

# Effort Reporting Administrative/Pre-Review Training

## **Table of Contents:**

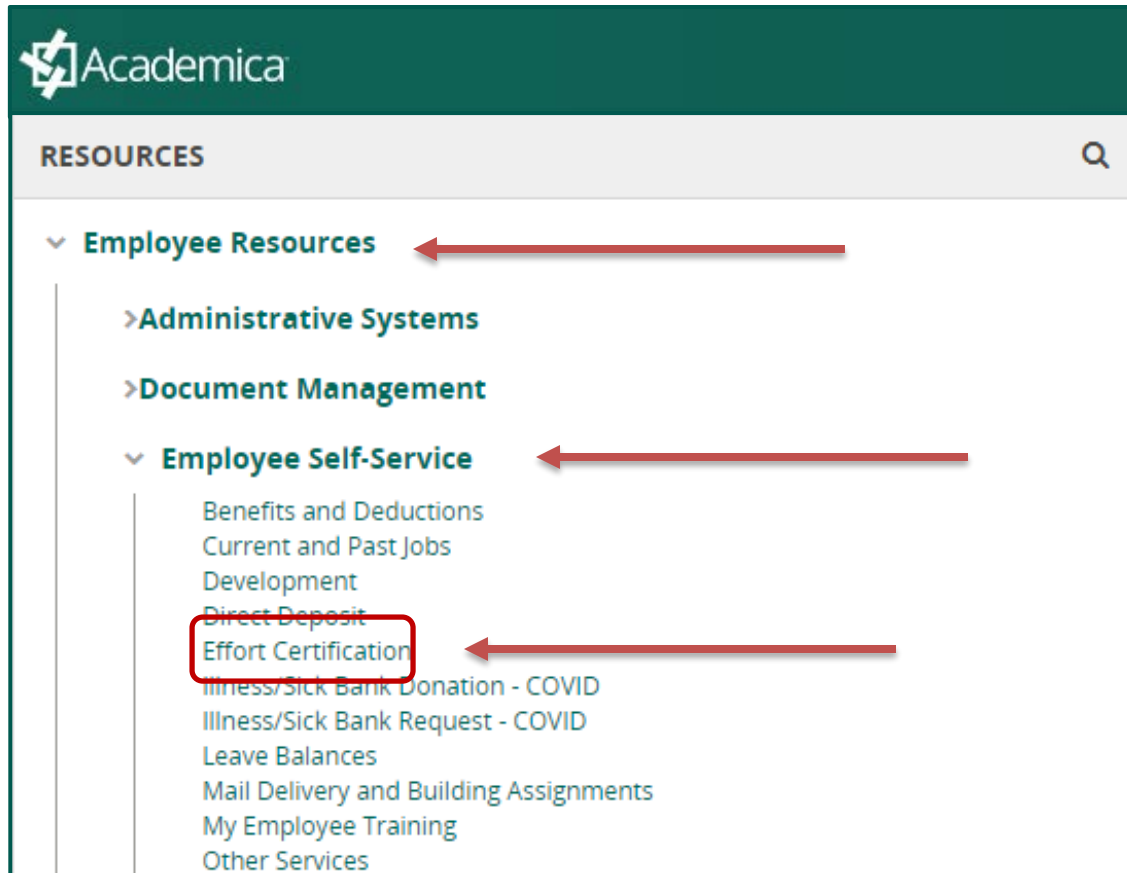
Logging In	2 – 3
Basic Pre-Review Workflow	4 – 11
Appendix A – Advanced Search	12 – 15
Appendix B – Review/Request Changes Screen	16 – 23
Appendix C – Effort Certification	24 – 36

# Login via Academica

From [login.wayne.edu](https://login.wayne.edu)

1. Enter your WSU Access ID
2. Enter password
3. Select Login

# Navigate to Effort Certification



From the Resources section:

Select Employee Resources > Employee Self-Service > Effort Certification

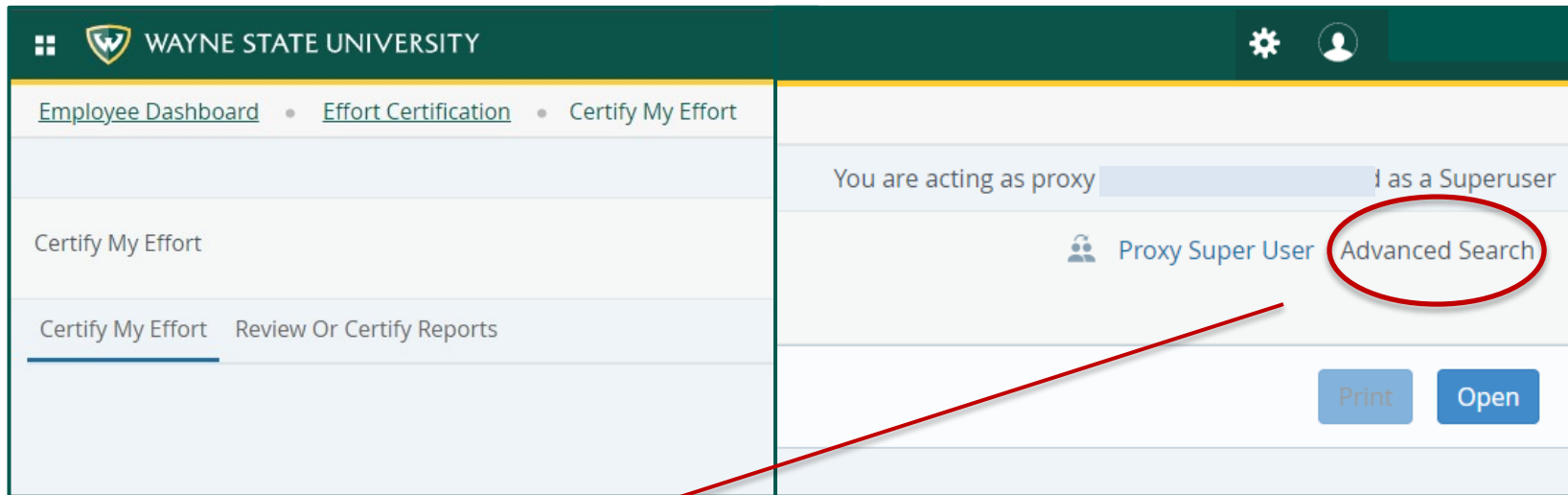
## Pre-Review – Basic Workflow



The screenshot displays the Wayne State University Employee Dashboard. At the top, the university logo and name are visible. Below the header, there is a navigation bar with three items: [Employee Dashboard](#), [Effort Certification](#), and [Certify My Effort](#). The main content area shows a list of options under the heading 'Certify My Effort'. The first option is 'Certify My Effort' with a blue underline. The second option, 'Review Or Certify Reports', is circled in red, indicating the next step in the workflow.

- Select **Review or Certify Reports**

# Pre-Review – Basic Workflow



- Click on the Advanced Search feature to find the individuals you need to review.

