File'
3. Locate file and click 'Open'
4. Click 'Save'

Welcome to T&E

My Outstanding Time & ...

My Time & Effort

Supervisor: My Employee...

Supervisor: My Employee...

Edit

Save Cancel

Time and Ef... > TETTracking > Item properties

EmployeeName Jennifer McMillan

Pay Period End 2/29/2024

EMPLID

Grant Proj 5455 - Dept 12602 - CPB-KBCS Restricted

Status Outstanding

Attachments

Demo Time a... U... X

Attach file

Instructions:

1. Click 'Edit All'
2. Click 'Attach File'
3. Locate file and click 'Open'
4. Click 'Save'

After attaching a file, please allow 1-2 minutes for processing. The Status will update to "Submitted" once processed. Refresh your browser to see updated.

Time and Effort Site Update a Record

Instructions:

1. Click 'Edit All'
2. Click 'Attach File'
3. Locate file and click 'Open'
4. Click 'Save'

After attaching a file, please allow 1-2 minutes for processing. The Status will update to "Submitted" once processed. Refresh your browser to see updated.

Welcome to T&E

My Outstanding Time & ...

My Time & Effort


Supervisor: My Employee...

Supervisor: My Employee...

Edit

Edit all

Time and Ef... > TETracking > Item properties

EmployeeName	Jennifer McMillan
Pay Period End	2/29/2024
EMPLID	
Grant	Proj 5455 - Dept 12602 - CPB-KBCS Restricted
Status	Outstanding
Attachments	 Demo Time and Effort...

Instructions:

1. Click 'Edit All'

2. Click 'Attach File'

3. Locate file and click 'Open'

4. Click 'Save'

After attaching a file, please allow 1-2 minutes for processing. The Status will update to "Submitted" once processed. Refresh your browser to see updated.

Time and Effort Site

My Time and Effort



Welcome to T&E

My Outstanding Time & ...

My Time & Effort

Supervisor: My Employee...

Supervisor: My Employee...

Edit

+ New Promote Page details Analytics

My Time and Effort

Click the card below to attach your Time and Effort form.

EmployeeName
 Jennifer McMillan

Pay Period End
February 29

Grant
Proj 5455 - Dept 12602 - CPB-KBCS Re...

Due Date
3/21/2024

Attachments

Status
Submitted

EmployeeName
 Jennifer McMillan

Pay Period End
February 22

Grant
Proj 5455 - Dept 12602 - CPB-KBCS Re...

Due Date
3/21/2024

Attachments

Status
Approved

Edit all

Time and Ef... > TETracking > Item properties

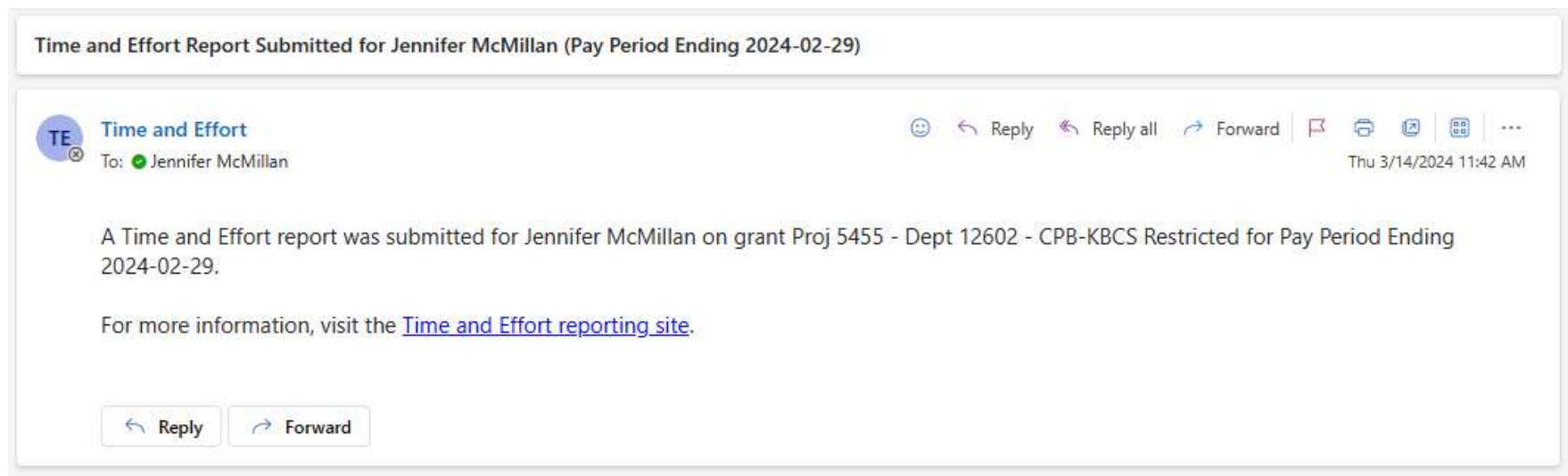
EmployeeName	Jennifer McMillan
Pay Period End	2/29/2024
EMPLID	
Grant	Proj 5455 - Dept 12602 - CPB-KBCS Restricted
Status	Submitted
Attachments	Demo Time and Effort...

