

**Harvard Pilgrim Health Care, Inc.**  
**Harvard Pilgrim Health Care Institute, LLC**  
*Office of Sponsored Programs*

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**TITLE: Training and Guidance on Labor Distribution**

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**PURPOSE:** To advise the research community of the cost transfer policies and procedures

This guidance applies to all Harvard Pilgrim Health Care, Inc. (HPHC) and Harvard Pilgrim Care Institute, LLC (HPHCI) (collectively, HPHC/I) personnel engaged in research, teaching or research administration activities in support of the charitable and educational mission of HPHC, Inc.

Time & Effort certification is mandated by 2 CFR 200 Uniform Guidance and is the documentation of the effort (not salary) that each employee expends on various activities during a specified time period regardless of sponsor and pay.

T&E is based on institutional commitments (research, clinical work, teaching and administrative responsibilities).

Established in the hire letter which indicates the **Institutional Base Salary (IBS)**.

Take into account the clinical, administrative, teaching and other research responsibilities when applying for grants and commitments on other grants

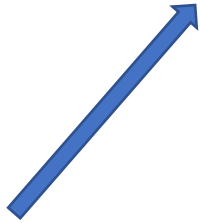
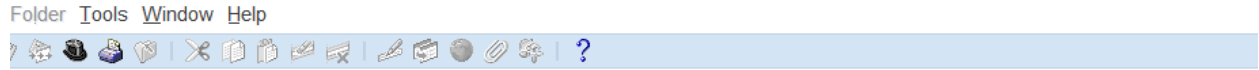
**Oracle Labor Distribution**

**Open Oracle**

**Pick your Responsibility**

**Click on Award**

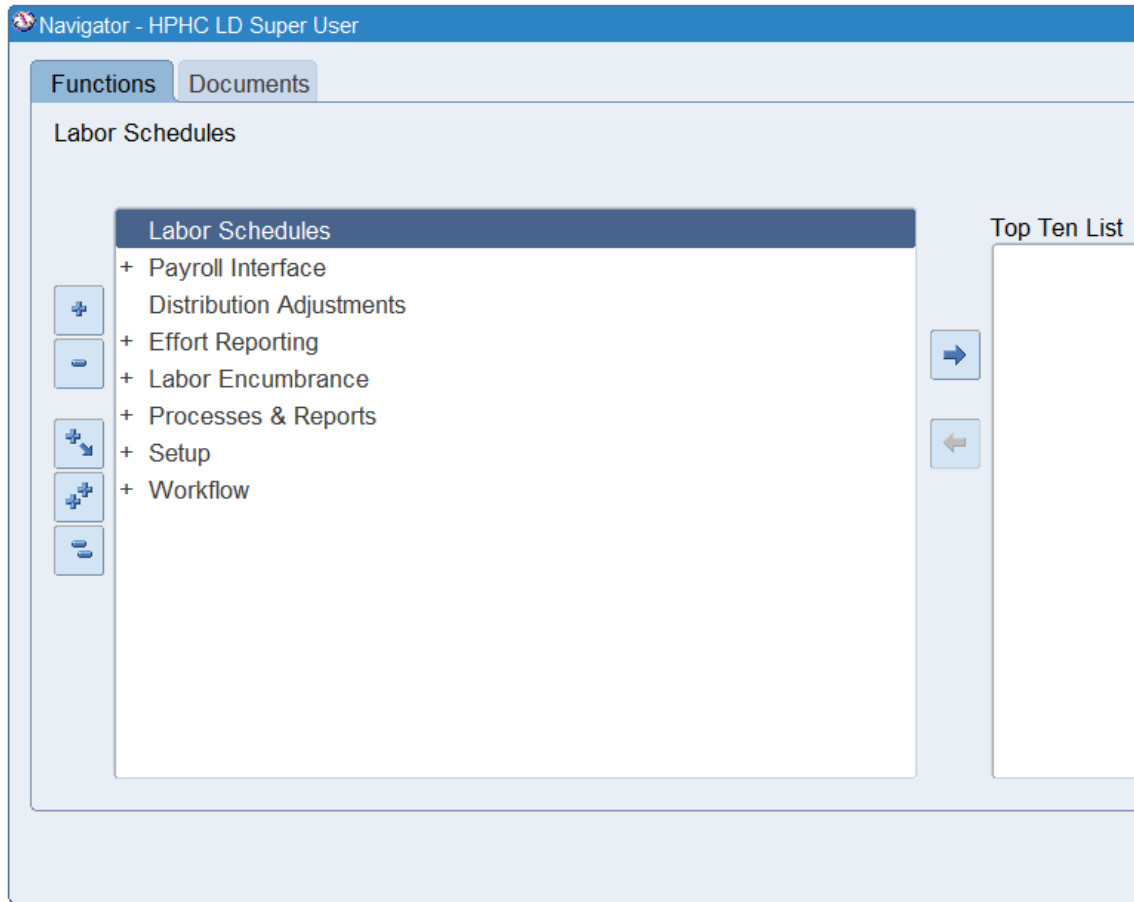
[Type here]



The screenshot displays the "Navigator - HPHC Grants Accounting Superuser" application window. At the top, there are two tabs: "Functions" and "Documents". The main content area is titled "Awards" and contains a sub-section "Enter and Maintain Awards". This section features a list of menu items: "Awards" (highlighted with a dark blue bar), "Projects", "+ Budgets", "+ Expenditures", "+ Billing", "Award Status", "Project Status", "+ Government Reports", "+ Setup", "+ Reports", "+ Workflow", "+ Accounting Inquiries", and "GMS APEX Dashboard". To the left of this list are several small icons, including a plus sign, a minus sign, and a plus sign with a mouse cursor. On the right side of the main content area, there is a "Top Ten List" section containing a numbered list: "1. Invoice Review", "2. Requests: Submit", "3. Expenditure Inquiry", and "4. Award Status". Below this list are two arrow icons, one pointing right and one pointing left.

