



## Business Process for Professional Employment Organizations (PEOs) – Attestation of Contract Employees on Federal Awards

### Overview

This document outlines the business process for the attestation of expenses for contract employees paid via a Professional Employment Organization (PEO) on federal awards. These contract employees are hired by the PEO and not employees of Harvard and typically reside in a state that Harvard University is not registered, or they are international.

### Business Process

#### Proposal Preparation

When developing a proposal, costs for PEOs should be budgeted as “Other Services” not as personnel costs.

#### Receiving and distributing the Attestation Statements

1. PEO reports have been built in BI Publisher and will be distributed quarterly to identified School Reps via email.
  - a. PEOs were built pulling object code 8221 on federal awards or object code 7980 for Harvard Global (International)
2. School reps will distribute the attestation statements to the department/Unit responsible for managing the award.
3. The PI will review the expenses for accuracy and sign the attestation statement(s).
  - a. **Note:** DZConnex/YoH provides a 1% credit for each line item charged.
4. The local unit is responsible for uploading the signed statement(s) in GMAS\* in line with **quarterly** effort cert dates (see GMAS steps below)
5. Once these are signed, if the charge needs to be moved to another federal award, they need an approved CT to move charges on to the federal award, please refer to the [Cost Transfer Policy](#).

#### Timeline of Quarterly Release

1. The BI Publisher Reports will follow the [ecrt quarterly attestation dates](#).

#### Storage/Retention

Signed attestation statements will need to be uploaded to GMAS to the applicable award. Please tag the document as a PEO, please reference **Appendix A** to learn how to tag a document in GMAS



## Ongoing Monitoring of PEOs

The Financial Compliance Working Group will be responsible for annual monitoring of PEOs to ensure they are signed and uploaded to GMAS.

## Journals

When journaling expenses for PEOs (object code 8221 or 7980) please remember to debit/credit the 1% credit that accompanies the debit.

- If you are crediting a federal award, you must also debit the 1% credit
- If you are debiting a federal award, you must also journal the 1% credit

## Resources

- [PEO Salary Attestation \(University-wide\) in the Harvard Training Portal](#)



## APPENDIX A Tagging Documents in GMAS

### To set the category while uploading documents

- From the segment homepage, select “Documents” and “Segment repository”

The screenshot shows the Harvard GMAS interface for Segment 1. At the top, there is a navigation bar with 'Harvard GMAS', a search bar, and buttons for 'Advanced', 'People', 'Organizations', 'Links', and 'Jess Perreault'. Below this, there are several blurred document cards. The main content area is titled 'Segment 1' and includes a 'Documents' button (highlighted with a red box), 'History', 'Comments (0)', 'Related links', and an 'Actions' button. A dropdown menu for 'Documents' is open, showing 'Segment repository' (highlighted with a red box) and 'All documents'. On the left, there are statistics for 'Action memos' (13) and 'Requests' (3). On the right, there is a 'Key information' section with checkmarks for 'Biohazards/rDNA' and 'International'.

- From the segment repository, select “Actions” and “Upload documents”

The screenshot shows the 'Documents' page for Segment 01. At the top, there is a 'Documents' header, 'Segment 01', 'Related links', and an 'Actions' button (highlighted with a red box). Below the header, there is a green informational box stating: 'Bulk delete, Bulk lock, Bulk unlock, and Bulk move are all new options in the dropdown Actions menu. Each action will open a new window where the selected action can be performed will appear.' Below this is a table with columns: Name, Category, Size, Uploaded by, and Uploaded. The table lists several documents, including 'Open Access Policy (2)', '11 Progress Report (5)', 'TRAIN (1) (100)', and 'Training Plan - Blank (1) (100)'. A dropdown menu for 'Actions' is open, showing options: 'Download all', 'Add folder', 'Upload documents' (highlighted with a red box), 'Get from clipboard', 'Lock documents', 'Unlock documents', 'Move documents', and 'Delete documents'.