Instructions:

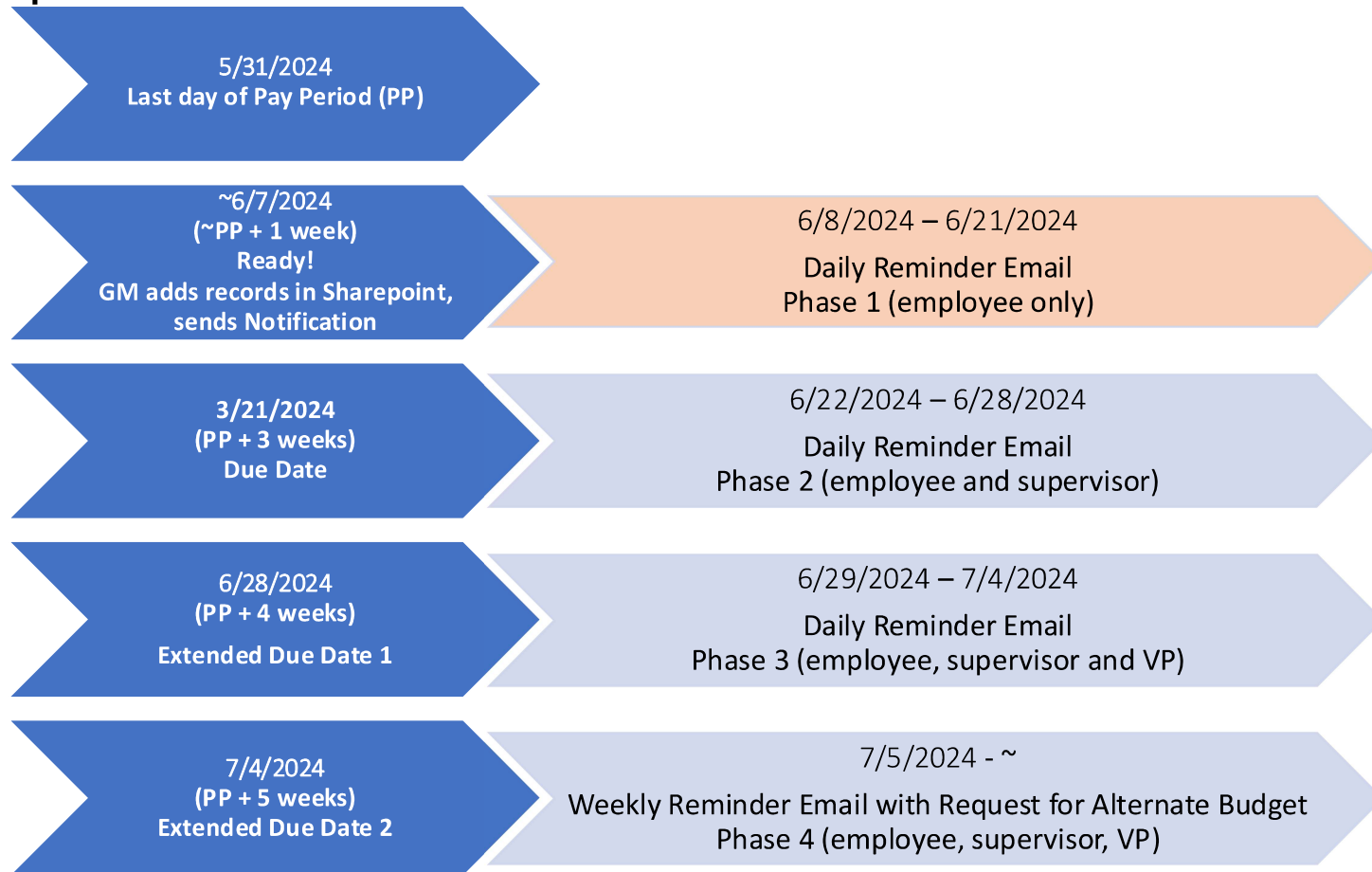
1. Click 'Edit All'
2. Click 'Attach File'
3. Locate file and click 'Open'
4. Click 'Save'

After attaching a file, please allow 1-2 minutes for processing. The Status will update to "Submitted" once processed. Refresh your browser to see updated.

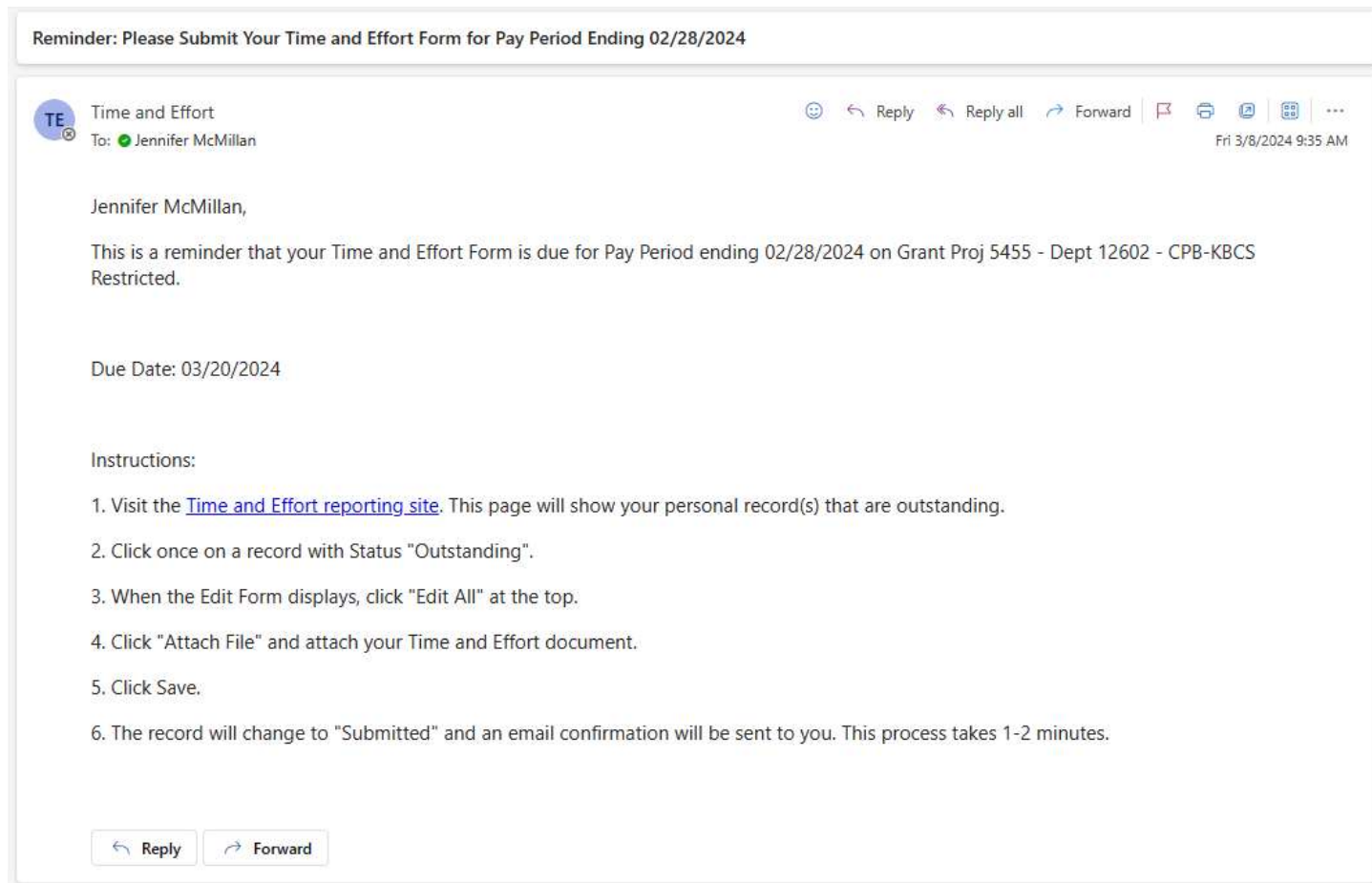
Sample email – Notification (T&E is submitted)



