Certify Effort: Employee (Costing Changes)

This section will explain how to certify effort as an employee with allocation changes.

1. Navigate to Workday
2. Go to your Workday Inbox; find and click on the appropriate Effort Certification report item; a new page will display
Review Effort Certification

**Details** (top of screen)

1. Click the > arrow next to **Details** to expand the section and view the effort report details
   
   a. **Effort Certification for** – The effort certification period
   
   b. **Total Certified Amount Estimated** – The total amount for the certification period
   
   c. **Effort Certification Status** – Will be **In Progress**
   
   d. **Changed Status** – Will be **Unchanged**

**NOTE:** See Help Text next to **Details**.
Details Tab

1. Click on the Details (tab) and scroll down to view the table
2. Click each pay period to view effort period details
   a. Grant (column)
   b. Worktags (group of columns)
      i. Payroll (column)
      ii. Costing (column)
   c. Original Amount (column)
   d. Original Percent (column)
   e. Change Reason (column)
   f. Certified Amount Estimated (column)
   g. Certified Percentage of Period Estimated (column)
To Change Effort

1. If an error or incorrect amount is found when reviewing the effort periods, you will need to change the effort.

2. To change effort, click **Change Effort** button at the bottom of the screen.
**Effort Certification Lines**

1. You will be brought to a new screen.
2. Select appropriate pay period to be changed. You will need to do one pay period at a time.
3. Select line for effort change
4. **Change Reason** (column) – Select **Effort Adjustment**. The change reason will need to be selected first before being able to make changes to the line.

---

**Effort Certification Lines**

<table>
<thead>
<tr>
<th>Grant/Project</th>
<th>Pay Period</th>
<th>Original Amount</th>
<th>Original Percent</th>
<th>Change Reason</th>
<th>Certified Amount</th>
<th>Certified Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>2,619.02</td>
<td>23.2%</td>
<td></td>
<td>2,619.02</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>813.80</td>
<td>7.2%</td>
<td></td>
<td>813.80</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>7,918.52</td>
<td>66.4%</td>
<td></td>
<td>7,918.52</td>
<td></td>
</tr>
</tbody>
</table>

---

Office of Research  
Created: March 2020  Updated: April 2022
5. **Certified Percent Estimated** (column) – Scroll right, to enter correct percentage. You will need to do this for each line an effort change is needed.

<table>
<thead>
<tr>
<th>Payroll</th>
<th>Original Amount</th>
<th>Original Percent</th>
<th>Change Reason</th>
<th>Certified Amount Estimated</th>
<th>Certified Percent Estimated</th>
<th>Order</th>
</tr>
</thead>
<tbody>
<tr>
<td>Earning: Salary Pay - Academic Employee</td>
<td>2,635.50</td>
<td>25.2%</td>
<td></td>
<td>2,628.12</td>
<td>22.1</td>
<td></td>
</tr>
<tr>
<td>Earning: Professorship Pay Employee</td>
<td>813.80</td>
<td>7.2%</td>
<td></td>
<td>813.80</td>
<td>7.2</td>
<td></td>
</tr>
<tr>
<td>Earning: Salary Pay - Academic Employee</td>
<td>7,918.52</td>
<td>69.6%</td>
<td><strong>Effort Adjustment</strong></td>
<td>7,929.90</td>
<td>69.7</td>
<td></td>
</tr>
</tbody>
</table>

**Certified Percent Estimated**: This column allows you to enter the correct percentage for each line when an effort change is needed. You can scroll right to modify this value for each row.
Effort Certification Lines/Adding new Worktag(s)

To **add** a new worktag:

1. Click the (+) for the line(s) to be updated. This is so Worktags Payroll/Costing can be transferred to the new line or row. The new line will have an amount of 0 for the **Original Amount** (column).

2. **Worktags** (column)
   a. Costing (column) – Click 3 lines in right corner of field. Worktags selection will display.
   b. Select **Worktag** by type or you may enter the name of the Worktag to be added (i.e., GRXXXXXX, Cost Center, Gift, etc.)
**Effort Certification Lines/Remove Line or Worktag(s)**

To remove line or Worktag:

1. Click (-) to remove a line or row
2. To remove Worktag(s), i.e. Grant, click on the X next to the item to be removed

<table>
<thead>
<tr>
<th>Item</th>
<th>Grant</th>
<th>Payroll</th>
<th>Costing</th>
<th>Original Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>2,639.50</td>
</tr>
</tbody>
</table>

- Employee: [Name Redacted]
- Job Profile: Associate Professor
- Pay Group: UNO - Monthly
- Position: [Name Redacted] Associate Professor
- Move (2)

- Bypass: Bypass Cost Center: [Redacted]
- Organization: Research
- Function: FND016
- Fund: [Redacted] Grants & Contracts
- Grant: [Redacted]

[Table showing item details with 'X' next to 'Grant' for removal]
Effort Certification Lines

Once you have made the allocation/costing changes for each pay period, if applicable, make sure the total certified percentage is 100% for all periods.

**Attachments** – You may upload any supporting documentation for effort changes

Click OK

<table>
<thead>
<tr>
<th>Name</th>
<th>Markings</th>
<th>Original Amount</th>
<th>Change Reason</th>
<th>Certified Amount Estimated</th>
<th>Certified Percent Estimated</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pay Period: Pay Academic</td>
<td>Job Title: Associate Professor</td>
<td>Pay Group: UN: Annually</td>
<td>Position: Professor</td>
<td>Effort Adjustment</td>
<td>2,670.80</td>
</tr>
<tr>
<td>Pay Period: Pay Academic</td>
<td>Job Title: Associate Professor</td>
<td>Pay Group: UN: Annually</td>
<td>Position: Professor</td>
<td>Effort Adjustment</td>
<td>810.80</td>
</tr>
<tr>
<td>Pay Period: Pay Academic</td>
<td>Job Title: Associate Professor</td>
<td>Pay Group: UN: Annually</td>
<td>Position: Professor</td>
<td>Effort Adjustment</td>
<td>7,916.82</td>
</tr>
<tr>
<td>Pay Period: Pay Academic</td>
<td>Job Title: Associate Professor</td>
<td>Pay Group: UN: Annually</td>
<td>Position: Professor</td>
<td>Effort Adjustment</td>
<td>11,371.82</td>
</tr>
</tbody>
</table>

**Attachments**

Drop files here

Select files
Effort Certification Survey

When an effort change is submitted, the **Effort Certification Standard Survey** is required.

Please fill out all questions. You will not be able to proceed without entering all survey answers.

Click **OK**
Effort Certification Submission

You will be brought back to the Details (tab) screen.

The **Changed Status** will now be **Changed**

1. Click the arrow next to Details at the top of the screen to expand selection and read the **2 CFR Part 200** attestation statement certifying salary has been charged according to actual effort.

2. Click **Submit**
Post Submission

Once submitted, you will receive a pop-up box displaying the next step in the effort certification process.

NOTE: When changes are made on a grant, the report will route to the grant manager, grant accountant, cost center manager, and then to the payroll partner to process the effort changes.

Success! Event submitted: Effort Certification

Up next: Approval by Grant Manager

View Details
## CHANGES/UPDATES LIST:

<table>
<thead>
<tr>
<th>Date</th>
<th>Pages Changed</th>
<th>Who made changes</th>
</tr>
</thead>
<tbody>
<tr>
<td>04-05-22</td>
<td>1-3, 11</td>
<td>Alana Coleman</td>
</tr>
</tbody>
</table>