- Once the document is selected to upload, to the right of the document select “Add description or category” and then select “PEO – Professional Employment Org” from the category dropdown. When “Done” is selected the documents will be uploaded and the categories will be applied.



**Documents** Segment 01 Related links Actions

Bulk delete, Bulk upload documents where

**3 files selected for upload**

Choose files Drop files here

Document 2.docx	Uploaded	Add description or category
Document 1.docx	Uploaded	Add description or category
Document 3.docx	Uploaded	Add description or category

Enter description

Select a category

Select a category

PEO - Professional Employment Org

Cancel Done



**To set the category for a document that has already been uploaded**

1. From the segment repository, select the gear icon to the right of the document and then select “Add category”

**Documents** Related links Actions  
Segment 01

**i** Bulk delete, Bulk lock, Bulk unlock, and Bulk move are all new options in the dropdown Actions menu. Each action will open a modal where only the documents where the selected action can be performed will appear. [Don't show this message again](#)

Name	Category	Size	Uploaded by	Uploaded date
Open Access Policy (2)				
F1 Progress Report (2)				
Document 1.docx		71.2 KB	Jess Perreault	Oct 4, 2022 10:40 AM
Document 2.docx		71.3 KB	Jess Perreault	Oct 4, 2022 10:40 AM
Document 3.docx	PEO - Professional Employment Org	71.2 KB	Jess Perreault	Oct 4, 2022 10:40 AM
TRAIN (1).org		40.9 KB	Jess Perreault	Oct 4, 2022 10:40 AM
Training Plan - Blank (1).xlsx	PEO - Professional Employment Org	12.4 KB	Jess Perreault	Oct 4, 2022 10:40 AM
Welcome Week Agenda - Template (2).docx	PEO - Professional Employment Org	19.3 KB	Jess Perreault	Oct 4, 2022 10:40 AM
F1 (EXT) ASAP-BOE282 Inquiries PE- progress report (1)		19.3 KB	Sabrina Garcia	Sep 29, 2022 10:40 AM

2. From the dropdown menu that appears in the category column, select “PEO-Professional Employment Org” and then select “Done”

**Documents** Related links Actions  
Segment 01

**i** Bulk delete, Bulk lock, Bulk unlock, and Bulk move are all new options in the dropdown Actions menu. Each action will open a modal where only the documents where the selected action can be performed will appear. [Don't show this message again](#)

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**To remove the category for a document that has been incorrectly set**

1. From the segment repository, select the gear icon to the right of the document and then select “Remove category”

**Documents** Related links Actions

Segment 01

✕ Don't show this message again

Name	Category	Size	Uploaded by	Uploaded date	
Open Access Policy (2)					
Y1 Progress Report (1)					
Document 1.docx	PEO - Professional Employment Org	71.2 KB	Jess Perreault	Oct 4, 2022 10:40 AM	
<a href="#">Document 2.docx</a>		71.3 KB	Jess Perreault	Oct	<ul style="list-style-type: none"> <li>Move</li> </ul>
Document 3.docx	PEO - Professional Employment Org	71.2 KB	Jess Perreault	Oct	<ul style="list-style-type: none"> <li>Delete</li> </ul>
TRAM (1).png		67.6 KB	Jess Perreault	Oct	<ul style="list-style-type: none"> <li>Lock</li> </ul>
Training Plan - Blank (1).xlsx	PEO - Professional Employment Org	12.4 KB	Jess Perreault	Oct	<ul style="list-style-type: none"> <li>Rename</li> </ul>
Welcome Week Agenda - Template (3).docx	PEO - Professional Employment Org	18.3 KB	Jess Perreault	Oct	<ul style="list-style-type: none"> <li>Edit description</li> </ul>
Pw: [EXT] AGAP-000000 Inquiries RC: progress reports		15.3 KB	Sabrina Garcia	Sep	<ul style="list-style-type: none"> <li>Remove category</li> </ul>