# The University of Toledo

# ONLINE EFFORT CERTIFICATION

# "*Quick Notes*"

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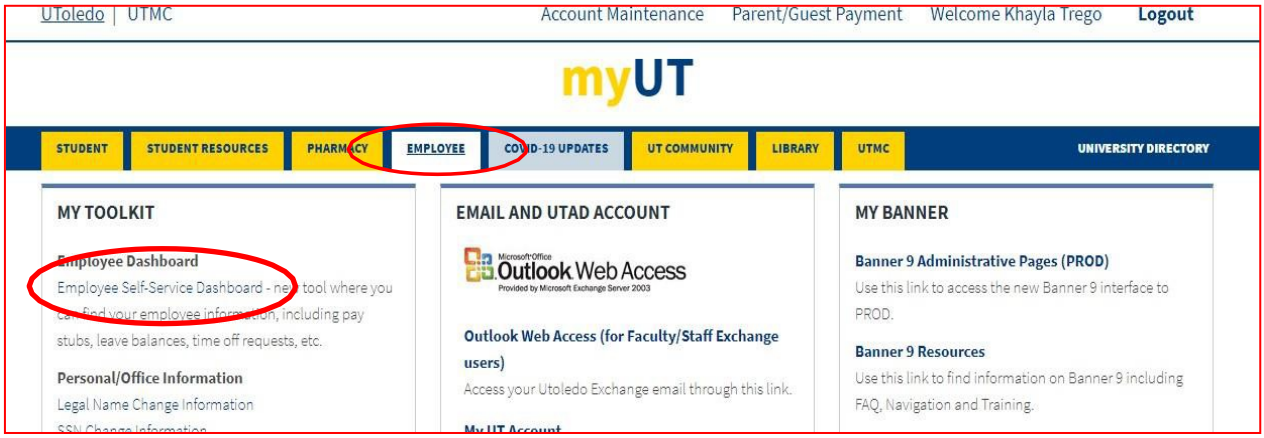
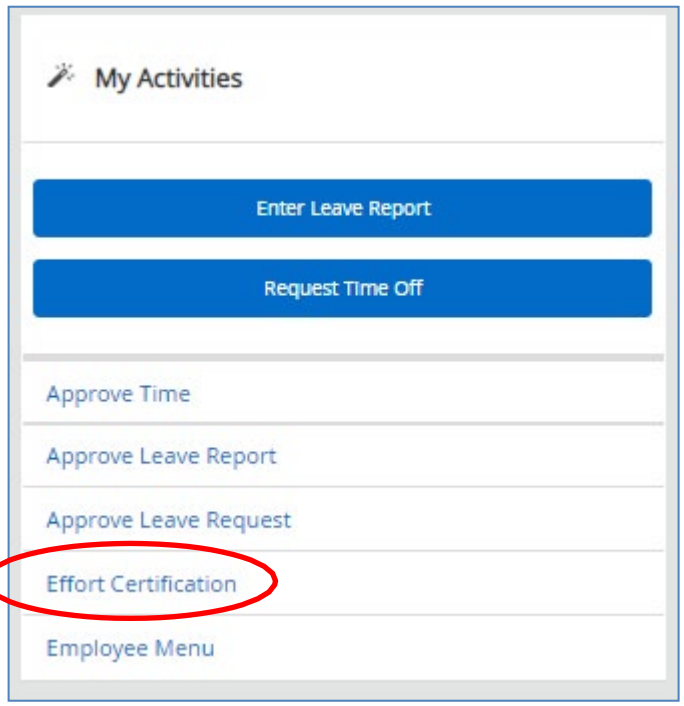
Online Effort Certification is integrated with other existing enterprise systems and is reachable via the normal campus access of **Self-Service in MyUT.**

## INSTRUCTIONS TO SIGN ON TO EFFORT CERTIFICATION

Effort Certification can be accessed through the Self-Service link in your "Employee" tab of MyUT.




Click on the "**Effort Certification**" link from your "**My Activities**" menu on the bottom right.

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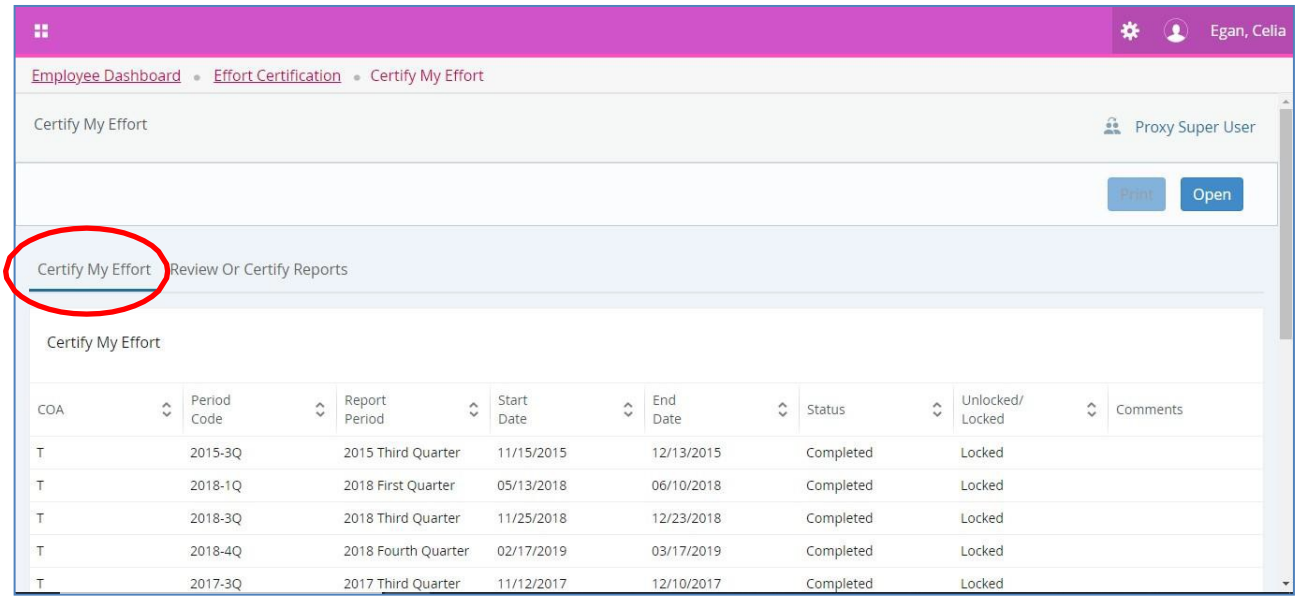
# ONCE SIGNED ON TO EFFORT CERTIFICATION

Once you are signed into Effort Certification your landing page will be the "**Certify My Effort**" tab ("Certify My Effort" tab on the Results Panel will have ahighlighted underline).

It is here where *your own* Effort Report will be listed if you have any effort of your own your own to certify (otherwise this page will be blank).