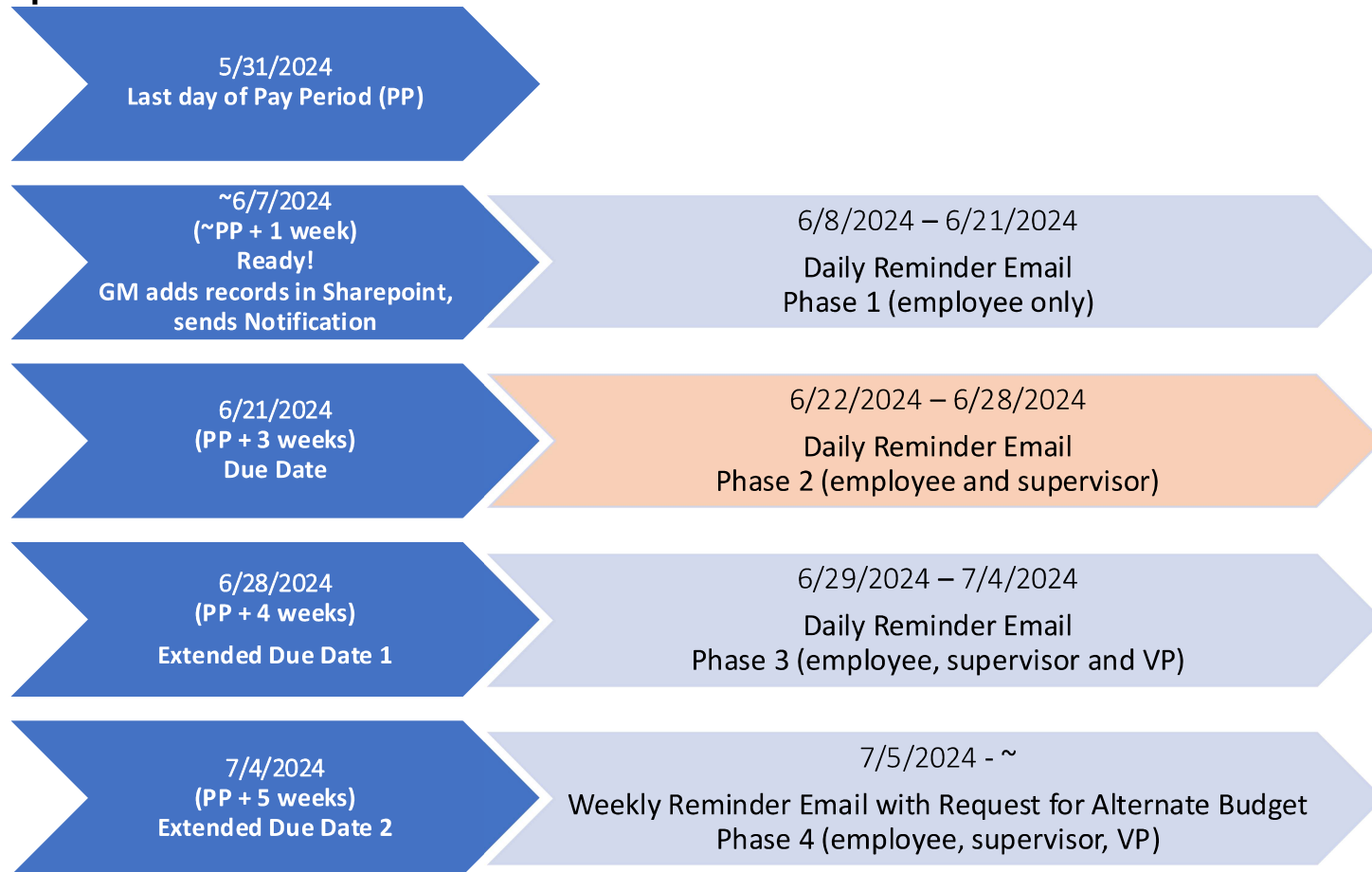
Example Timeline



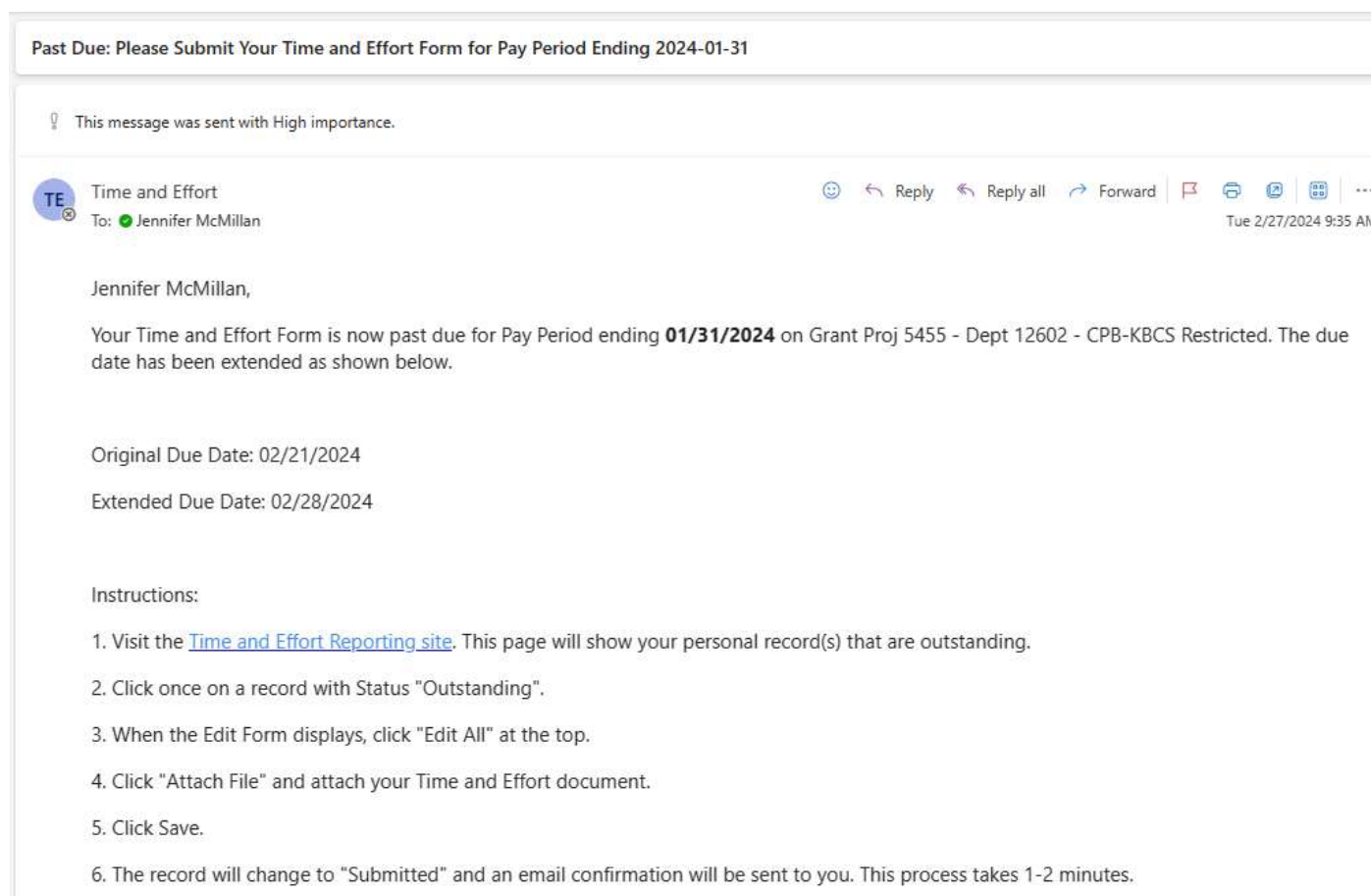
Sample email – Daily Notification (Prior to Due Date – Phase 1)



