Gifts
Tammy Bage
&
Christy Jurney

New AgriLife Webpage

http://agrilifeas.tamu.edu/fiscal/reporting/

New Gift Agreement Forms
- Located on the website
- Can be completed online
- Reduced to a one page form
- No longer need an AG-100 form
Letter from Donor vs. Gift Agreement

- If a donor wishes to send in a letter rather than complete an AgriLife Gift Agreement form the letter must include:
  - Wording “The donor agrees and understands that no deliverables, requirements, and restrictions exist for these funds.”
  - Department Head signature prior to sending in to the Reporting Office

How/When to Submit Forms

- Can be submitted by either:
  - Mailing the signed form in with the donor’s check to Cash Management (preferred)
  - Mailing the signed form to the Reporting Office:
    - Tammy Bage – Research
    - Etta Watson – Extension
  - Placing the signed form into Laserfiche folder titled “Work in Progress-Reporting and Gifts”

Types of Gifts

- Restricted Gift (AG-101)
  - Use if the donor wishes to specify an additional purpose, other than the general furtherance of research or extension education programs
- Unrestricted Gift (AG-102)
  - Most gifts are considered an unrestricted gift
  - Honorariums would be considered an Unrestricted Gift. Please check the Honorarium box on the form
- Non-Cash Gift (AG-103)
Whose Signatures are Required

- **Department Head** – obtained by the Department
- **Donor** – obtained by the Department
- **Agency Director** – obtained by Reporting Office

Special Processes

- **3rd Party Cost Share**
  - Follow the gift process and forms
  - Department is responsible for letting Reporting Office know that the monies are for Cost Share on a sponsored project
  - Reporting Office will notify SRS via email and will copy the Department

Special Processes

- **Payment of postage by county offices**
  - Follow the gift process and forms

- **Travel reimbursement payment**
  - If payment is a smaller or the exact amount of travel expenses, do not follow the gift process and forms
  - Complete a Deduction from Expenses form (DFE), AG-511, and submit to Cash Management to process directly against expenses
  - If payment is larger than the amount of travel expenses, follow the gift process and forms. The forms must be signed by the organization or individual that is providing the monies
Reasons why a check will NOT be placed into the Department Account Immediately

- Form is **not** signed by both the Department Head **AND** Donor
- Form **does not** include a departmental gift account
  - Cannot place gifts into non-gift accounts (e.g., Workshop accounts)
- Form **does not** include the Donor’s Address
- Information provided has wording indicating the monies are for a grant vs. a gift
- An Agrilife Employee has signed as the Donor (only allow for honorariums)
- Form is not legible

Questions?

Time & Effort Reporting
Tammy Bagu
&
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New AgriLife Webpage

- [http://agrilifeas.tamu.edu/fiscal/reporting/](http://agrilifeas.tamu.edu/fiscal/reporting/)

What is Time & Effort Reporting?

Certification that salaries and wages that are charged to sponsored projects are reasonable and reflect actual work performed

Does Everyone have to certify time and effort?

- No
- Only if a person has been paid from an account that has been flagged in FAMIS with a “Y” in the TE Certify field (screen 9 or 51)
  - All federally sponsored projects
  - Some non-federal (state & private) sponsored projects
  - The sponsored project agreement should detail this requirement
Can I certify my own time and effort?
- Principal Investigators (PIs) and other faculty-equivalent employees can certify their own effort
- Generally, supervisors certify effort for employees who are not PIs
- Certification should be made by someone with direct knowledge of the employee’s work

How often do I Certify?
- 2 times a year
- Reporting Periods:
  - January to June – Certify in July/August
  - July to December – Certify in January/February
  - Have 45 days to certify prior to non-compliance with TAMUS Policy 15.01.01

How do I Certify?
- Using Single Sign On – SSO
- Time and Effort menu
- https://sso.tamus.edu
Why do I receive emails?

- A person will receive reminder emails for all documents that are open to be certified...
- NO MATTER HOW OLD THE DOCUMENTS ARE

How do I get the emails to stop?

- Certify ALL documents within your Single Sign On (SSO) inbox

What if I Leave/Retire from AgriLife?

- You will still receive emails but you will not be able to access the Single Sign On (SSO) system
- Please check Single Sign On (SSO) prior to departure to ensure all documents have been certified that are in your inbox
- Once a person has departed, a department has two options:
  - Print out the documents to be certified and have the departed employee sign the document. Then upload the signed document into the employee’s inbox and have the department head certify the document within the Time and Effort System
  - Reassign the certification duty to another supervisor/employee that has direct knowledge of the employee’s work
What if I have a problem or disagree with a document's details?

**PRIOR TO REJECTING a DOCUMENT…**
- Contact the responsible department for assistance
- OR
  - Contact:
    - Tammy Bage – Research
    - Christy Jurney - Extension

Can a Department review the documents prior to certification?

- **YES**
  - Please notify Tammy Bage or Christy Jurney to implement this setting for your department
  - **NOTE:** This adds a layer of approval to ALL department time and effort documents... All documents have to be indicated within Single Sign On (SSO) by the Department that it has been verified prior to the documents being made available for certification to certifiers

Reports available to Departments

- Departments can check the status of ALL documents created for Time and Effort reporting within the Single Sign On (SSO) system
Access to the Time & Effort System

- AG-122: For Unit Administrator Access
- All time and effort certifiers should automatically be set up with access in Single Sign On (SSO)

Questions?

AgriLife Reporting Office

**Research**
- Terry Martin – Manager
  - Terry.Martin@ag.tamu.edu
  - 979-845-4760
  - AGSV-521
- Tammy Bage
  - Tammy.Bage@ag.tamu.edu
  - 979-845-5801
  - AGSV-528

**Extension**
- Christy Jurney – Manager
  - Christy.Jurney@ag.tamu.edu
  - 979-862-1502
  - AGSV-529
- Etta Watson
  - Etta.Watson@ag.tamu.edu
  - 979-458-0101
  - AGSV-525