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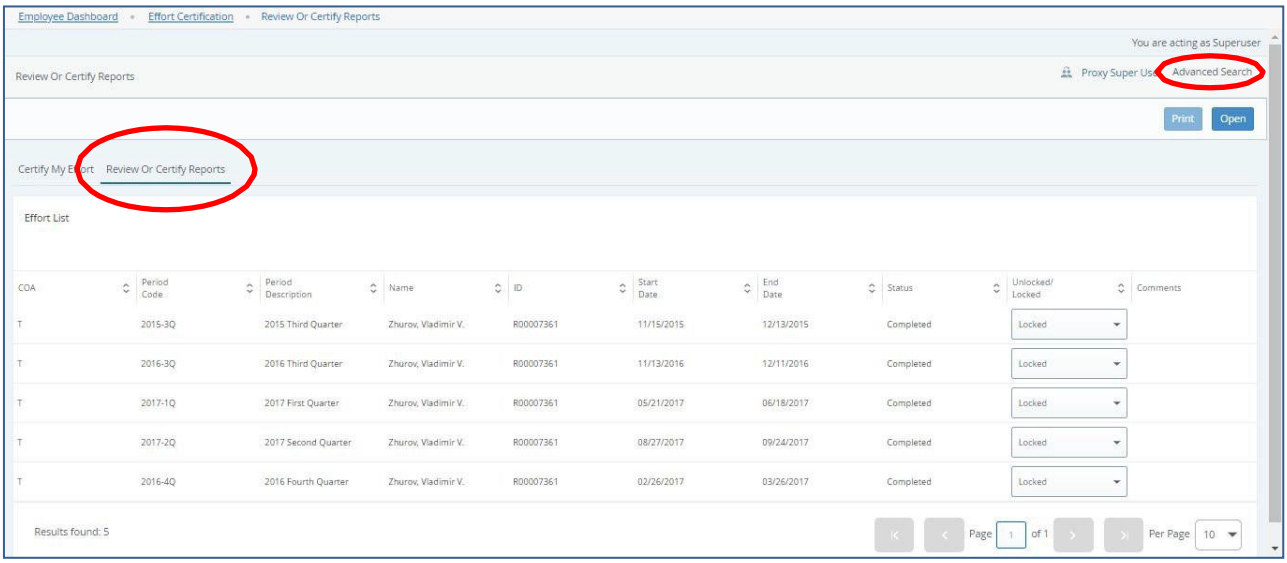
# PRE-REVIEW REPORTS FOR OTHERS ON YOUR TEAM

- Click on the "**Review or Certify Reports**" tab;
- Click on the "**Advanced Search**" Link if it does not automatically appear;
- In the **Advanced Search Dialogue Box** will pop up.
    - to Select Attributes use the available selections from the Drop-down Selection Boxes to choose attributes. For example to select:
        - "Chart of Account Code" = 'T' for the University of Toledo (*Always Required*)
        - "Effort Period Code" = '2020-3Q' (use Effort Period Code that you need to review)
    - Click on the "Go" Button and this will give you search results for anyone you are responsible for;
    - Also note the new search parameter of "Grant" that allows search by Grant Code AKA Award ID found in MySP.
    - Double-click on the line for the individual team member you want to review and the Effort Report Detail will open.

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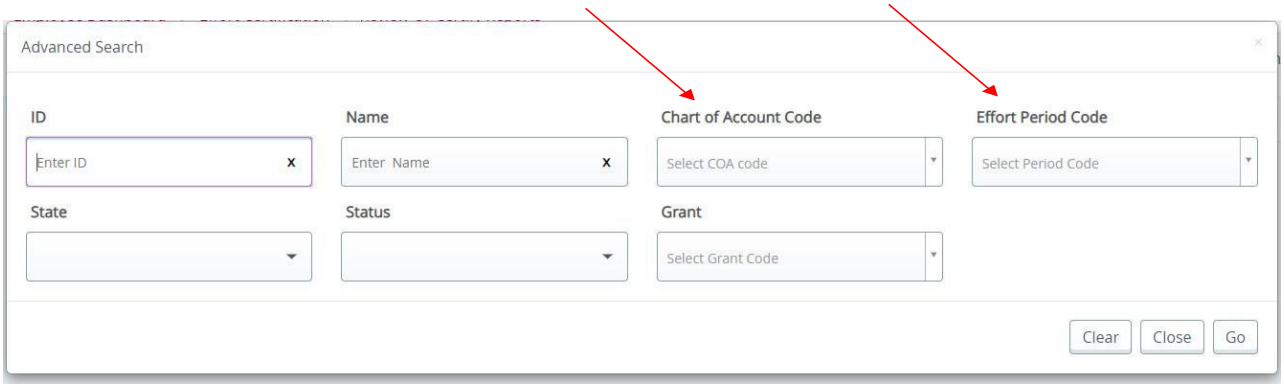


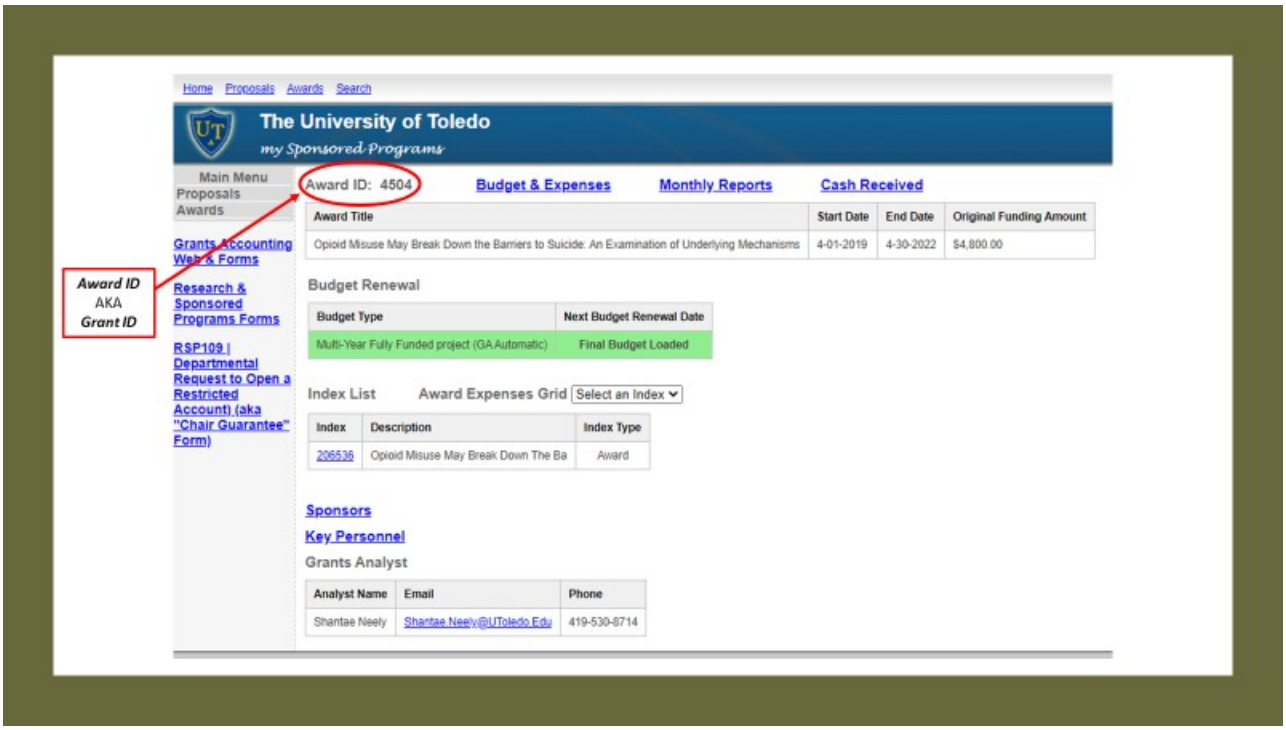


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# CERTIFY REPORTS

Once you have opened a report to view the Effort Report Detail there are number of options you will have. You will see the Effort Report detail in the middle of the screen with the "Sponsored" Effort and the "Non Sponsored" Effort sections and all totaling 100% of Effort.