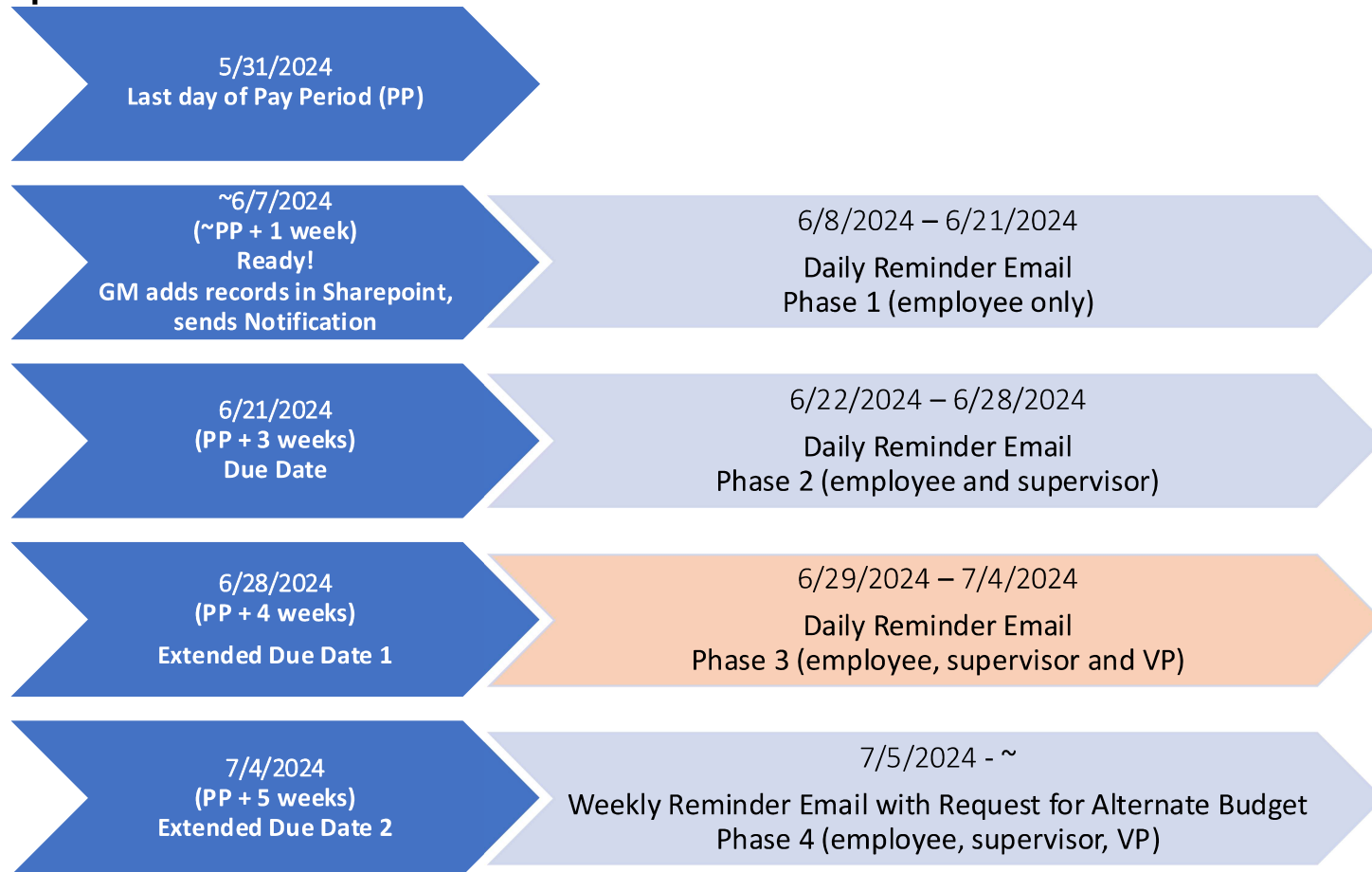
Example Timeline



Sample email – Daily Notification (Past Due – Phase 2)



Example Timeline



Sample email – Daily Notification (Past Due – Phase 3)

Past Due: Submit Your Time and Effort Form for Pay Period Ending 2024-01-31

 This message was sent with High importance.



Time and Effort

To:  Jennifer McMillan;  Sung Moon;  Sung Moon



Tue 3/5/2024 9:51 AM

Jennifer McMillan,

Your Time and Effort Form is now past due and **out of compliance** for Pay Period ending 01/31/2024 on Grant Proj 5455 - Dept 12602 - CPB-KBCS Restricted. The due date was extended as shown below, but our records indicate that the form is not yet submitted.

