Effort Reporting System User Documentation
Effort Certification

The Research Foundation’s

EFFORT REPORTING SYSTEM
Effort Certification Module
Certifying Effort Online

Click on Help in the upper right corner of any screen if you require more detailed instructions and definitions of terms.

The Effort Reporting Certification module enables the PI to certify effort percentages for him/herself and all employees assigned to their projects. Effort may be certified from the last day of a semester to 45 days later.

After the deadline you will need to print a PAR form, sign manually and submit it to the RF Finance department. Look for this logo to print a paper form.

1.1 To Get Started

1) Select Effort Reporting from your E-Services options on the RF website, or use the link provided in the introductory email. Log on with your 3-character PI identity.

Note: You must log on to the RF Website with either a P.I. or grants officer’s User ID. You cannot access this system with a Preparer or Employee ID.

2) Select Certification.

3) Click on the drop-down arrows to choose the semester to certify. Then click Select. You can view other semesters, but you can only certify for the semester that just ended.
1.2 Screen Display of Employees

1) Filters. If you have a large number of employees, you can use the Employee Name selection button and click “Show”. Or click the check box for “Show Certification Required Only” and then click “Show”.

2) Columns Displayed.
   a) Employee: Clicking on the name will display the Certification screen, where you will certify the employee’s effort.
   b) Appointments: This is the total number of release time appointments for the employee and may include appointments on projects that are not yours.
   c) Appointments Certified: This is the total number of release time appointments for the employee that have been certified, whether or not they are your projects.
   d) My Appointments: This is the total number of appointments for the employee on your projects. In most cases this number will be the same as the “Total Appointments” number and will only differ when the employee is on multiple projects belonging to different PIs.
   e) Status: This will say “Certification Required” if you need to certify. “Done” means that your portion of the certification process is complete. Note that you may need to refresh your browser if you don’t see the latest status displayed.
   f) History: Shows the audit trail of who certified or revoked for this employee and when.

Click on Employee name to display the Effort Certification PAR screen.
1.3 Certification Screen

From the Effort Certification screen, you have the following functions:

1) **Certify Effort** for employees working on your projects. In order to confirm that the data from the Appointments module is correct, click on **Agree** in the **Confirm Effort %** column next to the effort percentages. Click on **Process** in the bottom left of the screen.

You will see a pop-up window asking for confirmation of your intent. Click **Agree** to confirm.

Rev. 3.15.18
2) **Disagree with Effort %**. Click on **Disagree** if the effort % looks incorrect. You will be able to enter a comment that will appear on reports. Click **Save**.

Click on **Process** in the bottom left of the screen. (If you only have Disagrees, you will not see the Terms and Conditions pop-up window.) It would be helpful to the Grants Office if you email them to notify them of the issue and include the Staff Effort Reference # you can see in the project detail screen below. The system will not send an automatic email.

3) **View Project Detail** of employee’s projects. Click on each project to display cost share and other project details for the semester. If some projects belong to other PIs, you will not be able to certify those, although you can view the detail. The percentages of effort displayed are from the Staff Effort Notice data entered in the Effort Reporting Appointment module.
4) **Email Addresses.** From the **Project Detail** window you can click on the ‘people’ icon to display email links for personnel involved on the project.

5) **Non-Sponsor Related Effort.** **Instruction** is the default option for the remainder of faculty effort. However, you may make any adjustments necessary for accurate reporting of **Instruction, Department Administration, Other Institutional Activity,** and **University Research** categories of effort. The total on the page must be 100% in order to process the certification.
6) **Revoke Certification.** If adjustments/additions need to be made to the Certification itself or the Staff Effort Notice after certification has been done, the certification must be revoked. Note that this button is only visible on a PAR that has been certified.