

### Monthly Time and Effort Certification

Reporting Period:   Department:

Employee Name:  Employee ID:

Is the individual named above considered "Professional Staff"? (Physicians, research associates, and other personnel performing work at responsible levels who are credentialed via license(s) and/or degree(s)). Check "yes" or "no" below:

- YES  Complete Page 1. *Page 2 is optional.*  
 NO  Complete Page 2, a tracking spreadsheet of actual hours worked.  
*Please attach T&E Tracking Report to Monthly T&E Certification.*

**INSTRUCTIONS:** Please complete all green shaded areas if you are subject to Policy 400.725

OTHER TYPES OF EFFORT			Percent Effort
Patient Care			
Instruction & Training			
Other Hospital Activities			
ORGANIZED RESEARCH			Percent Effort
Project	IRBNET #	Short Title	Percent Effort
1			
2			
3			
4			
5			
6			
7			
8			
9			
10			
11			
12			
13			
14			
15			
16			
17			
18			
19			
20			
21			
22			
23			
24			
25			
26			
27			
28			
29			
30			
<b>TOTAL</b>			<b>0.00%</b>

By submitting this Time & Effort report, I certify that the percent of effort stated above reasonably reflects the effort expended in the reporting period. Additionally, I certify that I have first-hand knowledge or a suitable means to verify the effort reported on this Time & Effort Report.

Signature: \_\_\_\_\_ Date: \_\_\_\_\_ Reviewer Initials: \_\_\_\_\_

Submit this report within 10 days of the end of the reporting period.  
 Email a completed copy of this T&E certification and tracking report (if required) to Department Administration.  
 Responsible Dept Admin will submit to [CFD-S.Research.Finance@AdventHealth.com](mailto:CFD-S.Research.Finance@AdventHealth.com).



**Instructions for completing AdventHealth  
Monthly Time & Effort Reports**

**Before you begin, please note:**

- Only edit the **green, shaded cells** on the template.
- Carefully transpose** the IRBNet# and Study Short Title into the **green, shaded cells** on Page 2 Tracking from the running project list available here:  
H:\tri\TRI\_SHARED\ADMINISTRATION\EFFORT\_REPORTING\IRBNet  
OR  
https://dynamicview.smartsheet.com/views/f290eac2-7aa1-40d9-b59d-ab5965871258  
Time and Effort Certifications are to be **completed and submitted by the 10th day of the month** following the reporting period (e.g. a February report is due on March 10th). *If the deadline falls on a weekend or holiday, the report is due on the following business day.*

**Steps:**

- Start with a new, blank template for each month. Save the excel file using the following standard nomenclature:  
**YY\_MM\_LastName\_FirstName\_T-E ver XX.XX.XX** (the version number at the end of the file title may change month to month)  
For example, a January 2024 report would be saved in the 2024 Efforts Reports/01\_2024 folder as:  
24\_01\_McDonald\_Ronald\_T-E ver XX.XX.XX
- Complete **Page 1: Certification & Page 2: Tracking (if applicable)** following the detailed **instructions below**.
- Optional:** Once all pages are completed, submit to your supervisor for review. Supervisors should review and provide final files to the appropriate department administrative team member for processing by the 10th day of the month following the reporting period.
- Department Administration** must notify CFD-S.Research.Finance@AdventHealth.com when all files are ready for processing.

