# *After the Fact Activity Report (ATFAR)*

Last Revised: New 10/06/08

# 1.0 Purpose

The purpose is to establish written work instructions for processing After the Fact Activity Reports (ATFAR). These reports will confirm that the distribution of activity represents a reasonable estimate of the work performed by the employee during the specified period.

# 2.0 Responsibility

It is the responsibility of all DoR personnel to use this work instruction as a guideline in the After the Fact Activity Report process.

# 3.0 Definitions

None

# 4.0 Procedure

## 4.1 Personnel Activity Listing

A "Personnel Activity Listing" must be run for the specified period within thirty days of the close of that period. The ATFAR periods are

| | |
|---|---|
| Spring Semester: | 01/16 – 05/31 |
| Summer Semester: | 06/01 – 08/31 |
| Fall Semester: | 09/01 – 01/15 |

The steps for running the listing are as follows:

- Go to, Process financial Information, Perform Allocations, Report, Run ATFAR, Update Display.
- In run control ID type ATFAR, Click ok.
- Put in dates for the period you are running, leave EMPLID blank, uncheck print ATFAR-Signature from box (print personnel activity listing should be checked)

- Up at top on the tool bar hit the first traffic light to print, a process schedule request box will appear, click ok, report will print to the Xerox machine.

## 4.2 Payroll Query

For every 375, 378, 393, 394, account on the “Personnel Activity Listing” a payroll query needs to be run. Due to security issues associated with payroll information, access to this information can only be received via the Grant & Contract Administrator and he/she will log you into the system.

- Enter the EMPLID and the dates for period, click review results, verify it is for the correct employee and designated period, print.

## 4.3 ATFAR Personnel Activity Report and Signature Page

At this point an individual ATFAR Personnel Activity Report and Signature Page will need to be run for each employee. This may be done from any DoR staff computer. This is completed as follows:

- Go to Go, Process Financial Information, Perform Allocations, Report, Run ATFAR, Update display
- In run control ID type ATFAR and click ok
- Enter dates for period, enter EMPLID, tab, verify name corresponds to name on payroll query
- ATFAR Signature Form and Print Personnel Activity Listing have to be run separately. You must run one, then exit out and go back in to run the other. You must also check the box for Email Report.
- Up at top on the tool bar hit the first traffic light to print, a process schedule request box comes up, click ok, report will print to the Xerox machine.

## 4.4 Verifying and Accounting for Reallocations

The payroll for each employee will need to be verified to make sure it is correct. Sometimes reallocations have been processed outside the ATFAR period, so it will have to be put into PeopleSoft to adjust the payroll. You will need to enter these in PeopleSoft as follows:

- Go to Go, Process Financial Information, Perform Allocations, Use, ATFAR Payroll Allocation, Add or Update (update will be used whenever an employee has been previously entered), Enter EMPLID listed on the reallocation, hit tab, the Department will automatically fill in, click ok.
- The perform allocation box will come up, the date is the pay period date listed on the reallocation, and the amount listed will be a positive number for the new account to be charged. You will then enter a second line to take it out of the current account charged using the amount as a negative number, click save. This needs to be done for each separate item on the reallocation.
- Other items we use to verify payroll are:
    - Payroll ledger (located in Grant & Contract Administrator’s office),
    - Graduate student appointments,
    - Cost sharing information located in award files and in Nvision under object code 2981,
    - Faculty files (located in the Award Administrator’s office),

- Salary Recovery (located in the Grant & Contract Administrator's office)

### 4.5 Mailing ATFARs

Once the payroll and percentages are verified, they are ready for mailing. The cover letter for the reports is in S:/Departments/Research/Admin/ATFAR/newmemo. Make changes to memo that need to be done such as dates, your name etc. Make a copy of each ATFAR you send out.

- **The signature page is the only page besides the cover letter that is mailed.** Distribute as follows:
  - ATFARS for faculty-Send to the Division Head or Department Chair for signature.
  - ATFARS for Research Assistants, Research Associates and other salaried Personnel-Send to PI of each 375, 378, 394, 395 accounts.
  - ATFARS for Department Chair-Send to Dean of School
- As per the memo instructions the ATFARs should be signed and returned to the DoR within 2 weeks.
- If you are missing reports after 2 weeks a second memo will need to be sent S://Departments/Research/Admin/ATFAR/latememo.
  **At this point please CC the faculty member's chair on this copy.**
- If still no response within 2 additional weeks a third memo will need to be sent which is in S://Departments/Research/Admin/ATFAR/third .
  **At this point please CC the faculty member's chair and dean on this copy.**

### 4.6 Filing ATFARs

Once the faculty members have returned the signed ATFARs they need to be filed in the appropriate ATFAR binder. Steps to follow when filing the ATFARs are as follows:

- Verify they have been signed.
- Check them off the Personnel Activity Listing
- Staple the ATFAR Personnel Activity Report, Payroll Query, and any supporting documentation to the Signature page
- File in the appropriate binder by Department and Employee number.

# 5.0 References

None

# 6.0 Approvals

Prepared By: Billijo Goodfellow Date: 10/6/08

Prepared By: ______________________ Date: ____________

Approved By: ______________________ Date: 6 Oct 08
**Director of Research & Technology**

Approved By: Constance M. Ferguson Date: 10/6/08
**Grant & Contract Administrator**

Approved By: Todd Stevens Date: 10/06/08
**Award Administrator**

Approved By: K. Klett Date: 10/06/08
**Research Compliance Office**

## Revision History

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**10/06/08** **Work instruction established**