# Pre-Review – Basic Workflow

At a minimum, **Chart of Account Code (COA)** must be selected

Advanced Search

ID: Enter ID x

Name: Enter Name x

State: [Dropdown]

Status: [Dropdown]

Chart of Account Code: Select COA code

Effort Period Code: Select Period Code

W. Wayne State University

Select Grant Code

Clear Close **Go**

Search attributes include:

- Banner ID
- Name
- Chart of Account Code
- Effort Period Code
- State
- Status
- Grant Code

After selecting criteria, click **Go**

**NOTE:** By entering only the COA, ALL records for your review will populate

# Pre-Review – Basic Workflow

Certify My Effort Review Or Certify Reports

Effort List

COA	Period Code	Period Description	Name	ID	Start Date	End Date	Status	Unlocked/ Locked	Comments
W	12M-19-A	Jan-Jun 2019			12/09/2019	01/31/2020	Awaiting Certification	Unlocked	
W	12M-19-A	Jan-Jun 2019			12/09/2019	01/31/2020	Awaiting Certification	Unlocked	
W	12M-19-A	Jan-Jun 2019			12/09/2019	01/31/2020	Awaiting Certification	Unlocked	
W	12M-19-A	Jan-Jun 2019			12/09/2019	01/31/2020	Awaiting Certification	Unlocked	
W	12M-19-A	Jan-Jun 2019			12/09/2019	01/31/2020	Awaiting Certification	Unlocked	

Clicking a column header allows for sorting

Double-click on a record to populate the Review/Request Changes screen

# Pre-Review – Basic Workflow

The Review/Request Changes screen is then displayed for the record selected

WAYNE STATE UNIVERSITY

Employee Dashboard • Effort Certification • Effort Report

You are [User Name] a Superuser

Print

Effort Report | Pay Period Summary | Comments | Routing Queue

### Sponsored

Grant	Fund	Effort Category	Charge Type	Effort
2MSS Initiative for Maximizing Student Development Program at Wayne State University	2MSS2 NIGMS IMSD 2 R25 GM058905-18	RESEARCH	DIRECT	75

Total Sponsored Activity 75%

### Non Sponsored

Fund	Organization	Effort Category	Charge Type	Effort
111220 Medicine	06AE33 Graduate Assistants		DIRECT	25

Total Non Sponsored Activity 25%

Total : 100.00%

Request Changes | Review | Add New Funding | Save

### Effort Report Overview

#### Report Status

12G-19-A  
Jan-Jun GRA 2019  
December 09, 2019 - January 31, 2020

Under Review - Unlocked

#### Important Dates

Begin Pre-Review  
November 25, 2019  
Certification Period  
December 09, 2019 to January 31, 2020  
Post Review End

#### Pay Dates

BW - 2 December 31, 2018-January 13, 2019  
BW - 3 January 14, 2019-January 27, 2019  
BW - 4 January 28, 2019-February 10, 2019  
BW - 5 February 11, 2019-February 24, 2019  
BW - 6 February 25, 2019-March 10, 2019  
BW - 7 March 11, 2019-March 24, 2019  
BW - 8 March 25, 2019-April 07, 2019  
BW - 9 April 08, 2019-April 21, 2019  
BW - 10 April 22, 2019-May 05, 2019  
BW - 11 May 06, 2019-May 19, 2019  
BW - 12 May 20, 2019-June 02, 2019  
BW - 13 June 03, 2019-June 16, 2019  
BW - 14 June 17, 2019-June 30, 2019

### Funding Chart

Fund	Effort Category	Charge Type	Effort	Percentage
2MSS2 NIGMS IMSD 2 R25 GM058905-18	RESEARCH	DIRECT	75	75%
111220 Medicine		DIRECT	25	25%



# Pre-Review – Basic Workflow

WAYNE STATE UNIVERSITY

Employee Dashboard • Effort Certi

Review the projects, labor distributions and charge types. Based on your knowledge of who is doing what, does it look reasonable?

Print ×

Effort Report Pay Period Summary Comments Routing Queue

Sponsored

Grant	Fund	Effort Category	Charge Type	Effort
2MSS Initiative for Maximizing Student Development Program at Wayne State University	2MSS2 NIGMS IMSD 2 R25 GM058905-18	RESEARCH	DIRECT	75

Total Sponsored Activity 75%

Non Sponsored

Fund	Organization	Effort Category	Charge Type	Effort
111220 Medicine	06AE33 Graduate Assistants			25

Total Non Sponsored Activity 25%

Total : 100.00%

If the information does not look reasonable, select "Request Changes" and process the necessary Change Labor Distribution request (CLDR) if indicated

If the information looks reasonable, select "Review"

Request Changes Review Add New Funding Save

# Pre-Review – Basic Workflow

The screenshot displays the 'Effort Certification' section of an 'Employee Dashboard'. The breadcrumb trail is 'Employee Dashboard > Effort Certification > Effort Report'. A red box highlights a green checkmark and the text 'Reviewed successfully' in the top right corner. A blue box with a red border contains the text 'After clicking "Review" the status changes to "Awaiting Certification"', with red lines pointing to the 'Reviewed successfully' message and the 'Awaiting Certification - Unlocked' status in the right-hand sidebar. Another blue box with a red border on the left contains the text 'Click "Effort Certification > Review or Certify Reports" to return to the list of records remaining to be reviewed', with a red line pointing to the 'Effort Certification' breadcrumb. The main content area shows a table of records with columns for Fund, Organization, Effort Category, Charge Type, and Effort. The first row shows '290XF Lumigen End Res Enhancement Fd' under Fund, '12E1 Chemistry Administration' under Organization, 'DIRECT' under Charge Type, and '25' under Effort. Summary statistics show 'Total Sponsored Activity 75%' and 'Total Non Sponsored Activity 25%', with a 'Total : 100.00%'. At the bottom, there are buttons for 'Request Changes', 'Certify', 'Add New Funding', and 'Save'. The right sidebar includes sections for 'Effort Report Overview', 'Report Status' (12G-19-A, Jan-Jun GRA 2019, December 09, 2019 - January 31, 2020), 'Awaiting Certification - Unlocked', 'Important Dates' (Begin Pre-Review: November 25, 2019; Certification Period: December 09, 2019 to January 31, 2020; Post Review End), and 'Pay Dates' (a list of 13 bi-weekly periods from December 31, 2018 to June 16, 2019).