Original Due Date: 02/21/2024

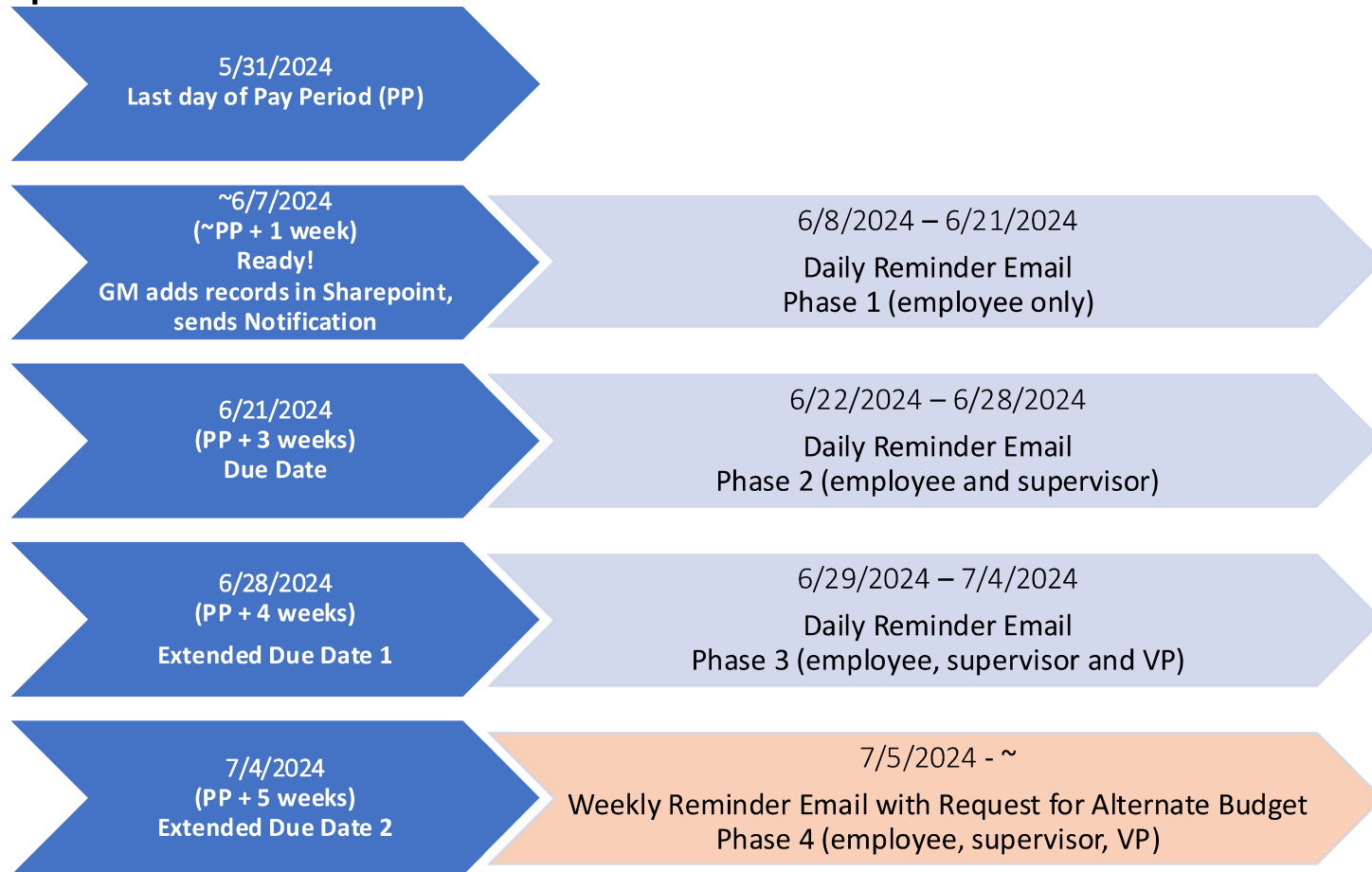
Extended Due Date: 02/28/2024

Now Due Immediately

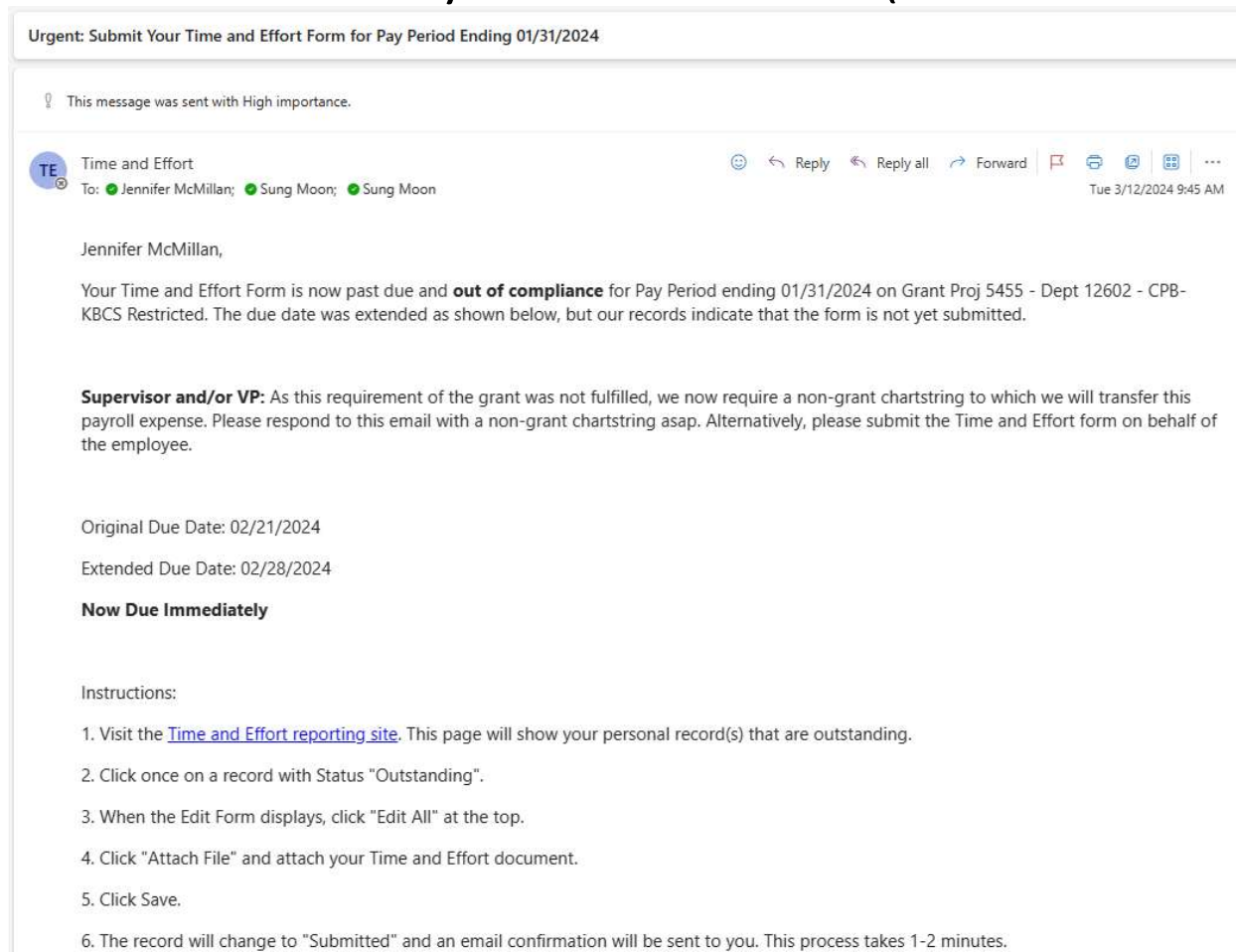
Instructions:

1. Visit the [Time and Effort Reporting site](#). This page will show your personal record(s) that are outstanding.
2. Click once on a record with Status "Outstanding".
3. When the Edit Form displays, click "Edit All" at the top.
4. Click "Attach File" and attach your Time and Effort document.
5. Click Save.
6. The record will change to "Submitted" and an email confirmation will be sent to you. This process takes 1-2 minutes.

Example Timeline



Sample email – Weekly Notification (Past Due – Phase 4)





+ New Promote Page details Immersive Reader Analytics

Welcome to Time and Effort for Grants!

Instructions:

1. Click [My Outstanding T&E's](#)
2. Select an outstanding "card"
3. Click 'Edit All'
4. Click 'Attach File'
5. Locate file and click 'Open'
6. Click 'Save'

After attaching a file, please allow 1-2 minutes for [Time and Effort Reporting Site](#) processing. The Status will update to "Submitted" once processed. Refresh your browser to see updated status.

