

PPD Charging Practices

Can an activity* be identified that either: **Directly benefits** from the time worked? -or- **Is the cause** of the time worked?
 If yes, then that activity is where the effort should be charged. If no, use the following guidelines.

Definitions

Direct charge - Charge to the project, program, or activity that supports, benefits, or causes the work.
Burden pool - Charge to the predominant indirect pool for your Division. For Programmatic divisions, this is Program Support.
Primary Effort - The activity* the employee is dedicated to. For more help identifying primary effort, see the "What is my Primary Effort?" tab.

Reviews

Type of effort	Where to charge	Notes and Examples
Internal PPD Specific Reviews	40PD_40PD.00.04_Intrnl PPD Spec Rvws	Serving as a reviewer on internal reviews specifically related to PPD-hosted activities and projects. Includes projects such as: HL LHC Det. Upgrade, Mu2e, SCDMS, ADMX, CMB-S4. Not to be used for M&S or travel costs.
Internal non-PPD Reviews	40PD_40PD.00.05_Intrnl non-PPD Rvws	Serving as a reviewer on internal reviews for non-PPD-hosted projects, programs, experiments or operations. Such as: LBNF, PIP-II, LCLS II, HL LHC AUP, ND, and SBN. Not to be used for M&S or travel costs.
External Reviews	40PD_40PD.00.06_External Reviews	Serving as a reviewer on external reviews on non-Fermilab projects or committees. Includes activities such as serving on DOE comparative review panels, DOE-wide ECA reviews, reviews of SBIR proposals, etc. Travel allowed. Should not be used for white papers related to your B&R.
Engineering Design Reviews	Direct charge where the related engineering labor was charged	Serving as a reviewer for on engineering design reviews for projects, programs, or other activities.
Prep for Reviews (you are being reviewed)	Direct charge	Preparation to be reviewed by DOE or internal reviews of Fermilab projects/programs/activities. Includes prep for comparative reviews of your B&R.
Labwide Committees & Working Groups	40PD_40PD.00.03_Lab Committee & Grps	Serving on labwide committees such as LDRD, Wilson and Lederman Fellows, EAG, and standing ES&H committees. Also includes working groups or user testing to benefit labwide initiatives such as BPS, climate survey improvements, and WH space planning. <u>Excludes</u> programs led by or coordinated with the Office of EDI or EPE. Not to be used for M&S or travel costs.

EDI and EPE

Type of effort	Where to charge	Notes and Examples
Equity, Diversity, and Inclusion (EDI)**	40PD_40PD.00.20_PPD EDI**	Existing EDI Office programs including: EDI task force, LRGs, Inclusion Matters. Must be coordinated with Central Office. See EDI website for a complete list. ** Not to be used for M&S or travel costs.
Education and Public Engagement (EPE)**	40PD_40PD.00.19_PPD EPE**	Existing EPE Office programs including: Open house, Saturday Morning Physics, Ask-a-Scientist, educational engagement. Must be coordinated with Central Office. See EPE website for a complete list. ** Not to be used for M&S or travel costs.

Training

Type of effort	Where to charge	Notes and Examples
General Training	Primary Effort	General training requirements/courses common across the lab and included on ITNA training plan. Includes all safety training offered labwide such as: CPR, GERT, radworker, crane, LOTO, forklift, electrical, tech shop, etc. Includes labwide licensed general software training such as: Office, Windows, MacOS, Unix. Includes "Stepping up" training for non-managers.
Management-specific training	40PD_40PD.00.02_PPD Mgmt & Suprvsn	General management & supervision courses such as: Fermilab functions, Interaction Management, Managing Within the Law, etc. Must either have direct reports or be listed on the org chart as Assistant Division Head, Department Head, Deputy Department Head, or Associate Department Head.
Job specific training	Direct charge. If a direct charge cannot be identified, then use Primary Effort.	Job specific training, including on-the-job training, targeted training and professional development. Includes training such as: experiment DAQ operation or analysis software, engineering design software, cryogenic controls, scintillator extrusion and testing, and GD&T spatial analyzer. Also, training in the operation of specific machines such as: component measuring machines, wire bonders, laser tracking interferometers, routers, lathes, mills, and dicing machines.
Training No-Show Fees	Primary Effort	No-show fees for any missed training courses are charged to the employee's primary effort code.