Click on the "**Certify**" button to certify the report. A confirmation will appear and after confirming the certify button will no longer be visible.

On the tabs above the Sponsored area you will see links for:
**Pay Period Summary** - shows the information for each pay event included in the effort report along with working dates. This is the first tab we suggest you visit when reviewing your effort.

**Comments** - you may add comments to an effort report.

**Routing Queue** - you may review actions routing queue members that are in process, complete, or pending for the report.

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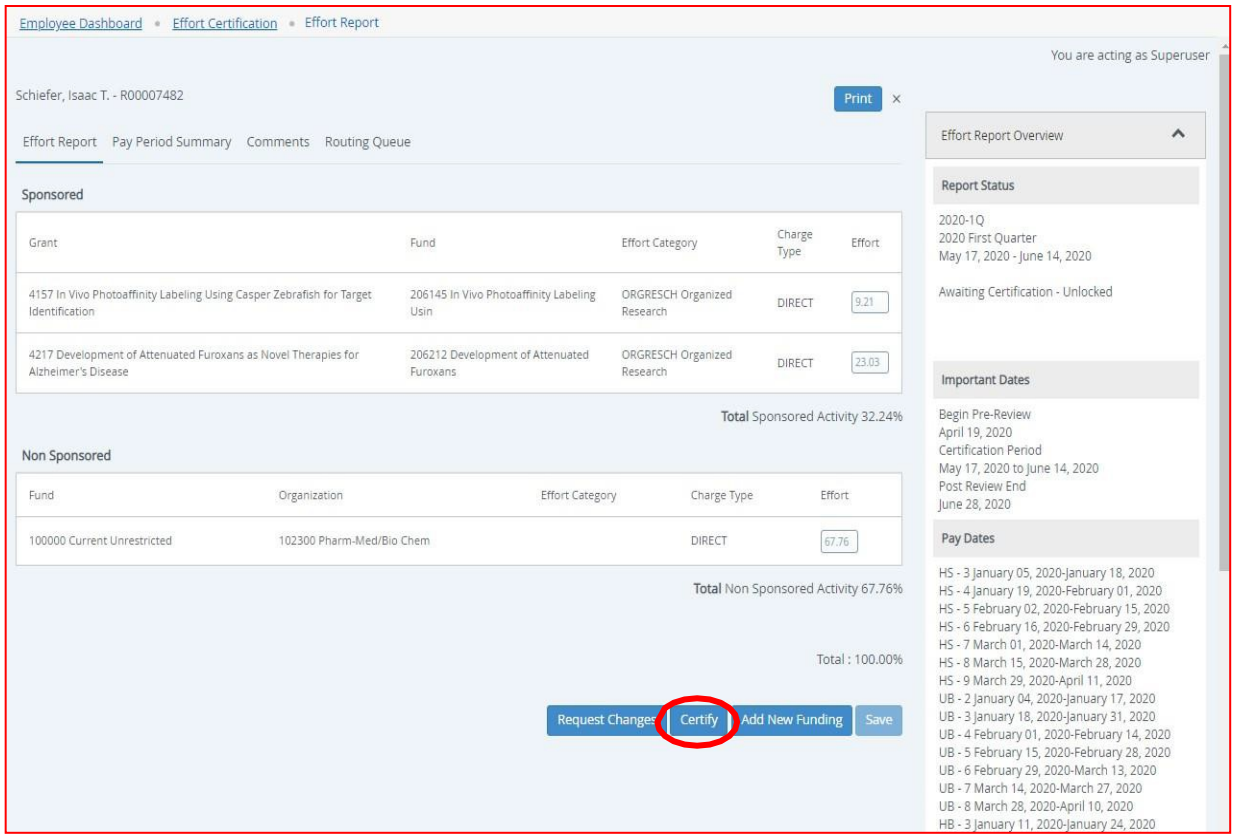


