

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 their manager's inbox for administrative review
3. Their 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 [REDACTED] (Terminated) for ...
55 minute(s) ago - Due 12/07/2021

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

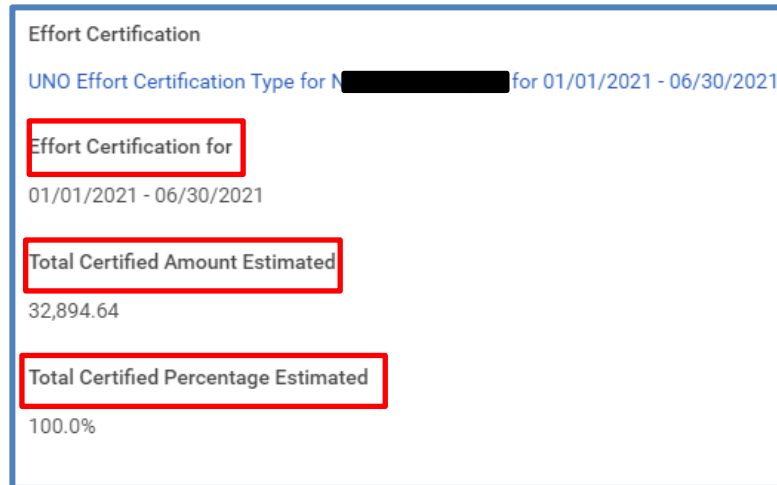
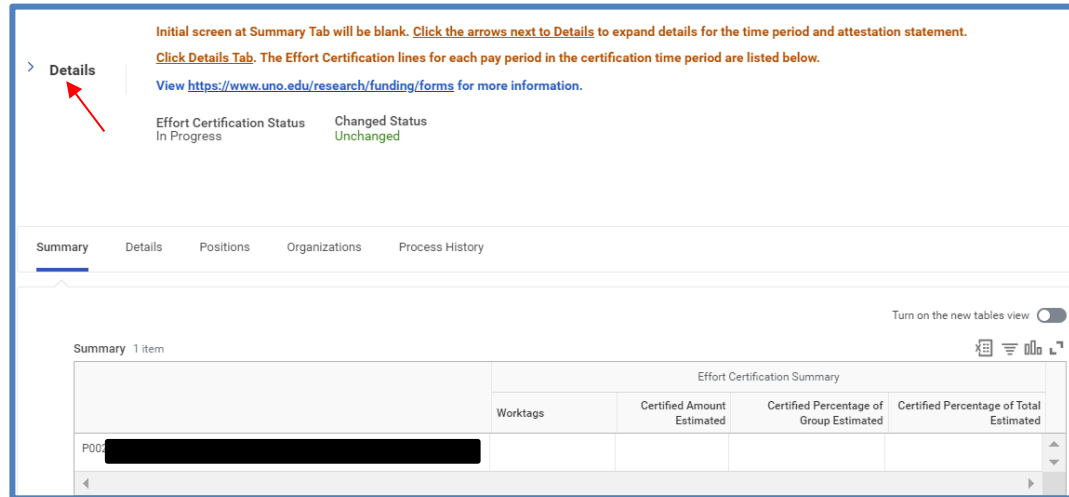
Effort Certification: UNO Effort Certification Type for [REDACTED] (Terminated) for 01/0...
55 minute(s) ago - Due 12/07/2021

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**.



Review Effort Certification

Summary (tab)

The **Summary** tab will be blank. See the next page for reviewing effort 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
P0020 [REDACTED]				

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)

Summary **Details** Positions Organizations Process History

Click here to sort

- 12/19/2020 - 01/01/2021 (Biweekly)
- 01/02/2021 - 01/15/2021 (Biweekly)
- 01/16/2021 - 01/29/2021 (Biweekly)
- 01/30/2021 - 02/12/2021 (Biweekly)