Management and Supervision

Type of effort	Where to charge	Notes and Examples
Department Management & Supervision	If the group being managed has one Primary Effort, then Direct charge to that Primary Effort, otherwise 40PD_40PD.00.02_PPD Mgmt & Suprvsn	Applies to Department Heads, Deputy/Associate/Assistant Department Heads, Group Leads, and Supervisors with direct reports. Includes ITNA reviews for employees, department budget planning, performance reviews, timecard review & approval, workplace conduct matters, recruiting. Not for project management or experimental operations management.
Management & Supervision - Experimental Operations, Collaborators, Guests & Visitors	Direct charge	Experimental operations management and non-employee supervision activities. Includes experiment budget planning and non-employee ITNA reviews.

Business Development & Project Development

Type of effort	Where to charge	Notes and Examples
Business Development & Project Development	Direct charge. If a direct charge cannot be identified, then use 40PD_40PD.00.21_Business Development (G&A)	Developing future project estimates, SPP/CRADA/Reimbursable estimates, and proposals. Includes activities related to assessing feasibility and defining scope, cost, and scheduling for proposed work. Only charge G&A if the effort cannot be billed directly to a project or related scope of work. Not for Researchers working on FOA, ECA, or LDRD proposals, which should be charged to the Research B&R.

Support Services and Other Support Activities

Type of effort	Where to charge	Notes and Examples
Project Support Services	Direct charge	Project-dedicated support services - Administrative, Project Finance, Project Controls, Procurement
Engineering Support, Tool Support, and Equipment Support	Direct charge if available. If the group being supported has one Primary Effort, then direct charge to that Primary Effort, otherwise Burden pool	Support and maintenance of tools, software, and equipment used by engineering or technical groups.

Building-related

Type of effort	Where to charge	Notes and Examples
Building Management	40PD_40PD.01.02.02_DDOD Bldg Mgmt	PPD building management activities such as ES&H compliance, maintaining long-term maintenance agreements, overseeing space allocation and usage, and tracking and oversight of building maintenance and repairs
Building Improvements & Cleanup	40PD_40PD.01.02.03_DDOD Clnup BMod	PPD building improvement activities such as upgrades and modifications that extend the useful life of the building, and work space cleanup of PPD areas.
Building Maintenance	40PD_40PD.01.02.04_DDOD Bldg Repair	PPD building maintenance activities such as general building repairs and preventative maintenance of plant physical equipment.
Janitorial Requests (Clorica)	40PD_40PD.01.01.22_Janitorial Requests	Special janitorial requests of PPD-owned areas including detailed cleaning of: offices, refrigerator and kitchens/break rooms, water coolers, air compressors, blinds, carpet shampooing and other floor surfaces, dumpsters and secure shred bins. M&S only, no personnel costs.

Meetings & Conferences

Type of effort	Where to charge	Notes and Examples
All-Hands Meetings	Primary Effort	All-hands meetings for Fermilab or an organization
Conferences, Workshops, & Colloquia	Direct charge. If a direct charge cannot be identified, then use Primary Effort.	Conference, Colloquia and Workshop Activities - such as Conference Travel, Attendance, Presentations
Meetings not categorized elsewhere	Direct charge. If a direct charge cannot be identified, then use Primary Effort.	Department, group, or other meetings not listed elsewhere but required for job function