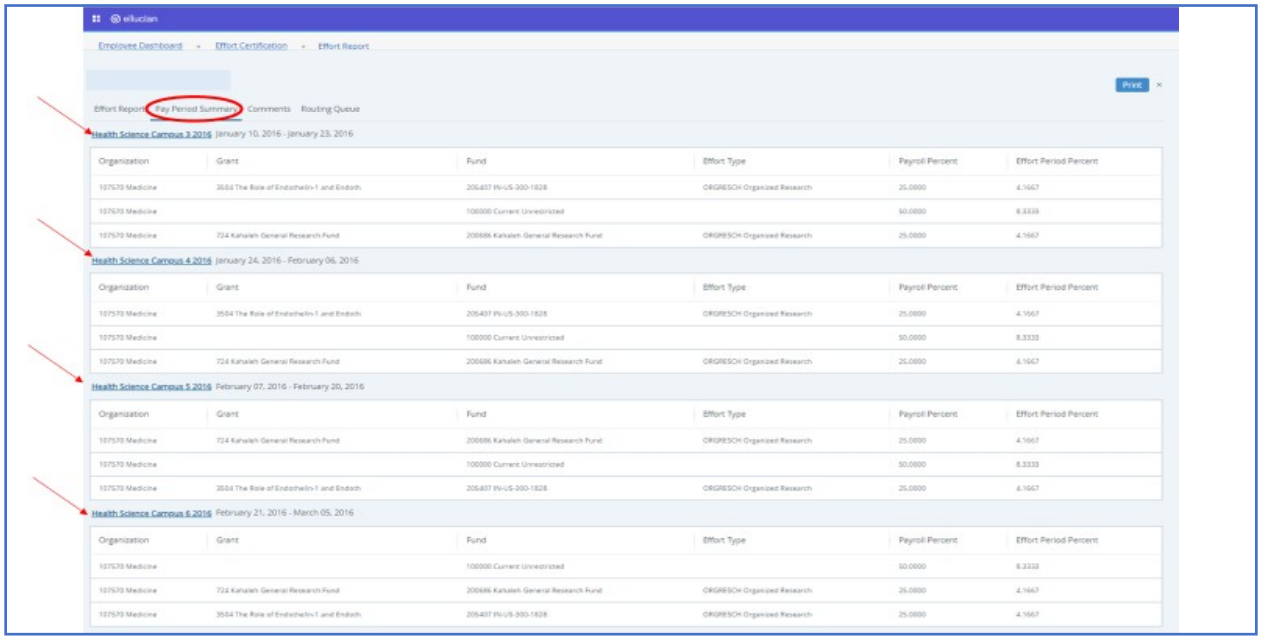


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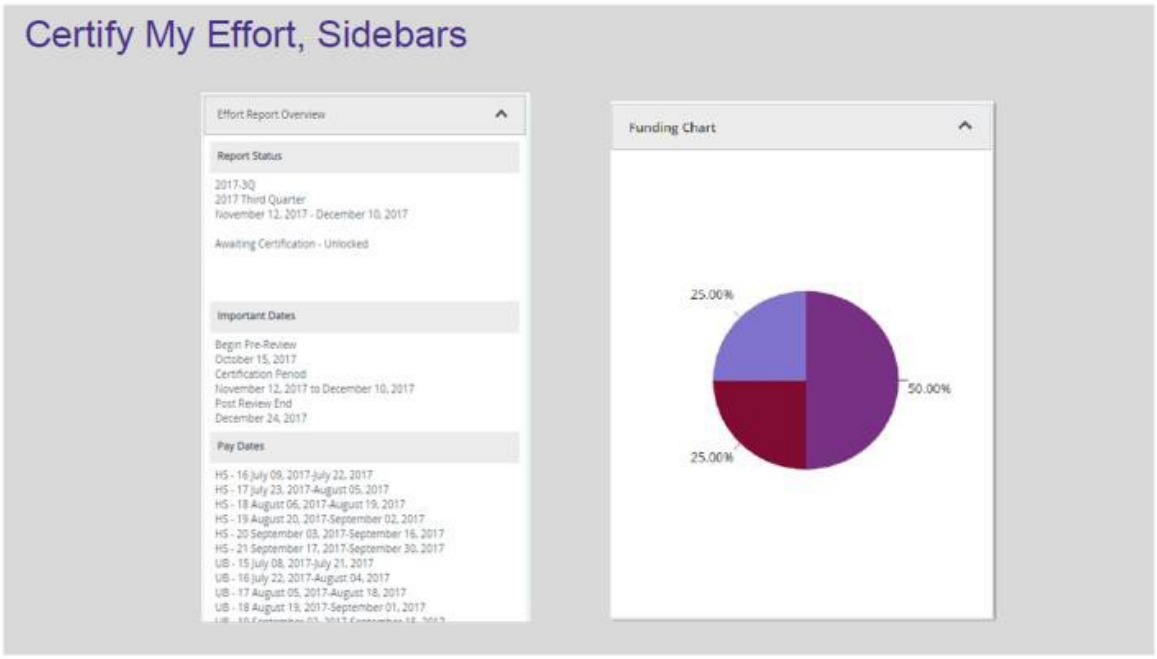
On the right panel you will see pull-downs for the Effort Report Overview and for a Funding Chart that represents the report detail.




- The Effort Report Sidebars provide support information and detail regarding the Effort Report.
    - Report Status: Includes the Report Effort Period, Certification Dates, and Status of Report.
        - Please note the Certification Dates here represent the timeframe allotted to perform the certification on the report and NOT the time worked.
    - Important Dates: The dates shown represent:
        - The Begin Pre-Review date (the first day of Pre-Review);
        - the Certification Dates (same as in the Report Status above);
        - and the Post-Review End date (the last day of Post-Review).
    - Pay Dates: Represent every Pay Group and the Pay Number of that group included in the Effort Reporting period.
    - The Funding Chart is a graphical representation of the effort percentages.

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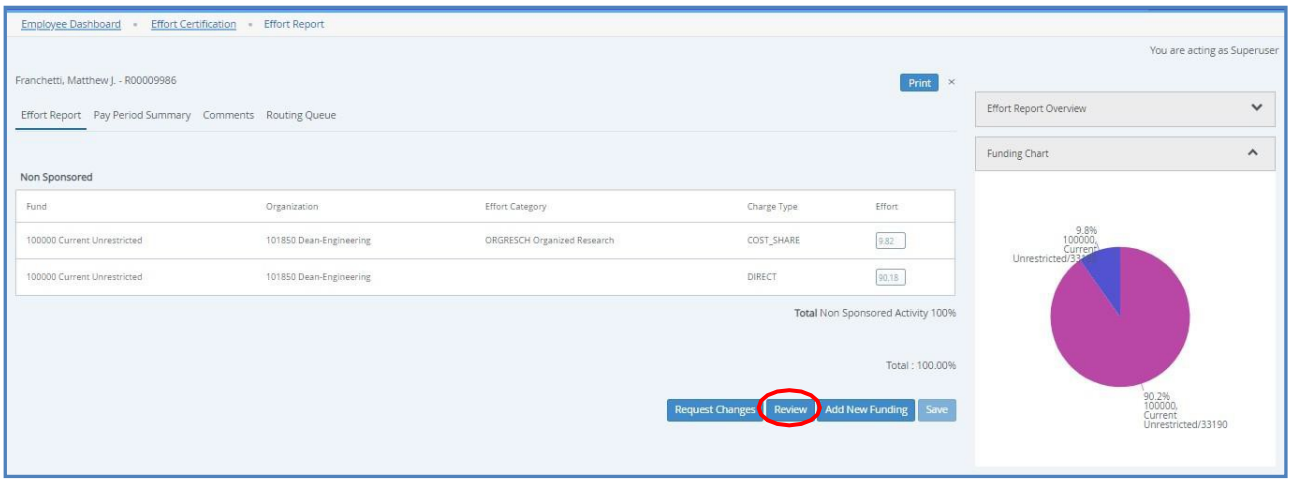
# POST-REVIEW A REPORT

During the Post-Review Phase a PI may review effort reports that have been certified. On the bottom, if the Post- Review Phase is open you will see a button that says "**Review**." Click this button if you agree with the certified Effort Report.

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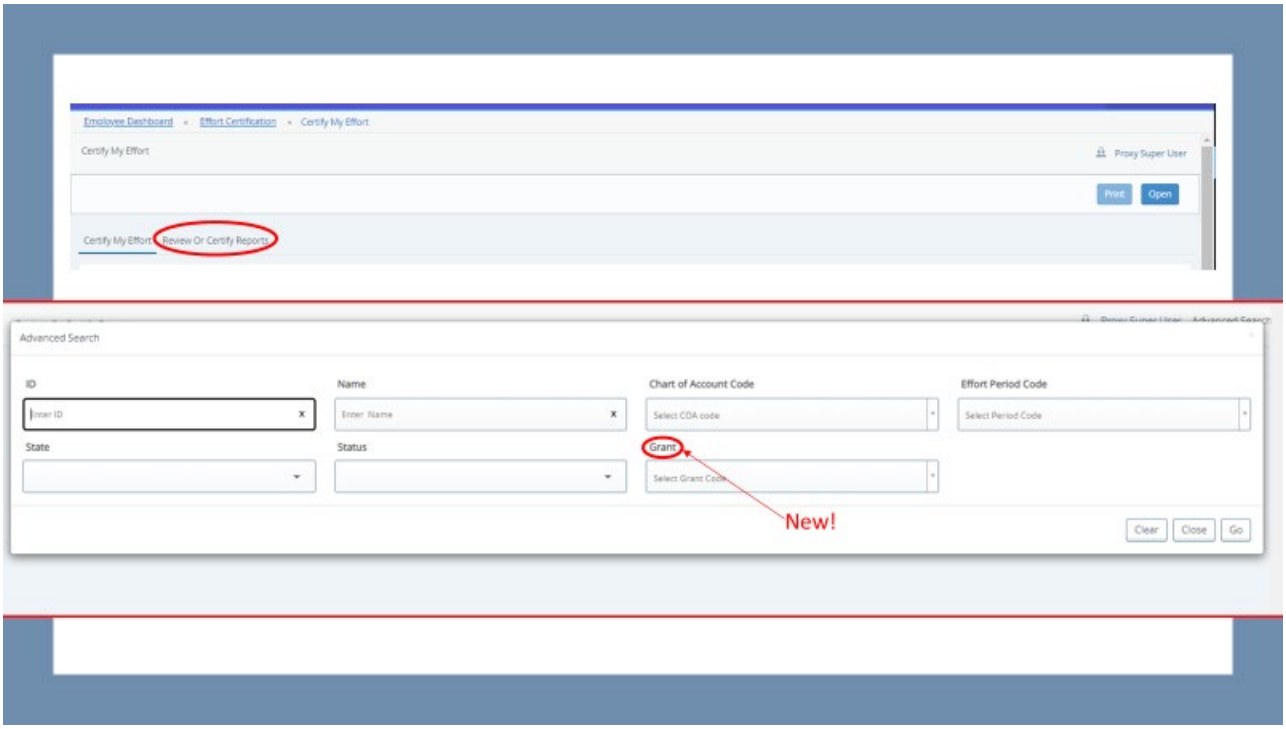
# ADVANCED SEARCH

The Advanced Search allows administrative users to search using the Advanced Search attributes to select Effort Reports matching search criteria.

