Certify Effort: Terminated Employee (No Costing Changes)

This section will explain how to certify effort for a terminated employee without allocation changes.

1. Navigate to **Workday**

2. The effort report for a terminated employee is routed to the <u>manager's</u> inbox for administrative review

3. The 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 ▓▓▓▓▓▓▓▓ (Terminated) for ...
55 minute(s) ago - Due 12/07/2021

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

Effort Certification: UNO Effort Certification Type for ▓▓▓▓▓▓ (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**.

> Details

Initial screen at Summary Tab will be blank. Click the arrows next to Details to expand details for the time period and attestation statement.

Click Details Tab. The Effort Certification lines for each pay period in the certification time period are listed below.

View https://www.uno.edu/research/funding/forms for more information.

Effort Certification Status
In Progress

Changed Status
Unchanged

Summary | Details | Positions | Organizations | Process History

Turn on the new tables view ⬤

Summary 1 item

| | Effort Certification Summary | | |
Worktags	Certified Amount Estimated	Certified Percentage of Group Estimated	Certified Percentage of Total Estimated
P002▮▮▮▮▮▮▮▮▮			

Effort Certification

UNO Effort Certification Type for ▮▮▮▮▮▮▮ for 01/01/2021 - 06/30/2021

Effort Certification for

01/01/2021 - 06/30/2021

Total Certified Amount Estimated

32,894.64

Total Certified Percentage Estimated

100.0%

Review Effort Certification

Summary

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

> Details

Initial screen at Summary Tab will be blank. Click the arrows next to Details to expand details for the time period and attestation statement.

Click Details Tab. The Effort Certification lines for each pay period in the certification time period are listed below.

View https://www.uno.edu/research/funding/forms for more information.

Effort Certification Status	Changed Status
In Progress	Unchanged

Summary | Details | Positions | Organizations | Process History

Turn on the new tables view

Summary 1 item

	Effort Certification Summary			
	Worktags	Certified Amount Estimated	Certified Percentage of Group Estimated	Certified Percentage of Total Estimated
P0020▮▮▮▮▮▮				

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)

Effort Cert: Terminated Employee

Positions Tab

This tab displays the position number and title for the employee.
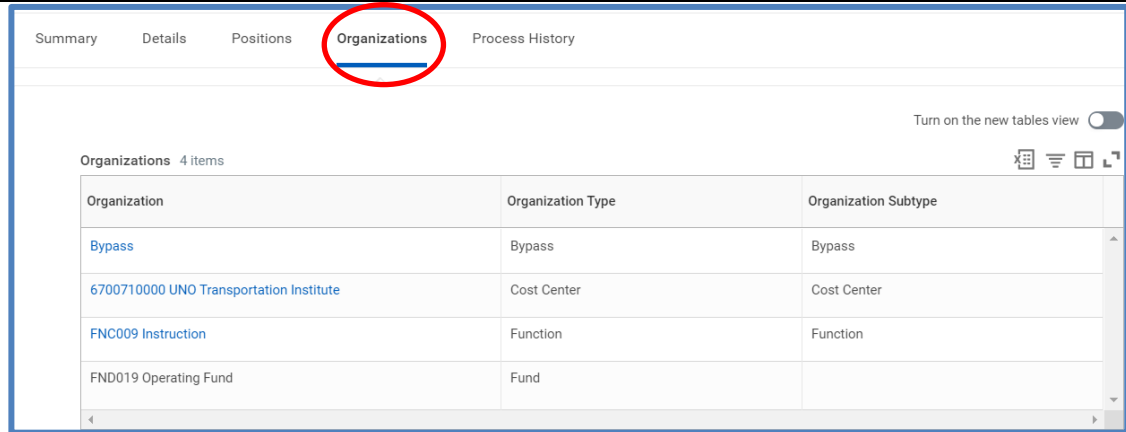
UNIVERSITY of NEW ORLEANS

Organizations & Process History Tabs

Organizations (tab)

This tab will display the employee's cost center, function, and fund. These are Worktags used for payroll and costing allocations.