4 items

Grant	Worktags		Original Amount	Original Percent	Change Reason	Certified Amount Estimated	Certified Percent Estimated
	Payroll	Costing					
GR100 [REDACTED]	Earning: Annual Leave Pay Employee: [REDACTED] Job Profile: Specialist Pay Group: UNO - Biweekly Position: [REDACTED] Prog Admin/Asso Dir	Bypass: Bypass Location: University of New Orleans > Milneburg Hall Cost Center: [REDACTED] UNOTI Research Function: FNC016 Research Fund: FND024 Private Grants & Contracts Grant: GR [REDACTED] Location: University of New Orleans > Milneburg Hall	143.99	5.4%		143.99	5.4%
GR100 [REDACTED]	Earning: Salary Pay Employee: [REDACTED] Job Profile: Specialist Pay Group: UNO - Biweekly Position: [REDACTED] More (2)	Bypass: Bypass Location: University of New Orleans > Milneburg Hall Cost Center: [REDACTED] UNOTI Research Function: FNC016 Research Fund: FND024 Private Grants & Contracts Grant: GR100 [REDACTED] Location: University of New Orleans > Milneburg Hall	575.97	21.7%		575.97	21.7%
Total:			2,652.79	100.0%		2652.79	100.0%

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

Click here to sort

- 06/20/2020 - 07/03/2020 (Biweekly)
- 07/04/2020 - 07/17/2020 (Biweekly)
- 07/18/2020 - 07/31/2020 (Biweekly)
- 08/01/2020 - 08/14/2020 (Biweekly)

Effort Certification Lines

Period 06/20/2020 - 07/03/2020 (Biweekly)

4 items 🔍 📄 📊

Grant	Worktags		Original Amount	Original Percent	Change Reason	Certific Amou Estimate
	Payroll	Costing				
GR [REDACTED]	Earning: Salary Pay Employee: Brenda Ball Brown Job Profile: Academic Services Director Pay Group: UNO - Biweekly Position: [REDACTED] Director + More (2)	Bypass: Bypass Cost Center: 8200605000 Proj Pass, Access & Prestart Function: FNC009 Instruction Fund: FND008 Federal Grants & Contracts Grant: GR [REDACTED]	1,010.08	25.0%		1010.0

Submit
Change Effort
Save for Later

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.

Click here to sort

01/01/2021 - 01/31/2021 (Monthly)

02/01/2021 - 02/28/2021 (Monthly)

03/01/2021 - 03/31/2021 (Monthly)

04/01/2021 - 04/30/2021 (Monthly)

05/01/2021 - 05/31/2021 (Monthly)

Effort Certification Lines

Period: 02/01/2021 - 02/28/2021 (Monthly)

3 items

	Grant	Payroll	Worktags	Original Amount	Original Percent	Change Reason	Certified Amount Estimated
+		Earning: Salary Pay - Academic Employee: ██████████ Job Profile: Associate Professor Pay Group: UNO - Monthly Position: ██████████ Associate Professor More (2)	Bypass: Bypass Cost Center: 2700503000 Naval Architecture and Marine Engineering - Organized Research Function: FNC016 Research Fund: FND019 Operating Fund Location: University of New Orleans > Engineering Building	2,639.50	23.2%	[Dropdown Menu]	2,639.50
+		Earning: Professorship Pay Employee: ██████████ Job Profile: Associate Professor Pay Group: UNO - Monthly Position: ██████████ Associate Professor More (2)	Bypass: Bypass Cost Center: 2700500000 Naval Architecture and Marine Engineering Function: FNC009 Instruction Fund: FND022 Spendable Endowments Gift ██████████ Prof NAME II More (1)	813.80	7.2%	[Dropdown Menu]	813.80
+		Earning: Salary Pay - Academic Employee: ██████████ Job Profile: Associate Professor Pay Group: UNO - Monthly Position: ██████████ Associate Professor More (2)	Bypass: Bypass Cost Center: 2700500000 Naval Architecture and Marine Engineering Function: FNC009 Instruction Fund: FND019 Operating Fund Location: University of New Orleans > Engineering Building	7,918.52	69.6%	[Dropdown Menu]	7,918.52
				11,371.82	100%		11,371.82