Employees

My Outstanding T&E's

View all of My T&E's

Supervisors

My Employees' Outstanding T&E's

View all of My Employees' T&E's

Who needs to submit a Time and Effort form?

When do I need to submit a Time and Effort form?

*GL Business Unit

*From Pay Period End Date

*To Pay Period End

EMPLID (or blank for all)

Dept ID (Optional)

Acct Type - E or L (Opt)

Account (% for all, 101%)

Fund (% for all, 14% partial)

Class (% for all, 01% partial)

[View Results](#)



TETracking ★

My Outstanding and Rejected | My Outstanding Tim

① ID	⇌ EMPLID-Proj	👤 EmployeeName	📅 Pay Period End	⇌ EMPLID-Proj: ...	⇌ EMPLID	⇌ Grant	✅ Status	⇌ Employee Email
28	786-5455	Jennifer McMillan	December 31, 2023	Jennifer McMillan		Proj 5455 - Dept 12602 - CPB-KBCS Restricted	Accepted	jennifer.mcmillan@...
29	786-5455	Jennifer McMillan	December 15, 2023	Jennifer McMillan		Proj 5455 - Dept 12602 - CPB-KBCS Restricted	Accepted	jennifer.mcmillan@...
30	786-5455	Jennifer McMillan	November 30, 2023	Jennifer McMillan		Proj 5455 - Dept 12602 - CPB-KBCS Restricted	Accepted	jennifer.mcmillan@...