Employee Dashboard • Effort Certification • Effort Report

Reviewed successfully

Print

Effort Report Overview

Report Status

12G-19-A  
Jan-Jun GRA 2019  
December 09, 2019 - January 31, 2020

Awaiting Certification - Unlocked

Important Dates

Begin Pre-Review  
November 25, 2019  
Certification Period  
December 09, 2019 to January 31, 2020  
Post Review End

Pay Dates

BW - 2 December 31, 2018-January 13, 2019  
BW - 3 January 14, 2019-January 27, 2019  
BW - 4 January 28, 2019-February 10, 2019  
BW - 5 February 11, 2019-February 24, 2019  
BW - 6 February 25, 2019-March 10, 2019  
BW - 7 March 11, 2019-March 24, 2019  
BW - 8 March 25, 2019-April 07, 2019  
BW - 9 April 08, 2019-April 21, 2019  
BW - 10 April 22, 2019-May 05, 2019  
BW - 11 May 06, 2019-May 19, 2019  
BW - 12 May 20, 2019-June 02, 2019  
BW - 13 June 03, 2019-June 16, 2019

Effort Report Pay Period Summary Comments Routing Queue

Sponsored

Grant	Fund	Organization	Effort Category	Charge Type	Effort
	NIGMS IMSD 2 R25 GM058905-18		RESEARCH	DIRECT	75
	290XF Lumigen End Res Enhancement Fd	12E1 Chemistry Administration		DIRECT	25

Total Sponsored Activity 75%

Total Non Sponsored Activity 25%

Total : 100.00%

Request Changes Certify Add New Funding Save

# Pre-Review – Basic Workflow

Continue to work through the list until all have been reviewed, or “Changes” have been requested. After “Review,” the record is now eligible for certification.

Employee Dashboard • Effort Certification • Review Or Certify Reports

Certify My Effort Review Or Certify Reports

Effort List

COA	Period Code	Period Description	Name	ID	Start Date	End Date	Status	Unlocked/ Locked
W	12G-19-A	Jan-Jun GRA 2019	Aretakis, James R.	004228847	12/09/2019	01/31/2020	Awaiting Certification	Unlocked
W	12G-19-A	Jan-Jun GRA 2019	Barrabi, Cesar G.	004540159	12/09/2019	01/31/2020	Awaiting Certification	Unlocked
W	12G-19-A	Jan-Jun GRA 2019	Barraza, Ramiro	004615763	12/09/2019	01/31/2020	Awaiting Certification	Unlocked
W	12G-19-A	Jan-Jun GRA 2019	Breen, Paul M.	004176853	12/09/2019	01/31/2020	Under Review	Unlocked
W	12G-19-A	Jan-Jun GRA 2019	Brewart, Rose	004064004	12/09/2019	01/31/2020	Under Review	Unlocked
W	12G-19-A	Jan-Jun GRA 2019	Brockett, Tyler C.	004631714	12/09/2019	01/31/2020	Under Review	Unlocked
W	12G-19-A	Jan-Jun GRA 2019	Campbell, Rebecca J.	004534908	12/09/2019	01/31/2020	Under Review	Unlocked
W	12G-19-A	Jan-Jun GRA 2019	Carver, Eric N.	004429265	12/09/2019	01/31/2020	Under Review	Unlocked
W	12G-19-A	Jan-Jun GRA 2019	Dabney, Brittanie L.	003688254	12/09/2019	01/31/2020	Under Review	Unlocked

# Appendix A – Additional Information on “Advanced Search”

# Searching for Information – Advanced Search

Effective use of the Advanced Search feature can help you organize your work and find all the individuals you need to review.

The screenshot shows an 'Advanced Search' window with the following fields and controls:

- ID:** Text input field with placeholder 'Enter ID' and a clear 'x' button.
- Name:** Text input field with placeholder 'Enter Name' and a clear 'x' button.
- Chart of Account Code:** Dropdown menu with 'W' selected.
- Effort Period Code:** Dropdown menu with 'Select Period Code' selected.
- State:** Dropdown menu with 'Unlocked' selected and a clear 'x' button.
- Status:** Dropdown menu with 'Awaiting Certification' selected and a clear 'x' button.
- Grant:** Dropdown menu with 'Select Grant Code' selected.

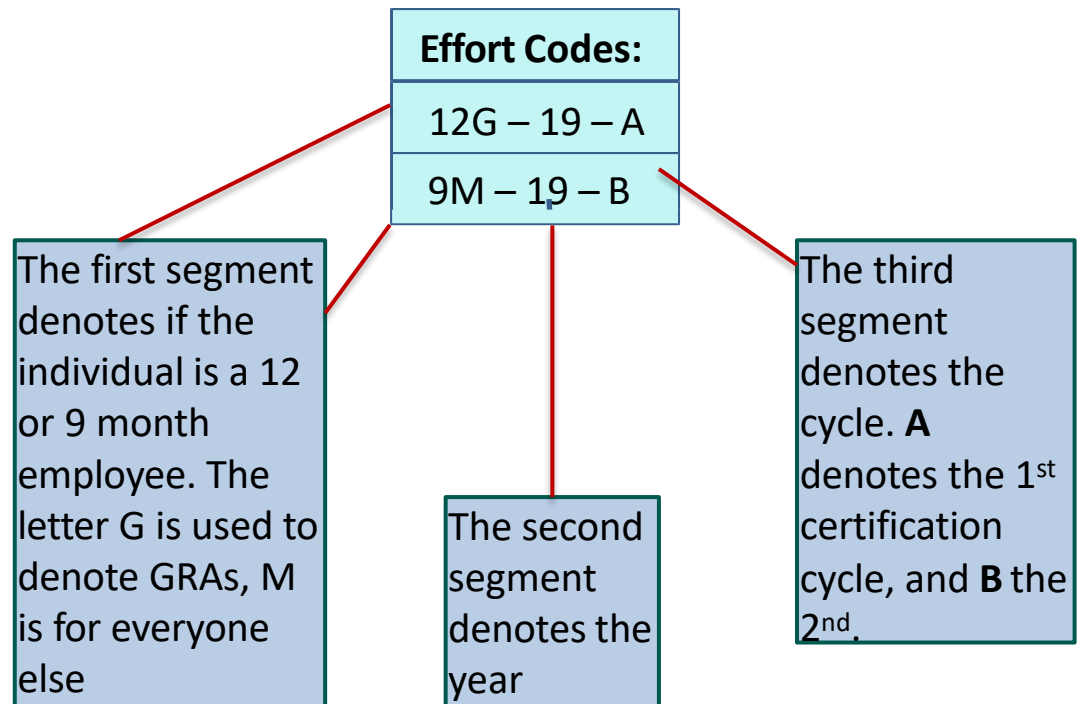
At the bottom right of the search window are three buttons: 'Clear', 'Close', and 'Go'. A red arrow points from the 'Chart of Account Code' dropdown to a callout box below.

At a minimum, "Chart of Account" must be selected, but any of the selection criteria can be used

# Searching for Information – Advanced Search

Effort Periods have been defined in the system. They are used to help organize how and when certification takes place for the various certifiers throughout WSU

Period Code	Period Description
12G-19-A	Jan-Jun GRA 2019
12G-19-A	Jan-Jun GRA 2019
12G-19-A	Jan-Jun GRA 2019
12G-19-A	Jan-Jun GRA 2019



A separate **SS** prefix is used for those with Spring/Summer sponsored activity

# Searching for Information – Advanced Search

Sorting by either the Period Code, Status, Name, etc. can be helpful in working through your pending reviews. A Cognos “Effort Reporting Status Report” will also be made available.