There is a new ability to search by **Grant Code** (AKA **Award ID**). The Award ID may be found in MySP.

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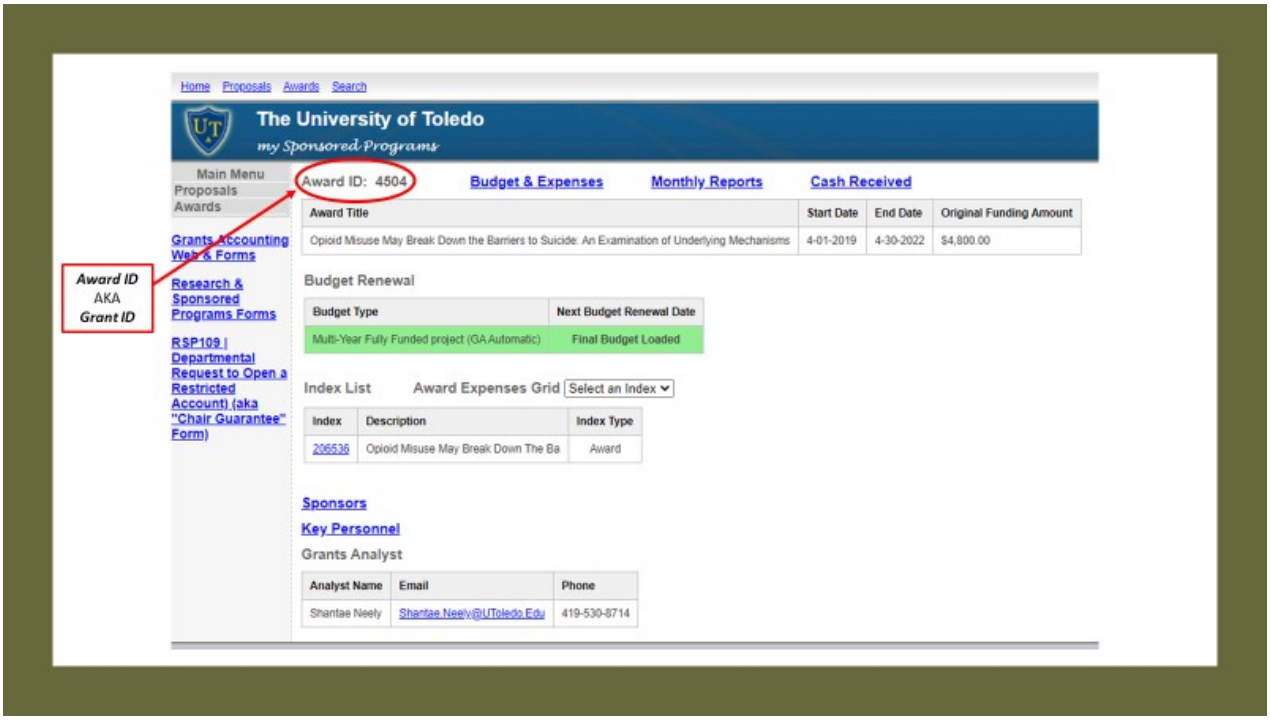
Here is a sample MySP screen shot:

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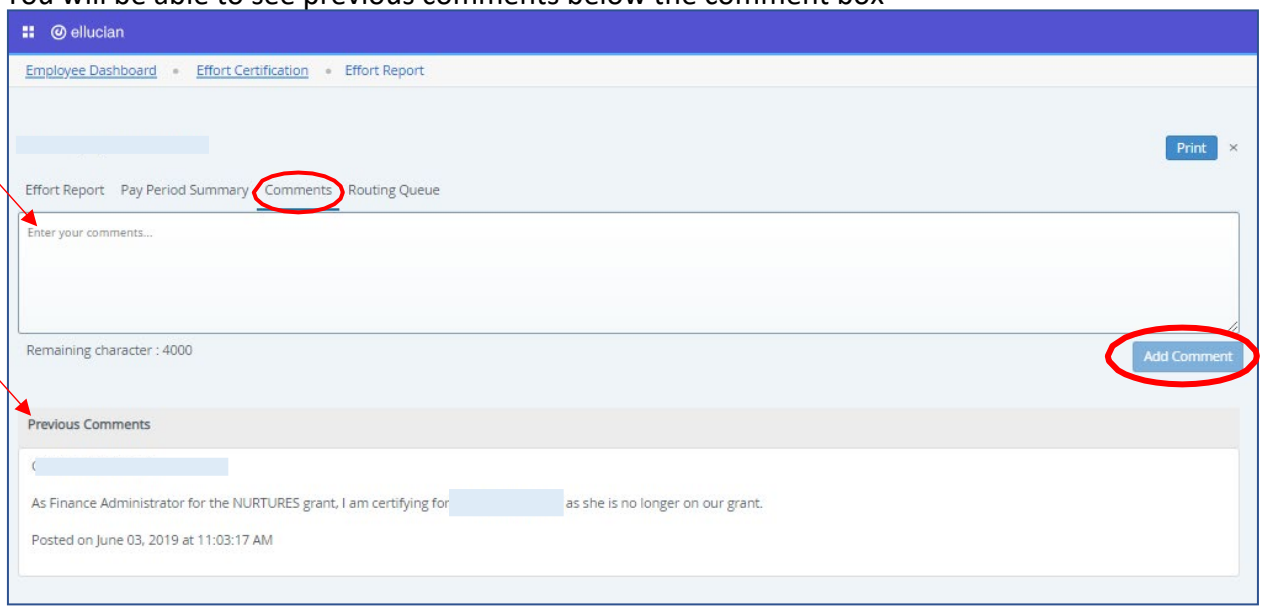
# ADDITIONAL REFERENCE DOCUMENTATION

## ADDING COMMENTS

To add a new comment, click the "Comments" tab at the top of the Effort Report.

You can then type your comment in and click the “Add Comment” button. This will save your comment to the report.