List: TETracking

Columns	
A column stores information about each item in the list. The following columns are currently available in this list:	
Column (click to edit)	Type
Title	Single line of text
EMPLID-Proj	Lookup
Pay Period End	Date and Time
Status	Choice
Date Submitted	Date and Time
Due Date	Calculated (calculation based on other columns)
Ext Due Date 1	Calculated (calculation based on other columns)
Ext Due Date 2	Calculated (calculation based on other columns)
DateEmail1Sent	Date and Time
EMPLID	Lookup
VP Name	Lookup
Supervisor_Name	Lookup
Supervisor Email	Lookup
EMPLID-Proj: Employee Name	Lookup
Grant	Lookup
VP Email	Lookup
Employee Email	Lookup
Email1Sent	Single line of text
Comments	Multiple lines of text
ProcessBegStat	Single line of text
DateApproved	Date and Time
EmployeeName	Person or Group
Email2LastSent	Date and Time
Email3LastSent	Date and Time
Email4LastSent	Date and Time
Email5LastSent	Date and Time
SupervisorDisplayName	Person or Group
EmployeeNameText	Single line of text
InRejectStatus	Single line of text
EMPLID-Proj:Document Type	Lookup
Modified	Date and Time
Created	Date and Time
Created By	Person or Group
Modified By	Person or Group


Connector: "EMPLID-PROJ"

Columns	
A column stores information about each item in the list. The following columns are currently available in this list:	
Column (click to edit)	Type
EMPLID-Proj	Single line of text
Notes	Multiple lines of text
EMPLID	Single line of text
VP_Name	Single line of text
Employee Type	Single line of text
Supervisor_Name	Single line of text
Supervisor_Email	Single line of text
Employee Name	Single line of text
Grant	Single line of text
VP Email	Single line of text
Employee Email	Single line of text
Document Type	Single line of text
Modified	Date and Time
Created	Date and Time
Created By	Person or Group
Modified By	Person or Group

Power Automate

- **T&E AP0: PowerApps Trigger - Pre-Check Before Release**
 - Validates that the exact name listed as 'Employee Name' and 'Supervisor Name' match to Microsoft 365. This helps avoid email issues.
- **T&E AP1: PowerApps Trigger - Send Email1-Set Status to Outstanding from Null**
 - Finds records where 'Email1Sent' field is blank & Employee Document Type is not Stipend
 - Sends an email to the Employee from the timeandeffort@bellevuecollege.edu address.
 - Updates the 'DateEmail1Sent' field to the current date/time
 - Sets 'Email1Sent' to "Yes"
- **T&E AP2: After Update - T&E-Send Email Confirmation to Employee**
 - After a record is updated, this procedure goes through a series of condition checks and either updates values and/or sends emails.
- **T&E AP3: Daily - Reminder Emails**
 - Send a reminder email daily at 10:35am if the record is in "Outstanding" or "Rejected" status.
- **T&E AP4: Weekly - Very Past Due Reminder Emails**
 - Send a reminder email weekly if the record is in "Outstanding" or "Rejected" status if the record is a certain number of days late.

Admin PowerApp



Time and Effort Administration

[Pre-Check Records](#) [Process New Records](#)

Filter by Status

- Outstanding**
Records not yet submitted
- Submitted**
Records that are ready to approve
- Accepted**
Records that are accepted
- Rejected**
Records that are rejected
- All**
View all Records

Search by Employee Name

Search

4/15/2025	[REDACTED] 15) Proj 10176 - Dept 20601 - PRKS	Outstanding RecordID: 1373
4/15/2025	[REDACTED] 97) Proj 9428 - Dept 21639 - NSF-XR	Outstanding RecordID: 1383
4/15/2025	[REDACTED] 39) Proj 9428 - Dept 21639 - NSF-XR	Outstanding RecordID: 1410
4/15/2025	[REDACTED] 12) Proj 10133 - Dept 21625 - Master	Outstanding RecordID: 1411

