Effort Certification

User’s Guide
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The Effort Certification Process

Step 1: Effort Certification Initiation by Grant Accounting Lead

Step 2: Administrative Review
- PI Worker: Effort Certification Review by PI Worker as self
  - Reviewer approves
  - Reviewer makes a change
  - Worker certifies & process is finalized
- Student or Terminated Worker: Effort Certification Review by Certification Manager Reviewer
  - Reviewer approves

Step 3: Effort Certification Review
- PI Worker: Review of an effort certification change
  - Manager approves
  - Manager makes a change
  - Manager certifies & process is finalized
- Student or Terminated Worker: Project Manager(s) Approval
  - Manager approves
  - Manager changes effort & sends back for second Effort Certification Review

Step 4: Effort Certification Manager Approval
- Manager approves

Step 5: Payroll account adjustments
- Process is finalized

After changes, allow one week for process to be finalized. The worker will be notified, only if changes are declined.
Section 1: Sample Effort Reports
Sample Summary Effort Report

The summary report shows the overall estimated percentage allocations for sponsored and non-sponsored projects.

<table>
<thead>
<tr>
<th>Sponsored Effort</th>
<th>Certified Percentage of Group Estimated</th>
<th>Certified Percentage of Total Estimated</th>
</tr>
</thead>
<tbody>
<tr>
<td>003348 PSEI50 550 Project Master</td>
<td>100.0%</td>
<td>66.7%</td>
</tr>
<tr>
<td>Nongovernmental Grants</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Non-Sponsored Effort</td>
<td>100.0%</td>
<td>33.3%</td>
</tr>
<tr>
<td>30 Financial Aid - Federal</td>
<td></td>
<td></td>
</tr>
<tr>
<td>GFWST7 Federal Workstudy 2017</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Certified Percentage of Group Estimated – This is the average percentage for the pay period for the particular project.

Certified Percentage of Total Estimated – This is the total percentage of time spent on a project for a particular pay period.

Sample Detailed Effort Report

The detailed effort report shows the breakdown of effort for each pay period.
Section 2: Employees
How to Certify Effort Reports

Steps:
Follow these steps to certify your effort report:

1. **Log into Workday**

2. **Navigate** to your inbox by clicking on the cloud icon in the upper right hand corner and then select ‘Inbox’. You will be taken to your inbox where your effort report requiring review will be present.

3. **Select** the effort report to be reviewed. The report will be visible to the right.

4. **Scroll** to review and then **check** the ‘I Certify’ box.
5. **Click Submit.** You will be presented with the following message: Success! Event Submitted (Process Successfully Completed).

6. **Select Done.**
How to Change to your Effort Report

Steps:
Follow these steps to make changes to effort reports.

1. **Log into Workday.**

2. **Navigate** to your inbox by clicking on the cloud icon in the upper right hand corner and then select ‘Inbox’. You will be taken to your inbox where an effort certification requiring review will be present.

3. **Select** the effort report. The report will be displayed to the right.
4. Select ‘Change Effort’. You will be able to make changes to costing allocations and payroll accounting distributions.

a) Find the appropriate pay period.

b) Add and make changes to a new line by doing the following:
   
   NOTE: Adding a new line will allow you to make changes to the cost center, fund, project, PS Account, location and activity code as well as the percentage (%) allocation.

i. Click the (+) symbol. A line will be added with the original information copied into the new line.

![Image showing the addition of a new line](image1)

ii. In the new line, give a reason for the change by doing the following:
   
   a. In the Change Reason column, click the prompt (three lines on the right side of the box).

![Image showing the change reason column](image2)

b. Select Costed Reason Codes and then select Administrative Correction.
iii. In the **Certified Percent Estimated** column enter the new percentage.

iv. **In the original line**, repeat steps ii (a), (b) and iii above.

v. In the **Costing** column of the **new line**, click on the prompt to update the cost center, fund and project in the original and new line.
NOTE: The percentages per pay period must = 100%.

vi. After making changes, click OK.

vii. Click on Questions tab and complete survey questions.
viii. Check the I Certify box then Submit.
How to Send Back/Reject an Effort Report

Steps:
Follow these steps to send back an effort report for review or updating.

1. **Log into Workday.**

2. **Navigate** to your inbox by clicking on the cloud icon in the upper right hand corner and then select ‘Inbox’. You will be taken to your inbox where you will be presented with an effort certification requiring your review.

3. **Select** the effort report to be reviewed. The report will be visible to the right.
4. **Scroll** to review and then click Send Back. You will be presented with the Send Back pop up box.

![Send Back pop up box](image)

5. **Select** the recipient by clicking the prompt. Enter a reason for rejecting the effort report and click **Submit**.

![Send Back form](image)

6. You will be presented with the following message: Event Sent Back.

7. **Select** Done.
Section 3: Students/Terminated Workers

*Note: PI/Managers will certify the effort for students and terminated workers.
How to Certify an Effort for Student and Terminated Workers

Steps:
Follow these steps to certify an effort report.

1. **Log into Workday.**

2. **Navigate** to your inbox by clicking on the cloud icon in the upper right hand corner and then select ‘Inbox’. You will be taken to your inbox where your effort report requiring review will be present.

3. **Select** the effort report to be reviewed. The report will be visible to the right.
4. **Scroll** to review and then **check** the ‘I Certify’ box.