Certify My Effort		Review Or Certify Reports								
Effort List										
COA	Period Code	Period Description	Name	ID	Start Date	End Date	Status	Unlocked/Locked	Comments	
W	12M-19-A	Jan-Jun 2019			12/09/2019	01/31/2020	Awaiting Certification	Unlocked		
W	12M-19-A	Jan-Jun 2019			12/09/2019	01/31/2020	Awaiting Certification	Unlocked		
W	12M-19-A	Jan-Jun 2019			12/09/2019	01/31/2020	Awaiting Certification	Unlocked		
W	12M-19-A	Jan-Jun 2019			12/09/2019	01/31/2020	Awaiting Certification	Unlocked		
W	12M-19-A	Jan-Jun 2019			12/09/2019	01/31/2020	Awaiting Certification	Unlocked		

## Appendix B – Additional Information on Review/Request Changes Screen



# Additional Pre-Review Information – Fund and Labor Distribution

Labor distribution is grouped by Sponsored and Non-sponsored activity

Labor distribution is expressed in percentages and is driven by Banner payroll amount

The screenshot displays an Effort Report interface. At the top, there are navigation tabs: Effort Report, Pay Period Summary, Comments, and Routing Queue. A 'Print' button is visible in the top right. The main content is divided into two sections: 'Sponsored' and 'Non Sponsored'. The 'Sponsored' section contains a table with columns for Grant, Fund, Effort Category, Charge Type, and Effort. A single row is shown for '2MSS Initiative for Maximizing Student Development Program at Wayne State University' with a value of 75 in the Effort column. Below this table, it states 'Total Sponsored Activity 75%'. The 'Non Sponsored' section contains a table with columns for Fund, Organization, Effort Category, Charge Type, and Effort. A single row is shown for '111220 Medicine' with a value of 25 in the Effort column. Below this table, it states 'Total Non Sponsored Activity 25%'. At the bottom right, a 'Funding Chart' is shown as a pie chart with two segments: a large purple segment representing 75% (2MSS Initiative) and a smaller blue segment representing 25% (111220 Medicine). A text box at the bottom center points to the pie chart with the text: 'The Funding Chart is a graphical display of the labor distribution'. On the right side of the interface, there are several summary panels: 'Effort Report Overview', 'Report Status' (12G-19-A, Jan-Jun GRA 2019, Under Review - Unlocked), 'Important Dates' (Begin Pre-Review, Certification Period, Post Review End), and 'Pay Dates'.

Grant	Fund	Effort Category	Charge Type	Effort
2MSS Initiative for Maximizing Student Development Program at Wayne State University	2MSS2 NIGMS IMSD 2 R25 GM058905-18	RESEARCH	DIRECT	75

Fund	Organization	Effort Category	Charge Type	Effort
111220 Medicine	06AE33 Graduate Assistants		DIRECT	25

Total : 100.00%

**Funding Chart**

Fund	Percentage
2MSS Initiative for Maximizing Student Development Program	75%
111220 Medicine/99374	25%

The Funding Chart is a graphical display of the labor distribution

# Additional Pre-Review Information – Fund and Labor Distribution

The **Overview** section shows information on the period being reviewed/certified and the status of the record.

Prior to review the status will be **Under Review**. After selecting **Review**, the status changes to **Awaiting Certification**. If the **Request Changes** button is selected, the status changes to **Awaiting Review – Changes Submitted** and will remain in that status until a CLDR has been processed.

The screenshot displays the 'Effort Certification' interface for a user named 'Superuser'. The main table shows a record for '2MSS Initiative for Maximizing Student Development Program at Wayne State University' with a charge type of 'DIRECT' and an effort of 75%. Below this, a 'Non Sponsored' table shows a record for '111220 Medicine' with an effort of 25%. The total activity is 100.00%. A right-hand sidebar provides an 'Effort Report Overview' with the following details:

- Report Status:** 12G-19-A, Jan-Jun GRA 2019, December 09, 2019 - January 31, 2020. Status: Under Review - Unlocked.
- Important Dates:** Begin Pre-Review: November 25, 2019; Certification Period: December 09, 2019 to January 31, 2020; Post Review End.
- Pay Dates:** BW - 2 December 31, 2018-january 13, 2019; BW - 3 January 14, 2019-january 27, 2019; BW - 14 June 17, 2019-june 30, 2019.

A 'Funding Chart' pie chart at the bottom right shows the distribution: 75% for '2MSS, Initiative for Maximizing Student Development Program' and 25% for '111220, Medicine/99374'.

# Additional Pre-Review Information – Pay Period Summary

WAYNE STATE UNIVERSITY

Employee Dashboard • Effort Certification • Effort Report

You are [User Name] a Superuser

Print x

Effort Report | **Pay Period Summary** | Comments | Routing Queue

**Sponsored**

Grant	Fund	Effort Category	Charge Type	Effort
2MSS Initiative for Maximizing Student Development Program at Wayne State University	2MSS2 NIGMS IMSD 2 R25 GM058905-18	RESEARCH	DIRECT	75

Total Sponsored Activity 75%

**Non Sponsored**

Fund	Organization	Effort Category	Charge Type	Effort
111220 Medicine	05AE33 Graduate Assistants		DIRECT	25

Total Non Sponsored Activity 25%

Total : 100.00%

**Effort Report Overview**

**Report Status**

12G-19-A  
Jan-Jun GRA 2019  
December 09, 2019 - January 31, 2020

Under Review - Unlocked

**Important Dates**

Begin Pre-Review  
November 25, 2019  
Certification Period  
December 09, 2019 to January 31, 2020  
Post Review End

**Pay Dates**

BW - 2 December 31, 2018-january 13, 2019  
BW - 3 January 14, 2019-january 27, 2019  
BW - 14 June 17, 2019-june 30, 2019

**Funding Chart**

Category	Effort	Percentage
2MSS Initiative for Maximizing Student Development Program	75	75%
111220 Medicine/99374	25	25%

Clicking on **Pay Period Summary** provides the payroll details behind the effort percentages

# Additional Pre-Review Information – Pay Period Summary

Detail will show distributions for each pay period. Grants starting or ending in the period can result in percentages that seem unusually low. Reviewing this detail can shed light on this or other things that may cause confusion.