Click on black top hat

[Type here]



Click on labor schedules

[Type here]

Employee

Full Name

Employee No.

Distribution Instructions

Assignment No.	Job	Position	Begin	End	FTE	Assignment Status	Org. Def.	Element Group
<input type="checkbox"/>							<input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
<input type="checkbox"/>							<input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
<input type="checkbox"/>							<input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
<input type="checkbox"/>							<input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
<input type="checkbox"/>							<input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>

Schedule Lines

Click on F11 key to turn the field Full Name grey

Type in last name with %

Click on Control F11

Employee

Full Name Johnson%

Employee No.

Distribution Instructions

Assignment No.	Job	Position	Begin	End	FTE	Assignment Status	Org. Def.	Element Group
<input type="checkbox"/>							<input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
<input type="checkbox"/>							<input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
<input type="checkbox"/>							<input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
<input type="checkbox"/>							<input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
<input type="checkbox"/>							<input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>

Schedule Lines

[Type here]

The screenshot shows the 'Labor Scheduling' window. At the top, the 'Employee' section has 'Full Name' set to 'Johnson McGrath, Julie Ann' and 'Employee No.' set to '8425'. A blue arrow points to the 'Employee' section. Below this is a table with columns: Assignment No., Job, Position, Begin, End, FTE, Assignment Status, Org. Def., and Element Group. The first row is selected and shows '8425-2', 'DPM Administr', '10/27/2014', and 'Terminate Ass'. To the right of the table is a 'Distribution Instructions' section with checkboxes for 'Org. Def.' and 'Element Group'. At the bottom of the window is a 'Schedule Lines' button.

Assignment No.	Job	Position	Begin	End	FTE	Assignment Status	Org. Def.	Element Group
8425-2	DPM Administr		10/27/2014			Terminate Ass	<input type="checkbox"/>	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
							<input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
							<input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
							<input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
							<input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>

Click on down arrow until the correct name appears

The screenshot shows the 'Labor Scheduling' window. The 'Employee' section now has 'Full Name' set to 'Johnson, Charlotte A' and 'Employee No.' set to '1308'. The table below shows the first row selected with '1308', 'Dir Office of Sp', '03/21/1988', and 'Active Assignn'. The 'Distribution Instructions' section and 'Schedule Lines' button are also visible.

Assignment No.	Job	Position	Begin	End	FTE	Assignment Status	Org. Def.	Element Group
1308	Dir Office of Sp		03/21/1988			Active Assignn	<input type="checkbox"/>	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
							<input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
							<input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
							<input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
							<input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>

Click on Schedule lines

[Type here]

**Employee**

Full Name: Johnson, Charlotte A  
Employee No.: 1308

**Assignment**

Assignment: 1308      FTE:   
Org.: 999 Harvard Pilgrim He      Payroll: Bi-Week  
Begin: 03/21/1988      End:   
Status: Active Assignment

**Schedule Hierarchy**

Assignment      Copy To  
 Element Group  
 Element Type

Project	Task	Start Date	End Date	%
PS OSP 2022	1	01/01/2022	12/31/2022	100
PS OSP - 2021	1	01/24/2021	12/31/2021	100
PS OSP - 2020	1	01/01/2020	12/31/2020	100
PS OSP 2019	1	01/01/2019	12/31/2019	100

Default Account:      
Totals:

Refresh Display      Schedule Summary      Monthly Summary      Payroll Period

INSERT

Project #

Task #

Award #

Organization

Expenditure Type (in most cases it will be Professional Semi Admin)

[Type here]

**Employee**  
Full Name: Johnson, Charlotte A  
Employee No.: 1308

**Assignment**  
Assignment: 1308 FTE:   
Org.: 999 Harvard Pilgrim He Payroll: Bi-Week  
Begin: 03/21/1988 End:   
Status: Active Assignment

**Schedule Hierarchy**  
 Assignment   
 Element Group   
 Element Type

Organization	Exp. Type	Start Date	End Date	%
Harvard Pilgrim He	Exec Dir Mgr Semi Adm	01/01/2022	12/31/2022	100
Harvard Pilgrim He	Exec Dir Mgr Semi Adm	01/24/2021	12/31/2021	100
Harvard Pilgrim He	Exec Dir Mgr Semi Adm	01/01/2020	12/31/2020	100
Harvard Pilgrim He	Exec Dir Mgr Semi Adm	01/01/2019	12/31/2019	100

Default Account:      
Totals:

Buttons: Refresh Display, Schedule Summary, Monthly Summary, Payroll Period, Open

Start date

End date – system will automatically take the schedule out to the end date of the project so make sure that the end date is when the person is scheduled to stop work on that project.

Add the %FTE the person is scheduled. Save

**REVISION HISTORY:**

<b>Department:</b> OSP	<b>Title:</b> Training and Guidance on Labor Distribution
<b>Effective Date:</b> 2/1/2022	<b>Owner:</b> OSP
<b>Reviewed By/On:</b>	
<b>References:</b>	
<b>Approved By:</b> <i>Charlotte A. Johnson</i>	