5. **Click** Submit. You will be presented with the following message: Success! Event Submitted (Process Successfully Completed)

6. **Select** Done.

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**How to Change an Effort Report**

**Steps:**
Follow these steps to make changes to an effort report.

1. **Log into Workday.**

2. **Navigate** to your inbox by clicking on the cloud icon in the upper right hand corner and then select ‘Inbox’. You will be taken to your inbox where an effort certification requiring review will be present.
3. **Select the effort report.**

4. **Select ‘Change Effort’.**
   
a) Changing an effort requires adding a new line. Do the following to make changes to your effort.
   
   **NOTE:** Adding a new line will allow you to make changes to the cost center, fund, project, PS Account, location and activity code as well as the percentage (%) allocation.
i. **Click** the (+) symbol. A line will be added with the original information copied into the new line.

![Click here](image1)

ii. Give a reason for the change by doing the following:
   a. In the **Change Reason** column, click the prompt (three lines on the right side of the box).

![Click here](image2)

   b. **Select** Costed Reason Codes and then select Administrative Correction.

![Select Costed Reason Codes](image3) → ![Select Administrative Correction](image4)
iii. In the **Certified Percent Estimated** column enter the new percentage.

iv. **In the original line**, repeat steps ii (a), (b) and iii above.

v. In the **Costing** column of the **new line**, click on the prompt to update the cost center, fund and project.

vi. After making changes click **OK**.

**NOTE:** The percentages for each pay period must = 100%.
vii. Click on Questions tab and complete survey questions.

viii. Check the I Certify box then Submit.
Check the I Certify box
Section 4: Principal Investigators/Project Managers/Department Managers
How to Review Project Labor Distribution Review Report

Steps:
Follow these steps to review the labor distribution report.

1. In the search box, type 'Project Labor Distribution Review'.

2. Press Enter. You will be navigated to the Project Labor Distribution Review page.
3. In the period field, select the appropriate timeframe (eg. FY2017 Dec) by doing the following:
   a) Click on the prompt (three lines to the right). The menu will expand.
   b) Select Current and Prior Periods.
   c) Select appropriate timeframe (eg FY2017 Dec).

4. Click OK to view report. The report will be generated.
5. Review the report. The report will list your projects with the ability to see the employees assigned to your projects. See sample report below.
How to Certify an Effort for Students and Terminated Workers

Steps:
Follow these steps to certify an effort report.

1. **Log into Workday.**

2. **Navigate** to your inbox by clicking on the cloud icon and then select ‘Inbox’. You will be taken to your inbox where your effort report requiring review will be present.
3. **Select** the effort report to be reviewed. The report will be visible to the right.

![Effort report](image1)

4. **Scroll** to review and then check the *I Certify* box.

![Check the 'I Certify' box](image2)

5. **Click** *Submit*. You will be presented with the following message: Success! Event Submitted (Process Successfully Completed).

6. **Select** *Done*.
How to Approve Changes to an Effort Report

Steps:
Follow these steps to approve changes made to an effort report.

1. **Log into Workday.**

2. **Navigate** to your inbox by clicking on the cloud icon and then select ‘Inbox’. You will be taken to your inbox where your effort report requiring review will be present.

3. **Select** the effort report to be reviewed. The report will be visible to the right.

4. **Review** and then select Approve.
5. You will be presented with the following message: Success! Event Approved ......

6. Select Done.

How to Change an Effort Report

Steps:
Follow these steps to make changes to an effort report.

1. Log into Workday.

2. Navigate to your inbox by clicking on the cloud icon and then select ‘Inbox’. You will be taken to your inbox where an effort certification requiring review will be present.
3. **Select** the effort report.

4. **Review** report and then **select** ‘Change Effort’.

   a) **Change Effort by Adding Lines**

   **NOTE:** *Adding a new line will allow you to make changes to the cost center, fund, project, PS Account, location and activity code as well as the percentage (%) allocation.*

   i. Click the (+) symbol. A line will be added with the original information copied into the new line.

   ii. Give a reason for the change by doing the following:

   a. In the **Change Reason** column, click the prompt (three lines on the right side of the box).
b. Select **Costed Reason Codes** and then select Administrative Correction.

iii. In the **Certified Percent Estimated** column enter the new percentage.

iv. **In the added line**, repeat steps ii (a), (b) and iii above.

v. In the **Costing** column in the **added line**, click on the prompt to update the cost center, fund and project.
NOTE: The percentages for each pay period must = 100%.

vi. After making changes click OK.

vii. Click on the Questions tab and complete survey questions.
viii. **Check the I Certify box then click Submit.**
How to Send Back/Reject an Effort Certification

Steps:
Follow these steps to send back/reject an effort report.

1. **Log into** Workday.

2. **Navigate** to your inbox by clicking on the cloud icon and then select ‘Inbox’. You will be taken to your inbox where you will be presented with an effort certification requiring your review.

3. **Select** the effort report to be reviewed. The report will be visible to the right.
4. **Review** report and then **click** Send Back. You will be presented with the Send Back pop up box.

![Review Effort Certification MSU Effort Report for 12/31/2016](image)

5. **Select** the recipient by clicking the prompt. Enter a reason for rejecting the effort report and click Submit.

![Send Back](image)

6. You will be presented with the following message: Event Sent Back.

7. **Select** Done.