Organization	Grant	Fund	Effort Type	Payroll Percent	Effort Period Percent
<b>Bi-Weekly 2 2019</b> December 31, 2018 - January 13, 2019					
12E1 Chemistry Administration		290XF Lumigen End Res Enhancement Fd		25.0000	1.9231
06BB1 Physiology Administration	2MSS NIGMS RGM058905E IMSD Program at	2MSS2 NIGMS IMSD 2 R25 GM058905-18	RESEARCH Research	75.0000	5.7693
<b>Bi-Weekly 3 2019</b> January 14, 2019 - January 27, 2019					
12E1 Chemistry Administration		es Enhancement Fd		25.0002	1.9231
06BB1 Physiology Administration	2MSS NIGMS RGM058905E IMSD Program at	2MSS2 NIGMS IMSD 2 R25 GM058905-18	RESEARCH Research	74.9998	5.7692
<b>Bi-Weekly 4 2019</b> January 28, 2019 - February 10, 2019					
06BB1 Physiology Administration	2MSS NIGMS RGM058905E IMSD Program at	2MSS2 NIGMS IMSD 2 R25 GM058905-18	RESEARCH Research	74.9998	5.7692
12E1 Chemistry Administration		290XF Lumigen End Res Enhancement Fd		25.0002	1.9231

Double click to display more pay period detail

# Additional Pre-Review Information – Pay Period Detail

## Pay Period Detail



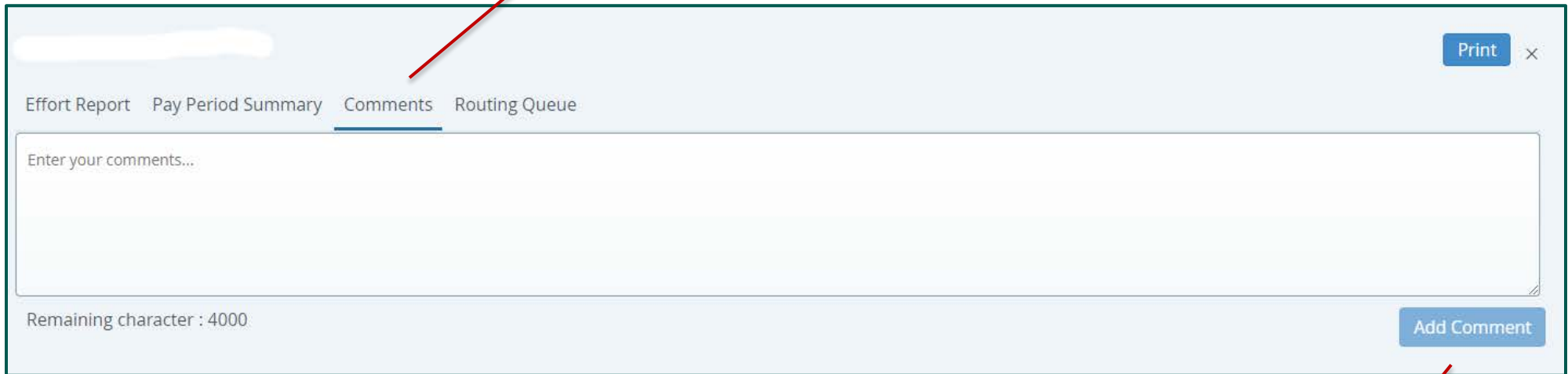
Pay Period Bi-Weekly 3 2019 January 14, 2019 - January 27, 2019

Sequence Number	Position and Suffix	Effective Date	Earning Code	Shift	COA	Index	Fund	Organization	Account	Program	Activity	Location	Percent
0	P99972-01	January 01, 2019	REG REGULAR	1	W		290XF Lumigen End Res Enhancement Fd	12E1 Chemistry Administration	61141 12 Month Graduate Assist Represente	22 Indiv/Proj Res Spons Outside Agency			25
0	P99972-01	January 01, 2019	REG REGULAR	1	W		2MSS2 NIGMS IMSD 2 R25 GM058905-18	06BB1 Physiology Administration	61141 12 Month Graduate Assist Represente	22 Indiv/Proj Res Spons Outside Agency			75

Close

## Additional Pre-Review Information – Adding a Comment

The system allows users to enter comments that may be useful in managing the review and/or certification process.



The screenshot shows a web application interface with a navigation bar at the top containing 'Effort Report', 'Pay Period Summary', 'Comments', and 'Routing Queue'. The 'Comments' tab is selected. Below the navigation bar is a large text input area with the placeholder text 'Enter your comments...'. At the bottom left of the input area, it says 'Remaining character : 4000'. At the bottom right, there is a blue button labeled 'Add Comment'. In the top right corner of the interface, there is a 'Print' button with a close icon (X).

**NOTE:** Once comments are added and saved, you cannot edit or delete them.

Enter comments and select **Add Comment** when completed

# Additional Pre-Review Information – Viewing the Routing Queue

Effort Report Pay Period Summary Comments **Routing Queue**

Mykolenko, Maria K., Acknowledge, Pre-Reviewer  
⚠ Pending  
E-mail

Phillips, Benjamin J., Review, Pre-Reviewer  
✓ Reviewed  
E-mail | December 02, 2020 at 12:57:37 PM by Foley, T

Robell, Susanne D., Acknowledge, Pre-Reviewer  
⚠ Pending  
E-mail

Chow, Christine S., Alternate Certifier  
⚠ Pending  
E-mail

Dunbar, Joseph C., Alternate Certifier  
⚠ Pending  
E-mail

Lanier, Stephen M., Alternate Certifier  
⚠ Pending  
E-mail

Barrabi, Cesar G., Certifier  
⚠ Pending  
E-mail

Add Member

Click the “Routing Queue” label. The Routing Queue contains information about individuals involved in the review and certification process, including queue member name, his/her role and current review status.

Only System Administrators can add new members to the routing queue. For example, an Alternate Certifier could be added in the event that someone is unavailable to certify his or her own report.

## Appendix C – Effort Certification



# Effort Certification – Basic Workflow (PI or Research Assistant Certifying Their Own Effort)


[Employee Dashboard](#) • [Effort Certification](#) • [Certify My Effort](#)

Certify My Effort

Certify My Effort

Administrators will not have the ability to certify. However, your PIs and Research Assistants will need your support!

COA	Period Code	Report Period	Start Date	End Date	Status	Unlocked/Locked	Comments
W	12M-19-A	Jan-Jun 2019	12/09/2019	01/31/2020	Under Review	Unlocked	
W	12M-19-B	Jul-Dec 2019	07/06/2020	09/30/2020	Awaiting Certification	Unlocked	



After logging in, the certifier (PI or research assistant) will come to this screen. It displays a summary of records that have been reviewed and are ready to be certified. Double click a record to proceed.

# Effort Certification – Basic Workflow (PI or Research Assistant Certifying Their Own Effort)

This is the effort Certification/Request Changes screen

Print x

Effort Report Pay Period Summary Comments Routing Queue

### Sponsored

Grant	Fund	Effort Category	Charge Type	Effort
25SG7 Undergraduate Student Success Initiative Project	25SG71 Kresge R-1707-269064 Undergraduate	OTHER Other Spon Activity	DIRECT	24.35

Total Sponsored Activity 24.35%

### Non Sponsored

Fund	Organization	Effort Category	Charge Type	Effort
111567 University Information Systems	25H11 Enterprise Applications		DIRECT	75.65

Total Non Sponsored Activity 75.65%

Total : 100.00%

Request Changes Certify Add New Funding Save

### Effort Report Overview

#### Report Status

12M-19-B  
Jul-Dec 2019  
July 06, 2020 - September 30, 2020

Awaiting Certification - Unlocked

#### Important Dates

Begin Pre-Review  
June 23, 2020  
Certification Period  
July 06, 2020 to September 30, 2020  
Post Review End

#### Pay Dates

BW - 15 July 01, 2019-July 14, 2019  
BW - 14 June 17, 2019-June 30, 2019  
BW - 13 June 03, 2019-June 16, 2019  
BW - 12 May 20, 2019-June 02, 2019  
BW - 11 May 06, 2019-May 19, 2019  
BW - 10 April 22, 2019-May 05, 2019

# Effort Certification – Basic Workflow (PI or Research Assistant Certifying Their Own Effort)

Review the projects, charge type and labor distribution percentages. Do they look reasonable?