You will be able to see previous comments below the comment box

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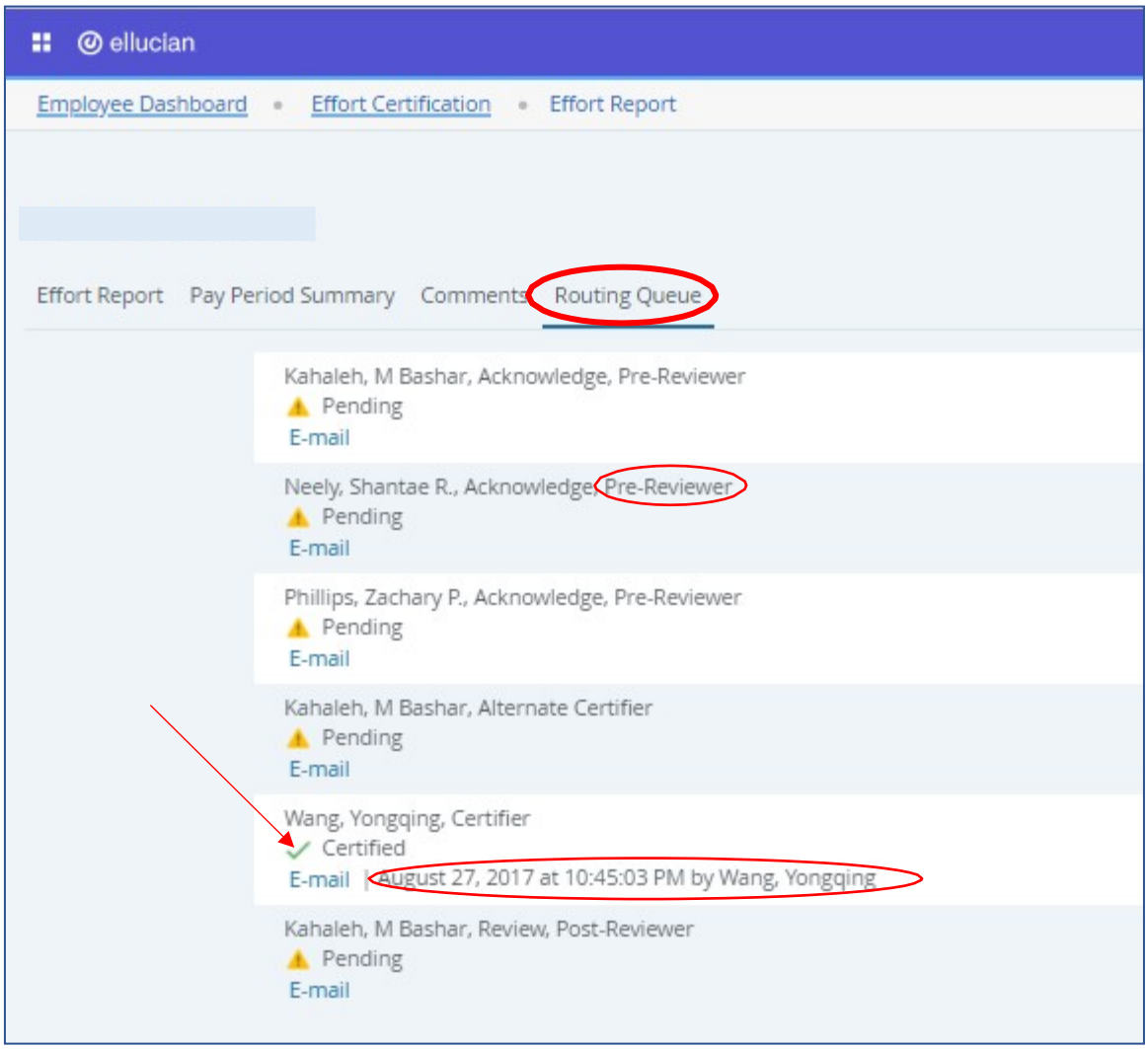
## ROUTING QUEUE

The "Routing Queue" tab at the top of the Effort Report provides information on the Grant Team Member and their Roles for that Effort Report.

It also will provide a Time & Date Stamp on the Certification and Post-Review when completed.

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# REQUEST CHANGES TO AN EFFORT REPORT

**If you believe an Effort Report is INCORRECT you will need to go to the incorrect Effort Report and click on the "Request Changes" button at the bottom of the screen.**

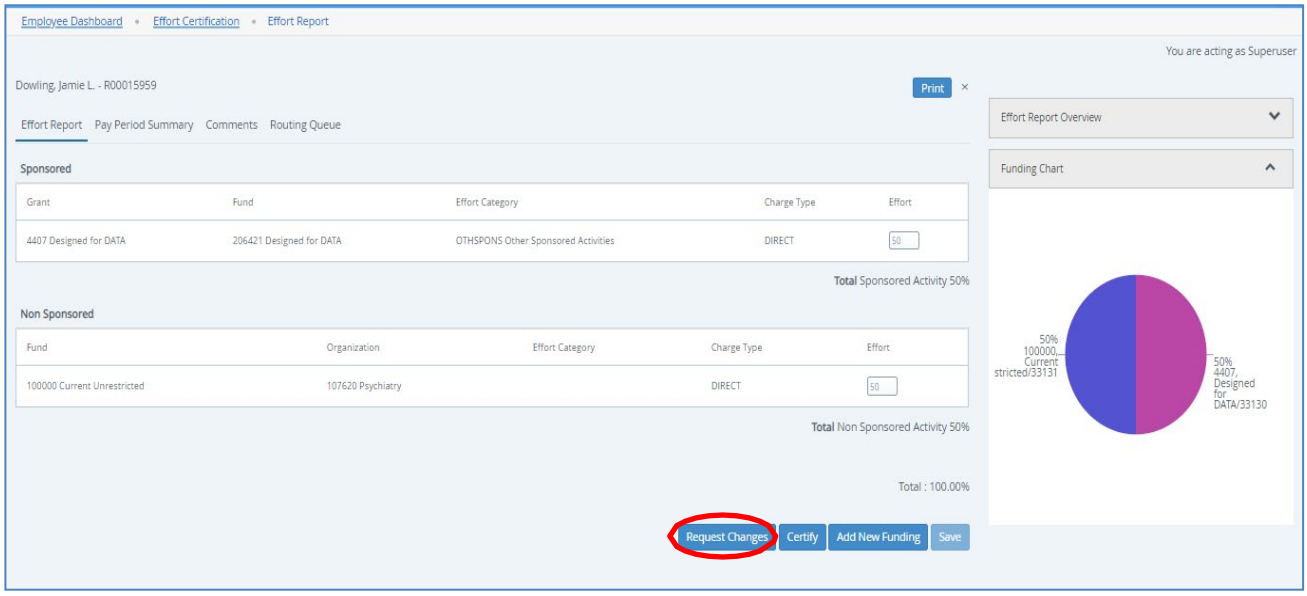
You may request changes to an Effort Report by clicking on the "**Request Changes**" button.

Use the Request Changes button to forward a request to the appropriate labor redistribution initiator to change the effort report. This action will put the report on hold (no one may certify or post-review the report) until changes are completed or cleared.

The email will only serve as a notification that changes are needed and the normal departmental procedures for payroll changes should be followed.

It is good practice to also insert a comment when changes are requested to the effort report.

NOTE: If you need to change ONLY distributions of previous pays you can find the "Payroll Redistribution Request" form **HERE** to send to your grants accounting analyst.