Save & Return

Cancel

Employee Name

nski

-5437

EMPLID-Proj

Pay Period End

4/15/2025

Supervisor Name

n

* Status

Accepted

▼

Date Submitted 4/26/2025

Due Date

2025-05-06T07:00:00Z

Ext Due Date 1

2025-05-13T07:00:00Z

Ext Due Date 2

2025-05-20T07:00:00Z

Date Accepted

4/29/2025

Date Email 1 Sent

4/23/2025 12 :55

Last Date Email 2 Sent

4/25/2025

Last Date Email 3 Sent

12/31/2001

Last Date Email 4 Sent

12/31/2001

Last Date Email 5 Sent

12/31/2001

Comments

Attachments

PDF

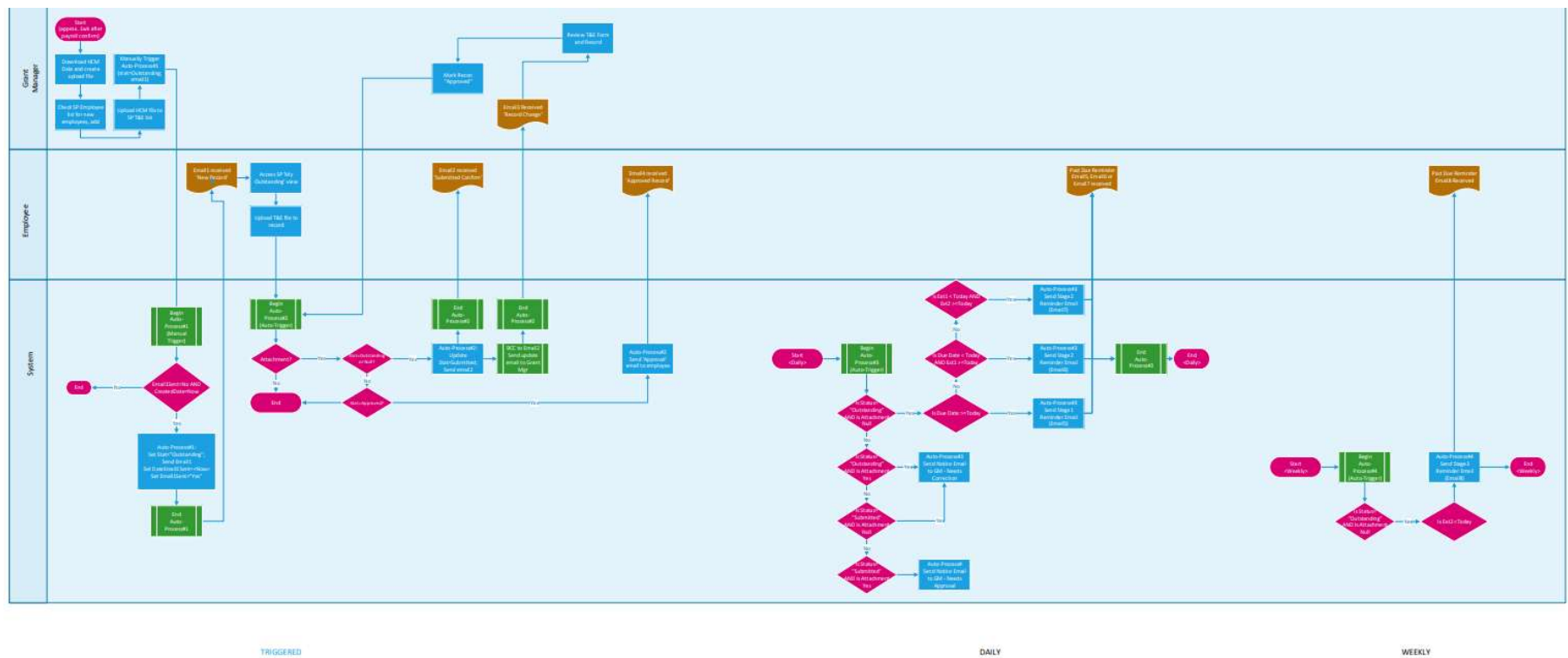
T_E_Apr 01-15 2025.pdf

×

📎 Attach file

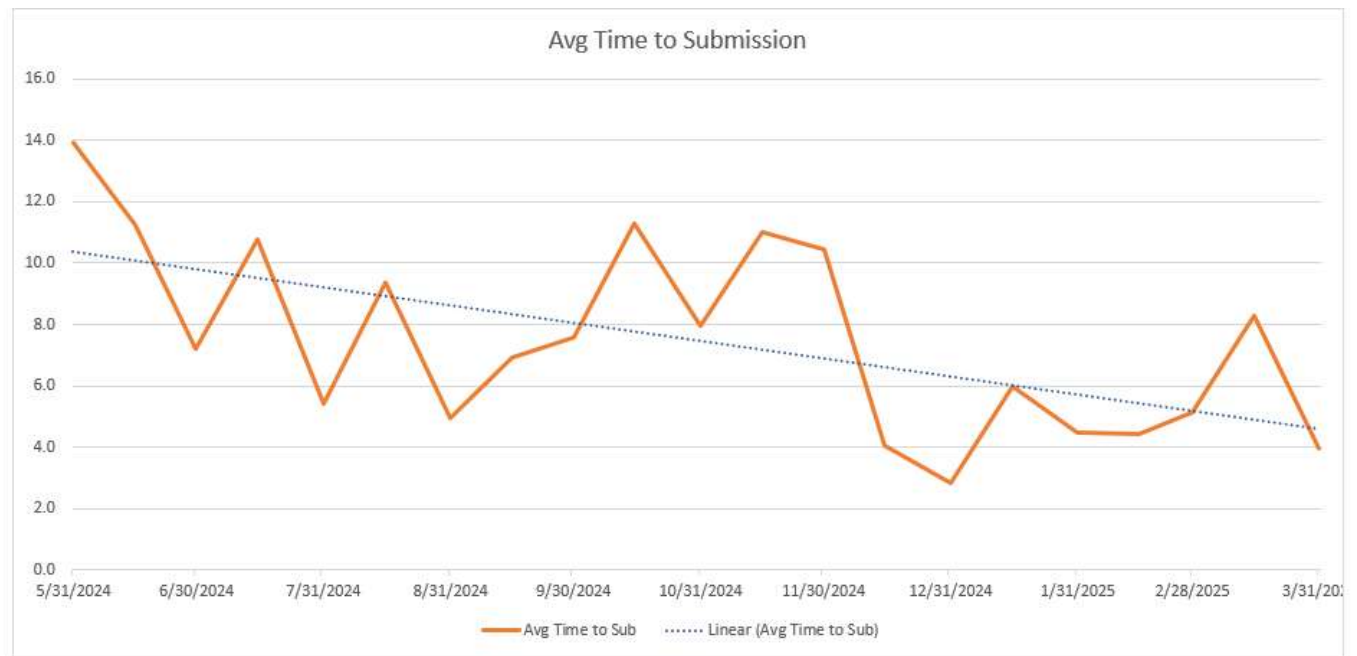
Time and Effort Workflow

[Finance Staff - T&E Workflow.pdf - AllItems](#)



Improvement From Launch to Current

Pay Period	Total Records	Avg Time to Sub
5/31/2024	63	13.9
6/15/2024	58	11.2
6/30/2024	51	7.2
7/15/2024	53	10.8
7/31/2024	55	5.4
8/15/2024	53	9.4
8/31/2024	49	5.0
9/15/2024	47	6.9
9/30/2024	54	7.6
10/15/2024	54	11.3
10/31/2024	55	7.9
11/15/2024	53	11.0
11/30/2024	49	10.4
12/15/2024	51	4.0
12/31/2024	35	2.8
1/15/2025	39	6.0
1/31/2025	39	4.5
2/15/2025	38	4.4
2/28/2025	40	5.1
3/15/2025	41	8.3
3/31/2025	42	3.9



Improvement From Launch to Current

Pay Period End	Days to 99%
5/31/2024	25
6/15/2024	17
6/30/2024	30
7/15/2024	29
7/31/2024	13
8/15/2024	23
8/31/2024	17
9/15/2024	27
9/30/2024	15
10/15/2024	17
10/31/2024	27
11/15/2024	39
11/30/2024	17
12/15/2024	34
12/31/2024	17
1/15/2025	20
1/31/2025	18
2/15/2025	14
2/28/2025	18
3/15/2025	21
3/31/2025	14