Division Office Only

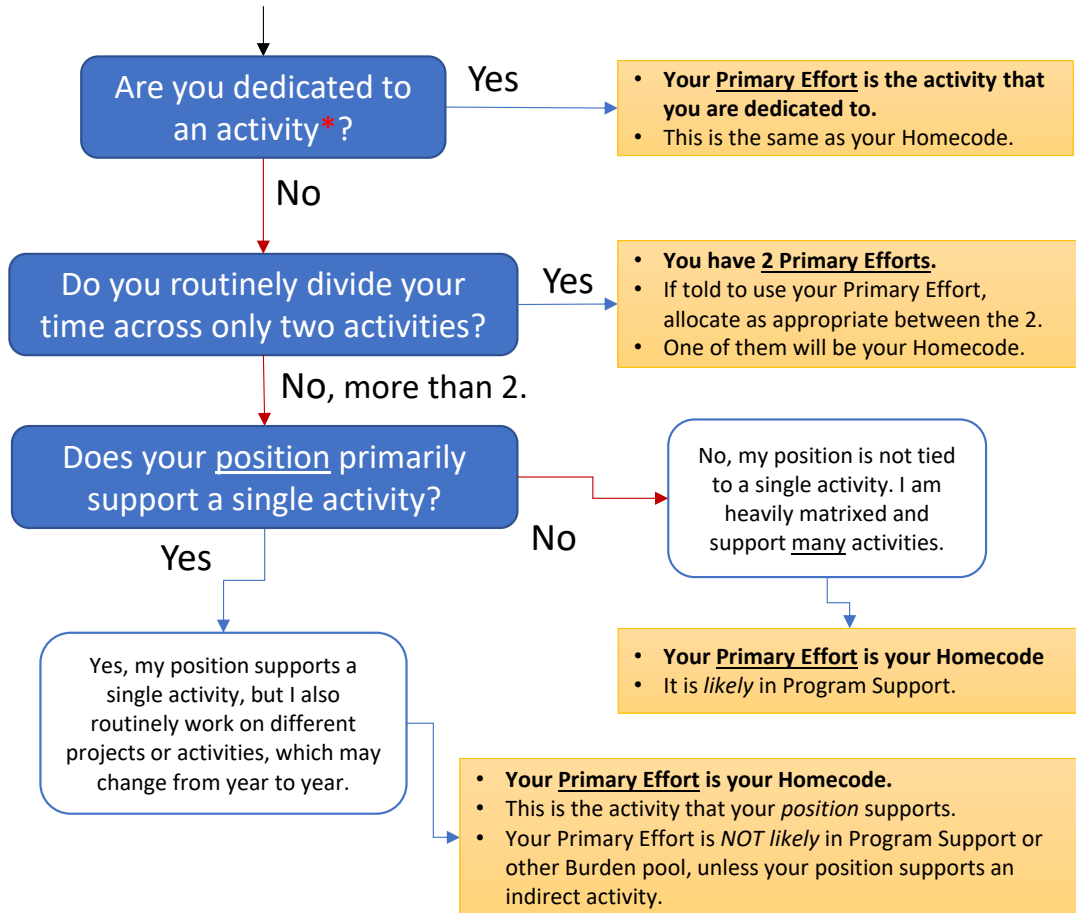
Type of effort	Where to charge	Notes and Examples
Division Management	40PD_40PD.01.01.01_PPDO Div Office Mgmt	Applies to Chiefs, Division Heads, Deputy/Associate/Assistant Division Heads. Division management and supervision activities necessary to manage a division. Not for department or group lead management. Not for project management or experimental operations management.
Division Support Services	Admin - 40PD_40PD.10.02.01_SS Admin Support Finance - 40PD_40PD.01.03.01_PPDO Financial Mgmt	Division support services including Administrative, Budget, Finance, Business, and Procurement

*** What is an "activity"?**
 If the effort falls within one of the following groupings, then it is a single activity.
 1) Task code
 2) Project (big-P) or Program
 3) FWP or other defined scope of work (SPP, CRADA, etc.)
 4) B&R or Burden pool
 • B&R at the 9-digit level, including local use and fund type distinctions. (Ops, Research, plus OPE/EQU, etc.)

**** Employees working 40+ hours a week may charge up to six hours per month on EDI/EPE combined without seeking prior manager approval. Employees working less than 40 hours per week may charge up to 3% of their regular hours each month without prior manager approval. If you have not already been approved to charge more than 6 hours per month on EDI/EPE combined and you wish to do so, please consult the policy.**

Consult your supervisor or FFM if unsure of the appropriate task number.

- PPD Employees Only - What is my Primary Effort? What is my Homecode?



- Homecodes are *usually* the same as your Primary Effort. If you aren't sure, then confirm your homecode with ppdkronos@fnal.gov.
 - Primary Efforts and Homecodes should be reevaluated periodically by the Field Financial Manager (FFM) with input from division management.
 - See PPD Labor Charging Practices for when to use your Primary Effort.
- * What is an "activity"?**
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- 1) Task code
 - 2) Project (big-P) or Program
 - 3) FWP or other defined scope of work (SPP, CRADA, etc.)
 - 4) B&R or Burden pool

Example	Primary Effort(s)
Postdoc split between core research and AI/ML, with occasional work on EDI	2 Primary Efforts - both core research and AI/ML
Research department head	Research B&R (homecode)
Engineer working on many different projects	Homecode
Technician working on a single project for an extended period, with occasional work on EPE	Project
Group lead split between a project and facility operations	2 Primary Efforts - both the project and facility operations
Deputy department head working on 2 different projects plus operations	Homecode

- Reminders:**
- **Charge to the project, program, or activity that supports, benefits, or causes the work.**
 - **Use charging practice guidelines for other specific activities - such as serving on reviews, EDI/EPE, management time, and business development.**
 - **If none of the above apply and the appropriate code cannot be identified, then that's usually when someone will need to know and use their Primary Effort(s).**