The screenshot shows a software interface for effort certification. At the top, there are navigation tabs: "Effort Report", "Pay Period Summary", "Comments", and "Routing Queue". A "Print" button is visible in the top right. The main content is divided into "Sponsored" and "Non Sponsored" sections. The "Sponsored" section contains a table with columns: Grant, Fund, Effort Category, Charge Type, and Effort. A single row is visible with the following data: Grant: 25SG7 Undergraduate Student Success Initiative Project; Fund: 25SG71 Kresge R-1707-269064 Undergraduate; Effort Category: OTHER Other Spon Activity; Charge Type: DIRECT; Effort: 24.35. Below this table, it says "Total Sponsored Activity 24.35%". The "Non Sponsored" section has a table with columns: Fund, Organization, Effort Category, Charge Type, and Effort. One row is visible: Fund: 111567 University Information Systems; Organization: University Information Systems. Below this table, it says "Total Non Sponsored Activity 75.65%". At the bottom right, it says "Total : 100.00%". On the right side of the interface, there is a sidebar with sections: "Effort Report Overview", "Report Status" (12M-19-B, Jul-Dec 2019, July 06, 2020 - September 30, 2020, Awaiting Certification - Unlocked), "Important Dates" (Begin Pre-Review: June 23, 2020; Certification Period: July 06, 2020 to September 30, 2020; Post Review End), and "Pay Dates" (BW - 15 July 01, 2019-July 14, 2019; BW - 14 June 17, 2019-June 30, 2019; BW - 13 June 03, 2019-June 16, 2019; BW - 12 May 20, 2019-June 02, 2019; BW - 11 May 06, 2019-May 19, 2019; BW - 10 April 22, 2019-May 05, 2019). At the bottom of the interface, there is a row of buttons: "Request Changes", "Certify", "Add New Funding", and "Save".

If the information looks reasonable, select **Certify**

If it does not, select **Request Changes**

# Effort Certification – Basic Workflow (PI or Research Assistant Certifying Their Own Effort)

After clicking **Certify** an attestation statement appears. If appropriate, click **I Agree**. This will complete the certification and lock the record.

The screenshot shows the 'Effort Report Certification' interface. A modal dialog box titled 'Certify' is open, containing the text: 'I certify the allocation of salary to the sponsored projects listed reasonably reflects the time spent on each project for the certification period.' Below the text are two buttons: 'Cancel' and 'I Agree'. A red arrow points from the 'I Agree' button in the dialog to the text box above. Another red arrow points from the 'I Agree' button in the dialog to the 'Certify' button at the bottom of the main interface. The background interface shows a table of projects with columns for 'Project Category', 'Charge Type', and 'Effort'. The table includes rows for '25SG71 Kresge R-1707-269064 Undergraduate' and '25H11 Enterprise Applications'. Summary statistics show 'Total Sponsored Activity 24.35%' and 'Total Non Sponsored Activity 75.65%', with a 'Total : 100.00%'. The right sidebar contains sections for 'Effort Report Overview', 'Report Status', 'Important Dates', and 'Pay Dates'. At the bottom of the interface are buttons for 'Request Changes', 'Certify', 'Add New Funding', and 'Save'.

Click **Cancel** to return to the previous screen if additional consideration is needed

# Effort Certification – Basic Workflow (PI or Research Assistant Certifying Their Own Effort)

The screenshot displays a web interface for effort certification. At the top, a breadcrumb trail shows 'Employee Dashboard' > 'Effort Certification' > 'Effort Report'. A red box highlights a green checkmark and the text 'Certified Successfully' in the top right corner. A blue callout box with a red arrow pointing to the 'Effort Certification' breadcrumb contains the text: 'After certifying, the status changes to **Completed – Locked**'. Another blue callout box with a red arrow pointing to the 'Completed - Locked' status in the right-hand sidebar contains the text: 'The certification for this record is now complete. Select **Effort Certification** to see if there are other records to be certified'. The main content area is divided into 'Sponsored' and 'Non Sponsored' sections. The 'Sponsored' section has a table with columns: Grant, Fund, Effort Category, Charge Type, and Effort. It lists one record: '25SG7 Undergraduate Student Success Initiative Project' with a value of 24.35. Below this table is a summary: 'Total Sponsored Activity 24.35%'. The 'Non Sponsored' section has a similar table with one record: '111567 University Inform' with a value of 75.65. Below this is a summary: 'Total Non Sponsored Activity 75.65%'. At the bottom right, there is a 'Total : 100.00%' and a 'Save' button. The right-hand sidebar contains sections for 'Effort Report Overview', 'Report Status' (showing '12M-19-B', 'Jul-Dec 2019', and 'July 06, 2020 - September 30, 2020'), 'Important Dates' (listing 'Begin Pre-Review', 'Certification Period', and 'Post Review End'), and 'Pay Dates' (listing various dates from 2019 to 2020).

Employee Dashboard • Effort Certification • Effort Report

Effort Report Pay Period Summary Comments Routing Queue

Print x

After certifying, the status changes to **Completed – Locked**

Sponsored

Grant	Fund	Effort Category	Charge Type	Effort
25SG7 Undergraduate Student Success Initiative Project	25SG71 Kresge R-1707-269064 Undergraduate	OTHER Other Spon Activity	DIRECT	24.35

Total Sponsored Activity 24.35%

Non Sponsored

Fund	Effort Category	Charge Type	Effort
111567 University Inform		DIRECT	75.65

Total Non Sponsored Activity 75.65%

Total : 100.00%

Save

Certified Successfully

Effort Report Overview

Report Status

12M-19-B  
Jul-Dec 2019  
July 06, 2020 - September 30, 2020

Completed - Locked

Important Dates

Begin Pre-Review  
June 23, 2020  
Certification Period  
July 06, 2020 to September 30, 2020  
Post Review End

