

Effort Certification Process



This QRC provides the steps for certifying effort, starting with the Effort Certification Partner reviewing and deploying the task to the employee. Pls (Principle Investigators) have the responsibility of handling effort certification for any student workers assigned to their grants and will follow the same process. If the effort report needs an update, this should only be completed by the Effort Certification Partner and not the worker or PI.

Review the Effort Certification for Worker – Effort Certification Partner

1. From the Landing Page, navigate to **My Tasks**.
2. Select the task for the employee whose effort needs to be reviewed.
3. If there are no updates necessary, select **Submit**. This will route the effort certification to the worker or the PI for review and final submission.
If changes are needed:
4. Select **Change Effort**. This will navigate you to a page where you will make the necessary changes to the effort reporting. You will correct percentages (the total must still equal 100%) and add or remove funding sources as needed. You must select the reason for the change on each corrected line. Each pay period will need to be reviewed and updates made for each.
5. Once the necessary changes are completed, click **OK** to navigate back to the task.
6. Select **Submit**. This will route the updated effort certification to the worker or the PI for review and final submission.

Note: Effort Partners can also access the list of workers who require effort certification by using the **Effort Certification Work Area Report**.

1. In the search bar, type **Effort Certification Work Area**.
2. This will navigate you to the report which has two tabs:
 - a) **Overview** shows all of the workers within your area that have Effort Certification tasks. Administrative Review are those that are still with you as the Effort Certification Partner. Certify Effort Certification are those that are with the worker or PI for certification.
 - b) **My Work Queue** shows all of the workers in your queue to review. You can select the **Review** button on each employees line to take you directly to the task, or select multiple employees and select **Mass Submit** if you are certain no changes are necessary for those selected workers.

The screenshot displays the Effort Certification system interface. At the top, there's a navigation bar with 'Change Effort' and 'Submit' buttons. Below this, the 'Administrative Review' section shows a table with columns for 'Original Percent', 'Change Reason', 'Certified Percent', and 'Estimated'. The table contains two rows of data. To the right, the 'My Work Queue' section shows a table with columns for 'Effort Certification Type', 'Start Date', 'End Date', 'Unassigned', 'Assigned', and 'Review'. The table lists several tasks with their respective dates and review status.

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Certify Effort – Worker or PI

1. From the Landing Page, navigate to **My Tasks**.
2. The effort certification task that was deployed to you from your Effort Certification Partner will display.

Note: For student workers, the effort certification task will route to the PI rather than to the worker. The PI will follow the same steps as if they were certifying effort for themselves.

3. Review the effort. If there are no updates necessary, select **Submit**. This will complete the effort certification process.

If changes are needed:

4. Select **Send Back**. (Do not click on Change Effort)
5. In the pop up, indicate what changes the Effort Certification Partner should make in the **Reason** box.
6. Select **Submit**.

The effort certification task will route back to the Effort Certification Partner. Once they complete the changes indicated, or discuss appropriate changes with the worker, the Effort Certification Partner will re-submit.

7. Review the updated effort certification and click **Submit** if no further changes are required.

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