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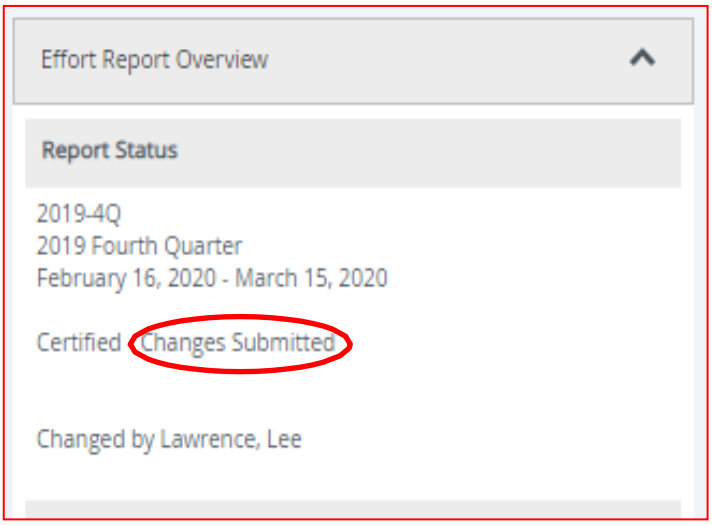
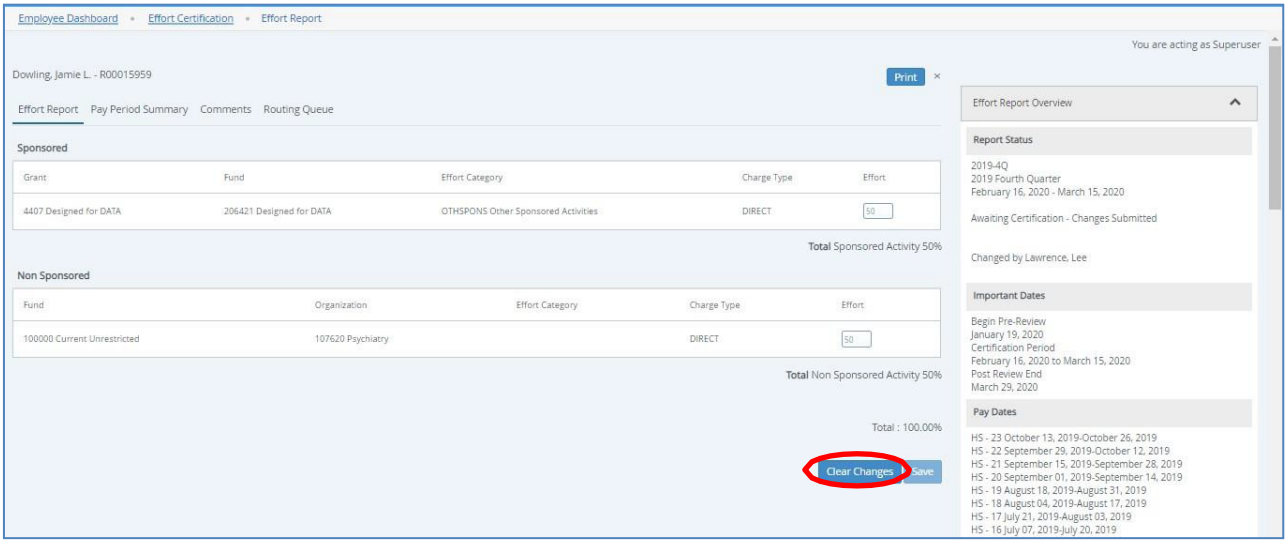
## IF CHANGES ARE SUBMITTED

If you see "**Changes Submitted**" next to the Status on the summary panel or a yellow warning triangle icon with the message "Pay events are in process that may affect this effort report" on the Status tab of the Effort Report Overview Panel (upper right corner in the Effort Report), then there are pay events that are still being processed on your records and you will not be able to certify.

You can see that changes have been submitted and who submitted changes in the Report Status area under the Effort Report Overview pull-down on the right panel.

You will not be able to perform effort certification tasks until these are completed or cleared by clicking the '**Clear Changes**' button.

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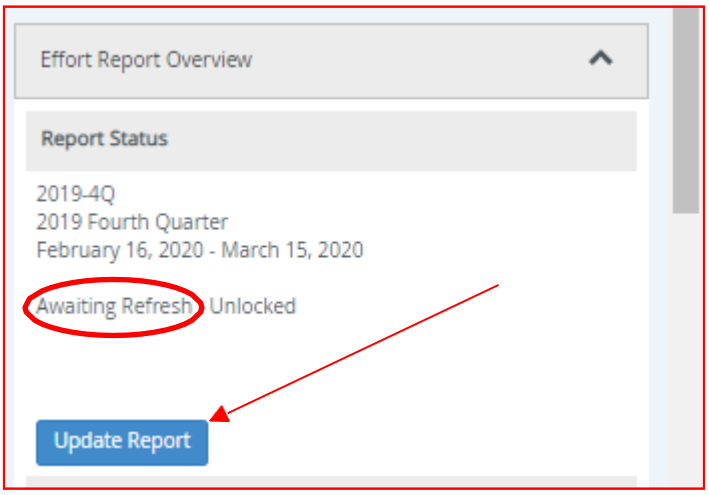
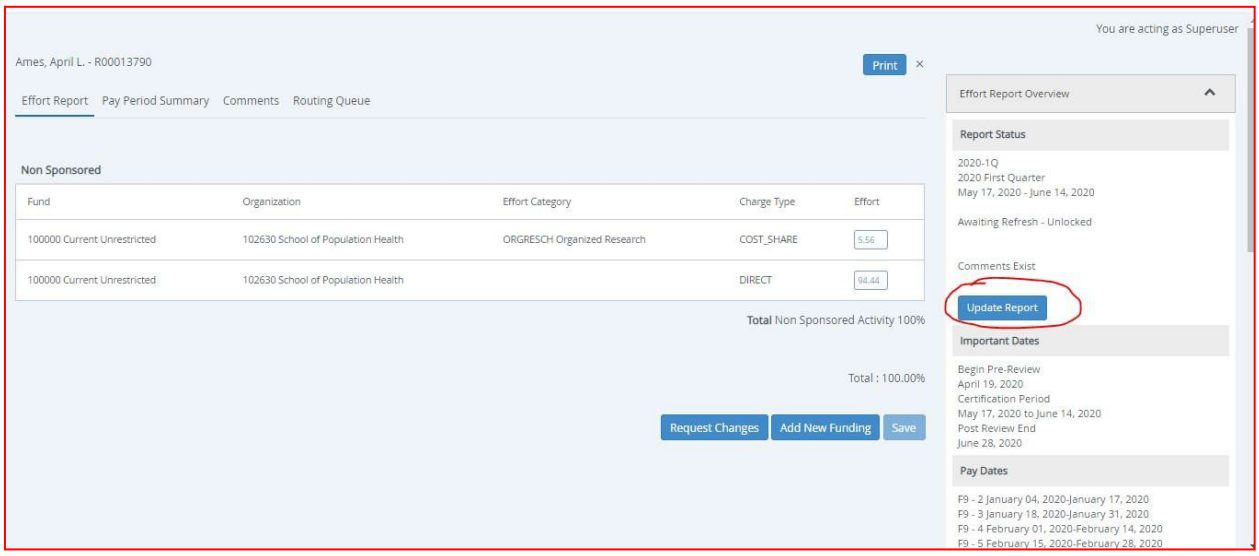
## WHEN CHANGES ARE COMPLETE

When changes are complete on related payroll records, the status on the summary panel will be “Awaiting Refresh.” The Effort Report detail panel on the right side will have an “**Update Report**” button which, when clicked, will refresh the report and bring in all of the updated records with changes to the report.

Relevant buttons (i.e. ‘Certify’ or ‘Review’) will become visible so the certification process may continue.