Pay Dates

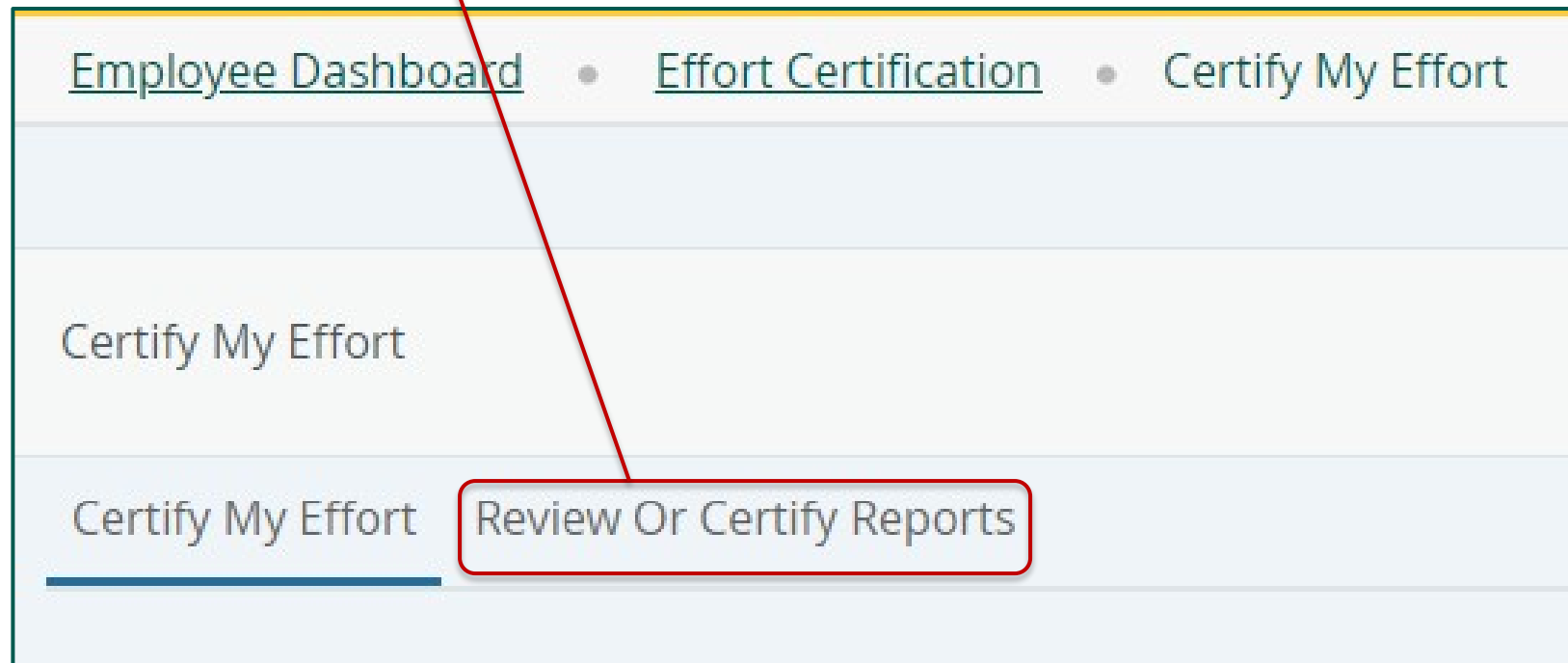
BW - 15 July 01, 2019-July 14, 2019  
BW - 14 June 17, 2019-June 30, 2019  
BW - 13 June 03, 2019-June 16, 2019  
BW - 12 May 20, 2019-June 02, 2019  
BW - 11 May 06, 2019-May 19, 2019  
BW - 10 April 23, 2019-May 05, 2019

# Effort Certification – Basic Workflow (Certifying for Graduate Assistants)

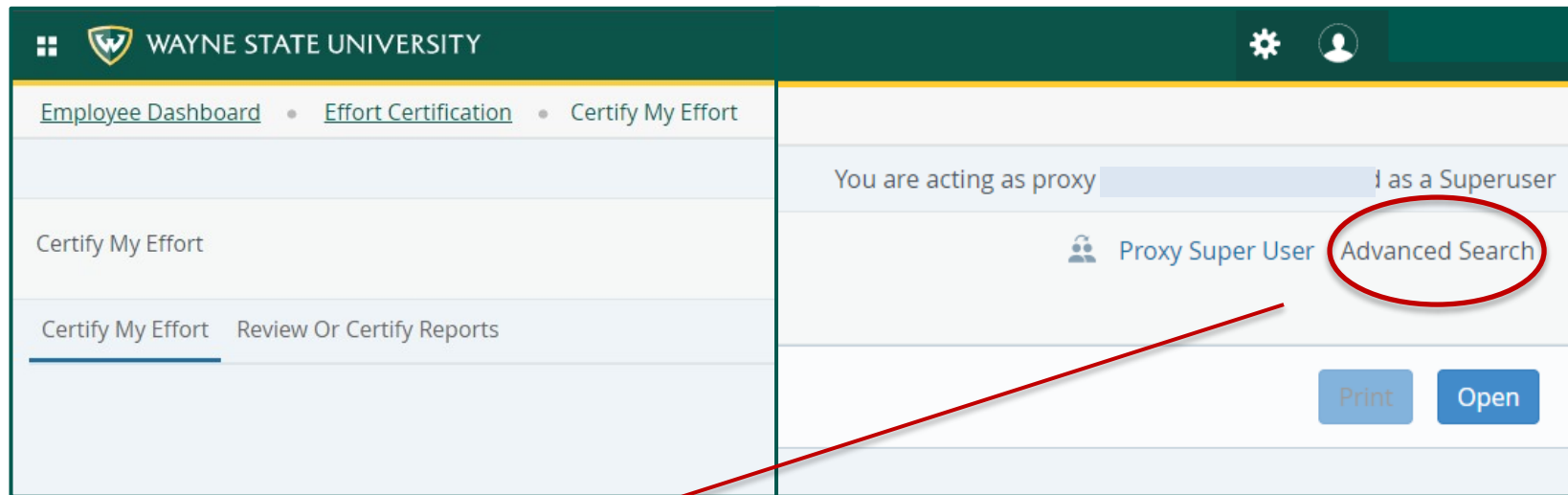
PIs are required to certify for the Graduate Assistants (GRAs).

If one or more GRA had activity for the PI during the period, the **Review or Certify Reports** label will be present.

Click **Review or Certify Reports** to proceed.



# Effort Certification – Basic Workflow (Certifying for Graduate Assistants)



- Click on the Advanced Search feature to find the GRAs you need to review.

# Effort Certification – Basic Workflow (Certifying for Graduate Assistants)

At a minimum, **Chart of Account Code W** must be selected

The screenshot shows an 'Advanced Search' window with the following fields:

- ID:** Enter ID (with a clear 'x' button)
- Name:** Enter Name (with a clear 'x' button)
- State:** A dropdown menu.
- Status:** A dropdown menu.
- Chart of Account Code:** A dropdown menu with a search icon. The option 'W, Wayne State University' is highlighted in blue. A red arrow points from the callout box above to this option.
- Effort Period Code:** Select Period Code (dropdown menu)

At the bottom right of the window are three buttons: 'Clear', 'Close', and 'Go'. The 'Go' button is circled in red, and a red arrow points from the callout box below to it.