Original Amount	Original Percent	Change Reason
2,639.50	23.2%	<div style="border: 1px solid blue; padding: 5px;"> <p style="margin: 0;">X Effort Adjustment [Menu Icon]</p> <p style="margin: 0;">Search</p> <p style="margin: 0;">← All Reason Codes</p> <p style="margin: 0; background-color: #0070C0; color: white; padding: 2px;">● Business Change / Reorganization</p> <p style="margin: 0;"><input type="radio"/> Cost Share</p> <p style="margin: 0;"><input type="radio"/> Delayed Employee Transfer</p> <p style="margin: 0; border: 2px solid red; border-radius: 50%; padding: 2px;">● Effort Adjustment</p> <p style="margin: 0;"><input type="radio"/> Hired into Incorrect Unit</p> <p style="margin: 0;"><input type="radio"/> New Research Project</p> <p style="margin: 0;"><input type="radio"/> Other Administrative</p> <p style="margin: 0;"><input type="radio"/> Salary Cap</p> </div>
813.80	7.2%	
7,918.52	69.6%	

Office of Research
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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.

Worktags		Original Amount	Original Percent	Change Reason	Certified Amount Estimated	Certified Percent Estimated	Order
Payroll	Costing						
Earning: Salary Pay - Academic Employee: ██████████ Job Profile: Associate Professor Pay Group: UNO - Monthly Position: P ██████ Associate Professor More (2)	Bypass: Bypass Cost Center: 2700503000 Naval Architecture and Marine Engineering - Organized Research Function: FNC016 Research Fund: FND019 Operating Fund Location: University of New Orleans > Engineering Building	2,639.50	23.2%	<input type="text" value="X Effort Adjustment"/>	2,628.12	<input type="text" value="23.1"/>	▼
Earning: Professorship Pay Employee: ██████████ Job Profile: Associate Professor Pay Group: UNO - Monthly Position: P ██████ Associate Professor More (2)	Bypass: Bypass Cost Center: 2700500000 Naval Architecture and Marine Engineering Function: FNC009 Instruction Fund: FND022 Spendable Endowments Gift: G ██████████ Prof NAME II More (1)	813.80	7.2%	<input type="text"/>	813.80	7.2	▲
Earning: Salary Pay - Academic Employee: ██████████ Job Profile: Associate Professor Pay Group: UNO - Monthly Position: P ██████ Associate Professor More (2)	Bypass: Bypass Cost Center: 2700500000 Naval Architecture and Marine Engineering Function: FNC009 Instruction Fund: FND019 Operating Fund Location: University of New Orleans > Engineering Building	7,918.52	69.6%	<input type="text" value="X Effort Adjustment"/>	7,929.90	<input type="text" value="69.7"/>	▲
		11,371.82	100%		11,371.82	100.0%	

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.)

4 Items

Grant	Payroll	Costing	Original Amount	Original Percent	Change Reason	Cert Am Estim
	Earning: Salary Pay - Academic Employee: [REDACTED] Job Profile: Associate Professor Pay Group: UNO - Monthly Position: P [REDACTED] Associate Professor More (2)	Bypass: Bypass Cost Center: 2700503000 Naval Architecture and Marine Engineering - Organized Research Function: FNC016 Research Fund: FND019 Operating Fund Location: University of New Orleans > Engineering Building	2,639.50	23.2%		2,639
	Earning: Salary Pay - Academic Employee: [REDACTED] Job Profile: Associate Professor Pay Group: UNO - Monthly Position: P [REDACTED] Associate Professor More (2)	<ul style="list-style-type: none"> × Bypass: Bypass ... × Cost Center: 2700503000 Naval Architecture and Marine Engineering - Organized Research ... × Function: FNC016 Research ... × Fund: FND019 Operating Fund ... × Location: University of New Orleans > Engineering Building ... 	0.00	0.0%		0

Worktag selection menu:

- Cost Centers by Cost Center Hierarchy >
- Funds >
- Gifts >
- All Active Grants >
- Location >
- Locations by Location Hierarchy >
- Programs >
- Projects by Project Group >

Search results:

- × Bypass: Bypass ...
- × Cost Center: 6700000600 Entrepreneurship & Policy Inst ...
- × Function: FNC016 Research ...
- × Fund: FND024 Private Grants & Contracts ...
- × Grant: G [REDACTED] NO- [REDACTED]

Effort Certification Lines

Period: 02/01/2021 - 02/28/2021 (Monthly)

4 Items

Search Results (10)

Grant: [REDACTED]

Grant: [REDACTED]

Grant: [REDACTED]

Search:

- × Bypass: Bypass ...
- × Cost Center: 6700000600 Entrepreneurship & Policy Inst ...
- × Function: FNC016 Research ...
- × Fund: FND024 Private Grants & Contracts ...
- × Grant: [REDACTED]

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

4 items

+	Grant	Worktags		Original Amount
		Payroll	Costing	
+		Earning: Salary Pay - Academic Employee: [REDACTED] Job Profile: Associate Professor Pay Group: UNO - Monthly Position: P [REDACTED] Associate Professor + More (2)	Bypass: Bypass Cost Center: 2700503000 Naval Architecture and Marine Engineering - Organized Research Function: FNC016 Research Fund: FND019 Operating Fund Location: University of New Orleans > Engineering Building	2,639.50
+ -		Earning: Salary Pay - Academic Employee: [REDACTED] Job Profile: Associate Professor Pay Group: UNO - Monthly Position: P [REDACTED] Associate Professor + More (2)	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> Bypass: Bypass ... <input checked="" type="checkbox"/> Cost Center: 6700000600 Entrepreneurship & Policy Inst <input checked="" type="checkbox"/> Function: FNC016 Research <input checked="" type="checkbox"/> Fund: FND024 Private Grants & Contracts <input checked="" type="checkbox"/> Grant: [REDACTED] O- 	0.00

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**

Worktags		Original Amount	Original Percent	Change Reason	Certified Amount Estimated	Certified Percent Estimated	Order
Payroll	Costing						
Earning: Salary Pay - Academic Employee: [REDACTED] Job Profile: Associate Professor Pay Group: UNO - Monthly Position: [REDACTED] Associate Professor More (2)	Bypass: Bypass Cost Center: 2700503000 Naval Architecture and Marine Engineering - Organized Research Function: FNC016 Research Fund: FND019 Operating Fund Location: University of New Orleans > Engineering Building	2,639.50	23.2%	× Effort Adjustment	2,628.12	23.1	
Earning: Professorship Pay Employee: [REDACTED] Job Profile: Associate Professor Pay Group: UNO - Monthly Position: [REDACTED] Associate Professor More (2)	Bypass: Bypass Cost Center: 2700500000 Naval Architecture and Marine Engineering Function: FNC009 Instruction Fund: FND022 Spendable Endowments Gift: [REDACTED] Prof NAME II More (1)	813.80	7.2%		813.80	7.2	
Earning: Salary Pay - Academic Employee: [REDACTED] Job Profile: Associate Professor Pay Group: UNO - Monthly Position: [REDACTED] Associate Professor More (2)	Bypass: Bypass Cost Center: 2700500000 Naval Architecture and Marine Engineering Function: FNC009 Instruction Fund: FND019 Operating Fund Location: University of New Orleans > Engineering Building	7,918.52	69.6%	× Effort Adjustment	7,929.90	69.7	
		11,371.82	100%		11,371.82	100.0%	

Attachments

Drop files here

or

Select files

OK Cancel

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**

Questions

Name Effort Certification Standard Survey

Question Why were these expenses originally charged to the cost center or grant from which they are now being transferred?

Answer

Format B I U A

Question Why should these charges be transferred to the proposed receiving sponsored project/grant, or to a university funded cost center/grant?

Answer

Question What action do you feel is required to eliminate future need for transfers of this type?

Answer

Format B I U A

Question Are you complete with all changes for this reporting period?

Answer

Format B I U A

OK

Cancel

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**

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

Details

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 Questions Process History

Summary 1 item Turn on the new tables view

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

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 Changed

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, 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.



Success! Event submitted: Effort Certification

Up next: Approval by Grant Manager [REDACTED]

[View Details](#)