**Page 1: Certification**  
Complete all fields as follows:

Field Name	Instructions
Month	Select Reporting Period Month
Year	Select Reporting Period Year
Employee Name	Select Employee Name
Employee ID	Employee's unique AdventHealth identification number (found on paystub) will autopopulate. If your EID does not populate, please contact Department Administration.
Professional Staff?	Mark (X) either Yes or No.
If Yes	You do not need to complete Page 2. You can report reasonable percent effort for each category (Patient Care, Instruction & Training, Other Hospital Activities and Organized Research). <i>However, a department may require completion of Page 2 regardless of how you answered.</i>
Percent Effort	Report the percent effort that reasonably reflects the effort expended by employee during the reporting period. <i>This can be manually entered or automatically populated from Page 2.</i>
Patient Care	Means those departments ("cost centers") which render routine standard of care or ancillary hospital services to in-patients and/or outpatients. <b>This does not apply to most research staff.</b>
Instruction & Training	Means the formal or informal programs of educating and training technical and professional health service personnel. This category should <u>not</u> be used to capture study-specific training. Examples: 1) attending compliance training; 2) P&P (SOP) training, 3) attending professional career development conferences, etc.
Other Hospital Activities	Means all organized activities of a hospital not immediately related to the patient care, research, and instructional and training functions which produce identifiable revenue from the performance of these activities. <i>General Administration falls under this category or anything that can't be tied to a particular study.</i> Examples: 1) attending staff/core/committee meetings; 2) writing SOPs; 3) team buildings, etc.
Organized Research	Means all research activities of a hospital that may be identified whether the support for such research is from a federal, non-federal or internal source. <i>Effort reporting is a requirement for organized research supported by federal dollars such as NIH grants.</i>
IRBNet #	Department will keep a list of studies on the H-drive and Smartsheet for your reference. For Organized Research, use the reference list to <b>carefully transpose</b> the unique # assigned to an IRB-approved study or a grant award where effort was expended during the reporting period. <b>Only list the first six or seven digits before any dash marks.</b> <i>If the list is missing a study or you need clarification/guidance on the allocation of an activity, please contact Department Administration.</i>
Short Title	Department will keep a list of studies on the H-drive and Smartsheet for your reference. For Organized Research, use the reference list to <b>carefully transpose</b> the Short Title tied to the IRBNet #. This may be the internal or departmental key words used by each department. <i>If the list is missing a study or you need clarification/guidance on the allocation of an activity, please contact Department Administration.</i>
If No	Complete <b>Page 2: Tracking</b> . Page 1 fields will automatically populate from information provided in Page 2.

**Page 2: Hourly Tracking**  
Complete All Fields as follows:

Field Name	Instructions
Employee Name	This field will automatically populate from Page 1
Month	This field will automatically populate from Page 1
Year	This field will automatically populate from Page 1
Organized Research	Means all research activities of a hospital that may be identified whether the support for such research is from a federal, non-federal or internal source. <i>Effort reporting is a requirement for organized research supported by federal dollars such as NIH grants.</i>
IRBNet #	Department will keep a list of studies on the H-drive and Smartsheet for your reference. For Organized Research, use the reference list to <b>carefully transpose</b> the unique # assigned to an IRB-approved study or a grant award where effort was expended during the reporting period. <b>Only list the first six or seven digits before any dash marks.</b> <i>If the list is missing a study or you need clarification/guidance on the allocation of an activity, please contact Portfolio Management.</i>
Short Title	Department will keep a list of studies on the H-drive and Smartsheet for your reference. For Organized Research, use the reference list to <b>carefully transpose</b> the Short Title tied to the IRBNet #. This may be the internal or departmental key words used by each department. <i>If the list is missing a study or you need clarification/guidance on the allocation of an activity, please contact Department Administration.</i>
Patient Care	Means those departments ("cost centers") which render routine standard of care or ancillary hospital services to in-patients and/or outpatients. <b>This does not apply to most research staff.</b>
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1 - 31	Each number is the day in each month. Type the <b>total</b> amount of hours spent on a particular study or category during <b>each day of the month</b> . Total percent effort will calculate automatically.  For example for a typical 8-hr day: Day 1: Study 1 = 4 (hrs); Study 2 = 0.5 (hrs); Instruction & Training = 1.5 (hrs); Other Hospital Activities = 2 (hrs).
<b>If you need extra rows for Organized Research, please contact Department Administration.</b>	
Total % Effort in Cell G75 (Page 1) and Cell AO90 (Page 2) <b>MUST ALWAYS</b> equal 100%. If they do not equal 100%, please contact Department Administration.	

