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
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

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>Workings</th>
<th>Original Amount</th>
<th>Original Percent</th>
<th>Change Reason</th>
<th>Certified Amount</th>
<th>Certified Percent</th>
<th>Order</th>
</tr>
</thead>
<tbody>
<tr>
<td>Payroll: Salary Pay - Academic Employee: [Name]</td>
<td>2,638.50</td>
<td>23.2%</td>
<td>-</td>
<td>2,628.12</td>
<td>23.1%</td>
<td>▼</td>
</tr>
<tr>
<td>Payroll: Professorship Pay Employee: [Name]</td>
<td>813.80</td>
<td>7.2%</td>
<td>-</td>
<td>813.80</td>
<td>7.2%</td>
<td>▲ ▼</td>
</tr>
<tr>
<td>Payroll: Salary Pay - Academic Employee: [Name]</td>
<td>7,918.52</td>
<td>69.6%</td>
<td>-</td>
<td>7,939.50</td>
<td>69.7%</td>
<td>▲ ▼</td>
</tr>
<tr>
<td>Payroll: Salary Pay - Academic Employee: [Name]</td>
<td>11,371.82</td>
<td>100%</td>
<td>-</td>
<td>11,371.82</td>
<td>100%</td>
<td>▼</td>
</tr>
<tr>
<td>Job Profile: Associate Professor Pay Group: UNO - Monthly Position: [Position]</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</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 **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**

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**Details**

Effort Certification for
07/01/2021 - 12/31/2021

Total Certified Amount Estimated
72,882.35

Total Certified Percentage Estimated
100.0%

Per 2 CFR Part 200, the university must provide reasonable assurance that salary charges are accurate, allowable, and properly allocated. Failure to comply with this requirement could lead to disallowance of salary charges to externally funded projects. Salary charged is based on actual work performed.

The verifier certifies that he/she has sufficient technical knowledge and/or is in a position that provides for suitable means of verification that the work was performed.

I certify

No

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Office of Research
Created: March 2020 | Updated: April 2022
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.
## 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>