Search attributes include:

- Banner ID
- Name
- Chart of Account Code
- Effort Period Code
- State
- Status
- Grant Code

After selecting criteria, click **Go**

**NOTE:** By entering only the COA, ALL records for your review will populate



# Effort Certification – Basic Workflow (Certifying for Graduate Assistants)

Certify My Effort [Review Or Certify Reports](#)

Effort List

COA	Period Code	Period Description	Name	ID	Start Date	End Date	Status
W	12G-19-B	Jul-Dec GRA 2019	[blurred]	[blurred]	07/06/2020	09/30/2020	Awaiting Certification
W	12G-19-B	Jul-Dec GRA 2019	[blurred]	[blurred]	07/06/2020	09/30/2020	Awaiting Certification
W	12G-19-B	Jul-Dec GRA 2019	[blurred]	[blurred]	07/06/2020	09/30/2020	Awaiting Certification
W	12G-19-B	Jul-Dec GRA 2019	[blurred]	[blurred]	07/06/2020	09/30/2020	Awaiting Certification
W	12G-19-B	Jul-Dec GRA 2019	[blurred]	[blurred]	07/06/2020	09/30/2020	Awaiting Certification

Clicking on any of the column headers allows sorting. Use the column header that will help you most easily locate your GRAs. **NOTE:** Period Codes with a **G** in the first segment are used exclusively for GRAs.

Double-click on a record to populate the Review/Request Changes screen

# Effort Certification – Basic Workflow (Certifying for Graduate Assistants)

WAYNE STATE UNIVERSITY

Review the projects and labor distribution percentages

Employee Dashboard • Effort Certification • Effort Report

Aretakis, James R. - 004228847 Print

Effort Report Pay Period Summary Comments Routing Queue

Sponsored

Grant	Fund	Effort Category	Charge Type	Effort
2MV4 Mechanisms of Non-Shine-Dalgarno Translation Initiation	2MV41 NIH/NIGMS-1R35GM124733-01 Mechanism	RESEARCH Research	DIRECT	18

Total Sponsored Activity 18%

Non Sponsored

Fund	Organization	Effort Category	Effort
111520 Graduate Awards	87G366 Graduate Scholarship Matching Funds		82

Sponsored Activity 82%

Total : 100.00%

If the information does not look reasonable, select **Request Changes**.

If the information looks reasonable, select **Certify**

Request Changes Certify Add New Funding Save

## Effort Certification – Basic Workflow (Certifying for Graduate Assistants)

Certify

I certify the allocation of salary to the sponsored projects listed reasonably reflects the time spent on each project for the certification period.

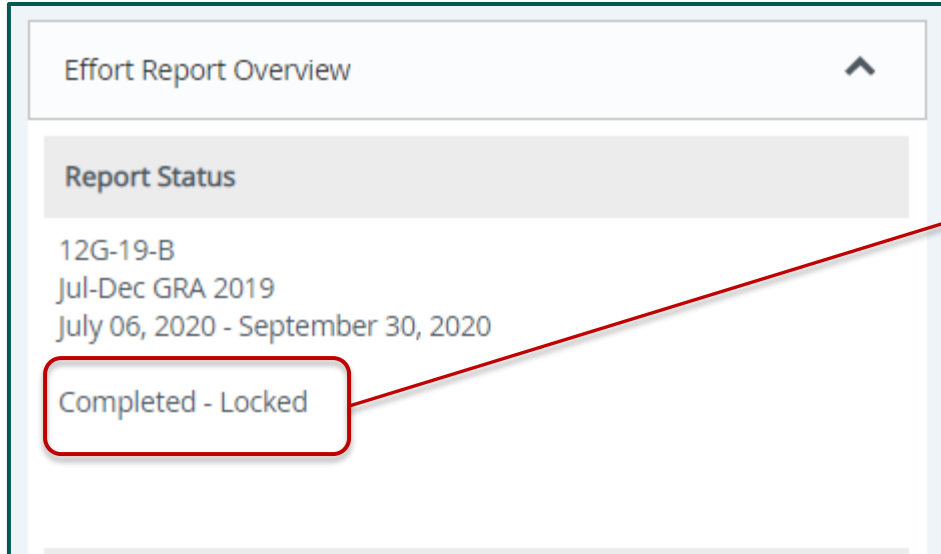
Click **Cancel** to return to the previous screen if additional consideration is needed.

Cancel I Agree

2MV41 NIH/NIGMS-1R35GM124733-01 Mechanism RESEARCH Research DIRECT 18

After clicking **Certify** an attestation statement appears. If appropriate, click **I Agree**. This will complete the certification and lock the record.

# Effort Certification – Basic Workflow (Certifying for Graduate Assistants)



Effort Report Overview

Report Status

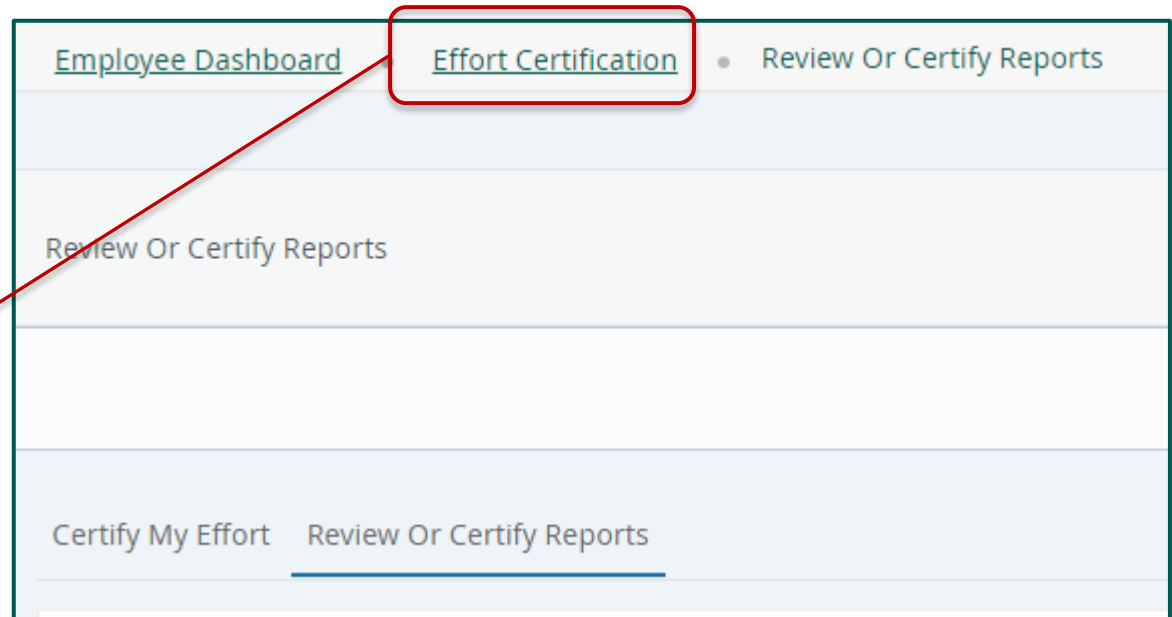
12G-19-B  
Jul-Dec GRA 2019  
July 06, 2020 - September 30, 2020

Completed - Locked

After certifying, the status changes to “Completed – Locked”

The certification for this record is now complete.

Navigate to the **Effort Certification** link to see if there are other GRAs to certify.



Employee Dashboard

**Effort Certification** • Review Or Certify Reports

Review Or Certify Reports

Certify My Effort   Review Or Certify Reports