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Login via Academica

From 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

- 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

Search attributes include:

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

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

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

After selecting criteria, click **Go**
Pre-Review – Basic Workflow

Clicking a column header allows for sorting

Double-click on a record to populate the Review/Request Changes screen
The Review/Request Changes screen is then displayed for the record selected.
Pre-Review – Basic Workflow

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

If the information looks reasonable, select “Review”

If the information does not look reasonable, select “Request Changes” and process the necessary Change Labor Distribution request (CLDR) if indicated.
Pre-Review – Basic Workflow

After clicking “Review” the status changes to “Awaiting Certification”.

Click “Effort Certification > Review or Certify Reports” to return to the list of records remaining to be reviewed.
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.
Appendix A – Additional Information on “Advanced Search”
Effective use of the Advanced Search feature can help you organize your work and find all the individuals you need to review.

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

<table>
<thead>
<tr>
<th>Period Code</th>
<th>Period Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>12G-19-A</td>
<td>Jan-Jun GRA 2019</td>
</tr>
<tr>
<td>12G-19-A</td>
<td>Jan-Jun GRA 2019</td>
</tr>
<tr>
<td>12G-19-A</td>
<td>Jan-Jun GRA 2019</td>
</tr>
<tr>
<td>12G-19-A</td>
<td>Jan-Jun GRA 2019</td>
</tr>
</tbody>
</table>

**Effort Codes:**

- **12G – 19 – A**: The first segment denotes if the individual is a 12 or 9 month employee. The letter G is used to denote GRAs, M is for everyone else.
- **9M – 19 – B**: The second segment denotes the year.
- **The third segment denotes the cycle. A denotes the 1st certification cycle, and B the 2nd.**

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.

<table>
<thead>
<tr>
<th>COA</th>
<th>Period Code</th>
<th>Period Description</th>
<th>Name</th>
<th>ID</th>
<th>Start Date</th>
<th>End Date</th>
<th>Status</th>
<th>Unlocked/Locked</th>
<th>Comments</th>
</tr>
</thead>
</table>
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 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.
Additional Pre-Review Information – Pay Period Summary

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

<table>
<thead>
<tr>
<th>Sponsored</th>
<th>Fund</th>
<th>Effort Category</th>
<th>Charge Type</th>
<th>Effort</th>
</tr>
</thead>
<tbody>
<tr>
<td>2M135 Initiative for Maximizing Student Development Program at Wayne State University</td>
<td>2M1352 NGMS MSD 2 RRU5 GM558953-1B</td>
<td>RESEARCH</td>
<td>DIRECT</td>
<td>75</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Non Sponsored</th>
<th>Organization</th>
<th>Effort Category</th>
<th>Charge Type</th>
<th>Effort</th>
</tr>
</thead>
<tbody>
<tr>
<td>111220 Medicine</td>
<td>EAE33 Graduate Assistants</td>
<td></td>
<td>DIRECT</td>
<td>25</td>
</tr>
</tbody>
</table>

Total Sponsored Activity 75%

Total Non Sponsored Activity 25%

Total: 100.00%
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.

<table>
<thead>
<tr>
<th>Bi-Weekly 2 2019  December 31, 2018 - January 13, 2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organization</td>
</tr>
<tr>
<td>---------------</td>
</tr>
<tr>
<td>12E1 Chemistry Administration</td>
</tr>
<tr>
<td>068B1 Physiology Administration</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Bi-Weekly 3 2019  January 14, 2019 - January 27, 2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organization</td>
</tr>
<tr>
<td>---------------</td>
</tr>
<tr>
<td>12E1 Chemistry Administration</td>
</tr>
<tr>
<td>068B1 Physiology Administration</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Bi-Weekly 4 2019  January 28, 2019 - February 10, 2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organization</td>
</tr>
<tr>
<td>---------------</td>
</tr>
<tr>
<td>068B1 Physiology Administration</td>
</tr>
<tr>
<td>12E1 Chemistry Administration</td>
</tr>
</tbody>
</table>
### Additional Pre-Review Information – Pay Period Detail

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

<table>
<thead>
<tr>
<th>Sequence Number</th>
<th>Position and Suffix</th>
<th>Effective Date</th>
<th>Earning Code</th>
<th>Shift</th>
<th>COA</th>
<th>Index</th>
<th>Fund</th>
<th>Organization</th>
<th>Account</th>
<th>Program</th>
<th>Activity</th>
<th>Location</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>P99972-01</td>
<td>January 01, 2019</td>
<td>REG</td>
<td>W</td>
<td></td>
<td></td>
<td>290XF Lumigen End Res Enhancement Fd</td>
<td>12E1 Chemistry Administration</td>
<td>61141 12 Month Graduate Assist Represente</td>
<td>22 Indiv/Proj Res Spons Outside Agency</td>
<td>25</td>
<td></td>
<td></td>
</tr>
<tr>
<td>0</td>
<td>P99972-01</td>
<td>January 01, 2019</td>
<td>REG</td>
<td>W</td>
<td></td>
<td></td>
<td>2M552 NiOMS IM5D 2.825 GM058905-18</td>
<td>06881 Physiology Administration</td>
<td>61141 12 Month Graduate Assist Represente</td>
<td>22 Indiv/Proj Res Spons Outside Agency</td>
<td>75</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
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.

Enter comments and select Add Comment when completed.

NOTE: Once comments are added and saved, you cannot edit or delete them.
Additional Pre-Review Information – Viewing the Routing Queue

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)

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.

Administrators will not have the ability to certify. However, your PIs and Research Assistants will need your support!
Effort Certification – Basic Workflow
(PI or Research Assistant Certifying Their Own Effort)

This is the effort Certification/Request Changes screen

<table>
<thead>
<tr>
<th>Sponsored</th>
<th>Non Sponsored</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Grant</strong></td>
<td><strong>Fund</strong></td>
</tr>
<tr>
<td></td>
<td><strong>Effort Category</strong></td>
</tr>
<tr>
<td>2SSG7 Undergraduate Student Success Initiative Project</td>
<td>2SSG71 Kresge R-1707-269064 Undergraduate</td>
</tr>
<tr>
<td>Total Sponsored Activity 24.35%</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Fund</th>
<th>Organization</th>
<th>Effort Category</th>
<th>Charge Type</th>
<th>Effort</th>
</tr>
</thead>
<tbody>
<tr>
<td>111567 University Information Systems</td>
<td>25H11 Enterprise Applications</td>
<td>DIRECT</td>
<td>75.65</td>
<td></td>
</tr>
<tr>
<td>Total Non Sponsored Activity 75.65%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Total: 100.00%

- Request Changes
- Certify
- Add New Funding
- Save
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?

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.

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)

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

The certification for this record is now complete. Select **Effort Certification** to see if there are other records to be certified.
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.
Click on the Advanced Search feature to find the GRAs you need to review.
Effort Certification – Basic Workflow (Certifying for Graduate Assistants)

Search attributes include:

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

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

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

After selecting criteria, click Go
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.
Review the projects and labor distribution percentages

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

If the information does not look reasonable, select **Request Changes**.
Effort Certification – Basic Workflow (Certifying for Graduate Assistants)

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

Click Cancel to return to the previous screen if additional consideration is needed.
Effort Certification – Basic Workflow (Certifying for Graduate Assistants)

The certification for this record is now complete.

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