Process History (tab)

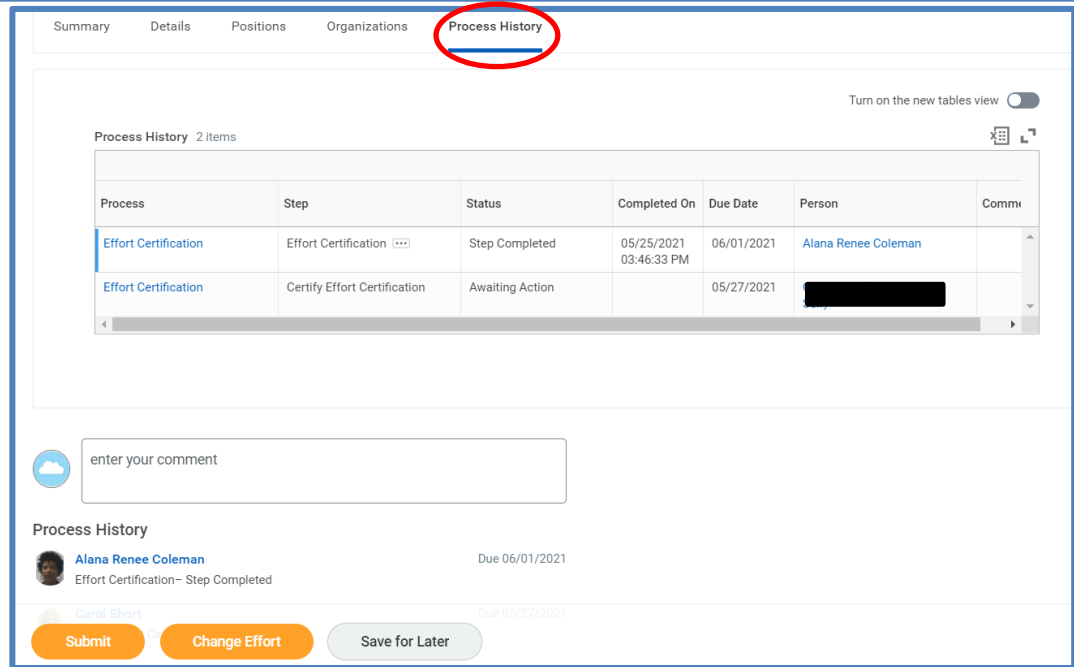This will display the historical processes the report has been through, status, and comments.

| Summary | Details | Positions | **Organizations** | Process History |

Turn on the new tables view

Organizations 4 items

Organization	Organization Type	Organization Subtype
Bypass	Bypass	Bypass
6700710000 UNO Transportation Institute	Cost Center	Cost Center
FNC009 Instruction	Function	Function
FND019 Operating Fund	Fund	

| Summary | Details | Positions | Organizations | **Process History** |

Turn on the new tables view

Process History 2 items

Process	Step	Status	Completed On	Due Date	Person	Comme
Effort Certification	Effort Certification ⋯	Step Completed	05/25/2021 03:46:33 PM	06/01/2021	Alana Renee Coleman	
Effort Certification	Certify Effort Certification	Awaiting Action		05/27/2021	▮▮▮▮	

enter your comment

Process History

Alana Renee Coleman   Due 06/01/2021
Effort Certification– Step Completed

Carol Short   Due 05/27/2021

Submit   Change Effort   Save for Later

Certifying Effort Certification

If effort on the Details tab is appropriate and no changes need to be made:

1. **Changed Status** – Should be Unchanged

2. 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

3. Click **Submit**

∨ **Details**

Effort Certification

UNO Effort Certification Type for ▮▮▮▮▮▮▮▮▮▮▮ (Terminated) for 01/01/2021 - 06/30/2021

Effort Certification for

01/01/2021 - 06/30/2021

Total Certified Amount Estimated

1,134.62

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 which is documented through the Effort Certification process. 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 certifier is attesting 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

| Summary | Details | Positions | Organizations | Process History |

Viewing: ▮▮

Submit **Change Effort** Save for Later

Initial screen at Summary Tab will be blank. Click the arrows next to Details to expand details for the time period and attestation statement.

Click Details Tab. The Effort Certification lines for each pay period in the certification time period are listed below.

View https://www.uno.edu/research/funding/forms for more information.

Effort Certification Status   Changed Status
In Progress   Unchanged

Post Submission

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

NOTE: The effort report will route to the employee's manager, and lastly, to the grant manager. If effort changes are needed, see **QRC Effort Cert: Terminated Employee Costing Changes.**

Success! Event submitted: Effort Certification

Process Successfully Completed

View Details

CHANGES/UPDATES LIST:

Date	Pages Changed	Who made changes
12-5-2024	8 (changed routing to grant mngr instead of cost center mngr	Liz Sigler