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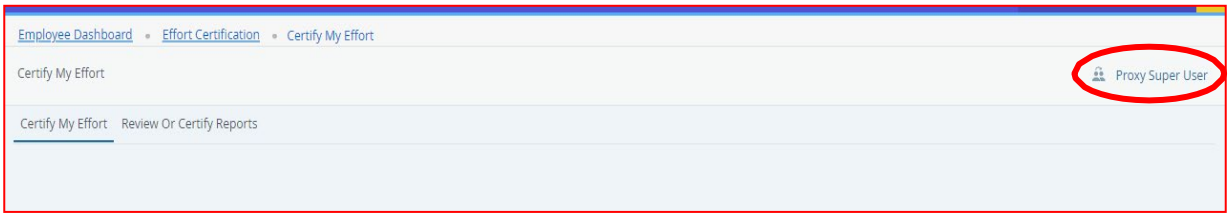
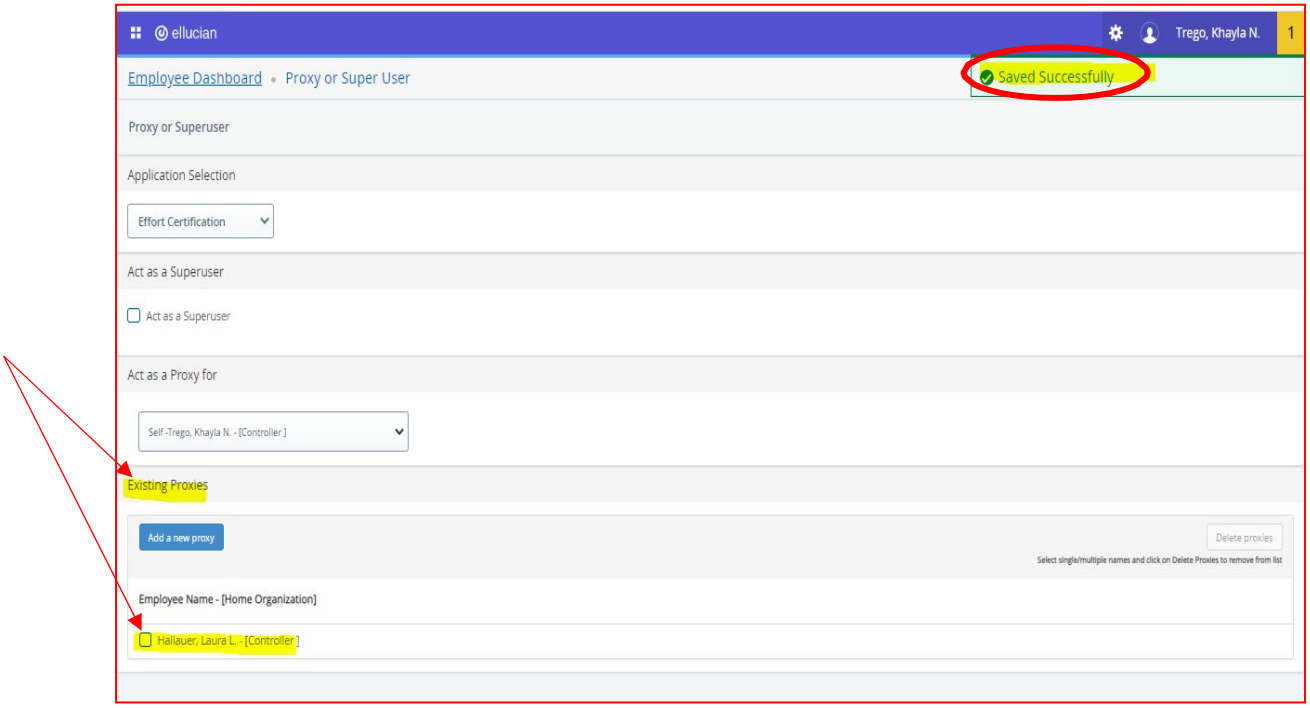
# ADD A PROXY

- From the main Effort Certification menu click "Proxy Super User" in the top right corner




- Click on “Add a new proxy”
- Type in the name of the employee you want to grant access to be able to be your proxy/ delegate and click on their name. "Saved Successfully" will appear in top right corner and their name will appear under "Existing Proxies"

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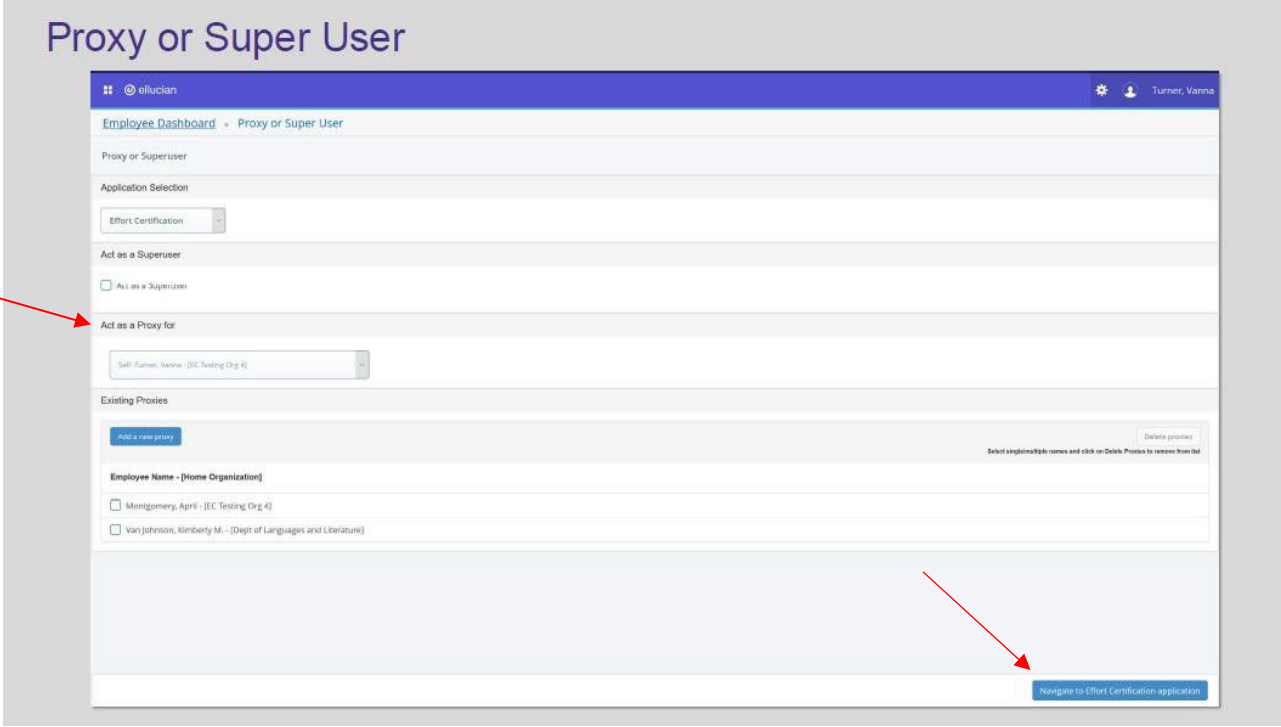
ACT AS A PROXY

- Click on “Act as a Proxy for”
- Choose the user you are authorized to work on behalf for
- Click on "Navigate to Effort Certification" application at bottom right to start acting as a proxy/delegate

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QUESTIONS

# Questions?

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