Certify Effort: Terminated Manager (Costing Changes)

This section will explain how to certify effort for a terminated employee with allocation changes.

1. Navigate to Workday
2. The effort report for a terminated manager is routed to the cost center manager’s inbox for administrative review
3. The cost center manager will find and click on the appropriate Effort Certification report item; a new page will display

Inbox
24 items

Effort Certification: UNO Effort Certification Type for [Name] (Terminated) for ...
55 minute(s) ago - Due 12/07/2021

Effort Certification: UNO Effort Certification Type for [Name] (Retired) for 01/01/2021 - ...
55 minute(s) ago - Due 12/07/2021

Effort Certification: UNO Effort Certification Type for [Name] (Terminated) for 01/0...
55 minute(s) ago - Due 12/07/2021
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.
Summary (tab)

The Summary tab will be blank. See the next page for reviewing effort details.
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

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>Worktags</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>Payroll</td>
<td></td>
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<td></td>
</tr>
<tr>
<td>Pay Group: UNO - Monthly Position: Assistant Professor Job Profile: Associate Professor</td>
<td>813.80</td>
<td>7.2%</td>
<td></td>
<td>813.80</td>
<td>7.2%</td>
<td></td>
</tr>
<tr>
<td>Pay Group: UNO - Monthly Position: Associate Professor Job Profile: Associate Professor</td>
<td>7,918.52</td>
<td>69.6%</td>
<td>Effort Adjustment</td>
<td>7,929.50</td>
<td>69.7%</td>
<td></td>
</tr>
<tr>
<td>Pay Group: UNO - Monthly Position: Associate Professor Job Profile: Academic Professor</td>
<td>11,371.82</td>
<td>100%</td>
<td></td>
<td>11,371.82</td>
<td>100%</td>
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</tbody>
</table>
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 all 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
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
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 Summary (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.

NOTES: 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.

- If the terminated manager is also grant manager for a grant where effort is changed, this step will be bypassed.
- Since the cost center manager will be making the changes, the report will route to the grant accountant and lastly, to the payroll partner to process the effort changes.
<table>
<thead>
<tr>
<th>Date</th>
<th>Pages Changed</th>
<th>Who made changes</th>
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<tbody>
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