

# Workday Effort Certification

at Wellesley College

# Effort Certification Overview

The Effort Certification Report is a mechanism to verify that payroll charges on sponsored projects are reasonable in relation to project effort expressed as a percentage of total College effort.

- Faculty and exempt and non-exempt staff certify effort for themselves through the Effort Certification Report.
- Principal Investigators approve all Effort Certification Reports related to their sponsored projects.
- Certification for casual wage staff and student employees is accomplished through timesheet entry.

The Effort Reporting Policy and FAQs are available here:

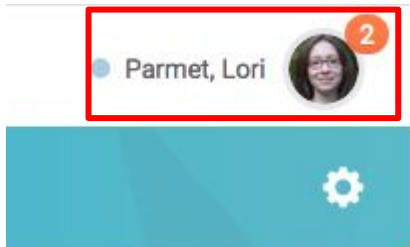
<https://www.wellesley.edu/sponsoredresearch/compliance>

# Effort Certification Review

1. Log in to Workday.
  - a. Go to <https://portal.wellesley.edu>.
  - b. Click the Workday icon in the top right-hand corner.

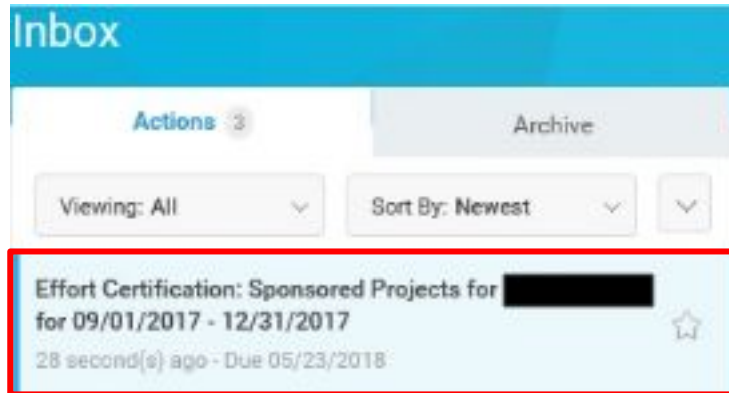


2. Access your Inbox.
  - a. Click your name in the top right-hand corner.



# Effort Certification Review

3. Select an Effort Certification Report to review.



# Effort Certification Review

- 4. Review the report header:
  - a. Covered individual's name
  - b. Effort date range

## Review Effort Certification



Sponsored Projects for [redacted] for 09/01/2017 - 12/31/2017

Effort Certification Status	Changed Status
In Progress	Unchanged

Effort Certification for 09/01/2017 - 12/31/2017



# Effort Certification Review

5. Review the *Summary* tab, which shows effort for the full period being certified:
- Grouped by grant. Non-grant activity will indicate “blank” and is listed first in the summary.

Summary   Details   Positions				
Summary 3 items				
Effort Certification Summary				
	Worktags	Certified Amount Estimated	Certified Percentage of Group Estimated	Certified Percentage of Total Estimated
[blank]	FD100 Operating		100.0%	27.5%
	Total:		100.0%	27.5%
GR26385 Boston Univ. [redacted]	FD500 Grants GR26385 Boston Univ. [redacted]		100.0%	72.5%
	Total:		100.0%	72.5%

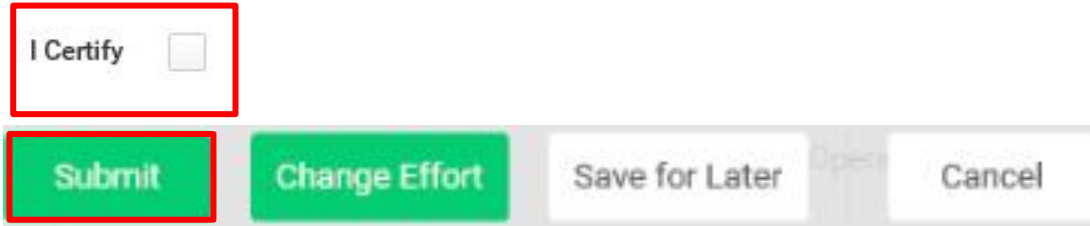
# Effort Certification Review

6. Optional - review the *Details* tab to see effort broken down by pay period:

Summary   <b>Details</b>   Positions						
Details 11 items  						
Period	Worktags		Original Amount	Original Percent	Certified Amount Estimated	Certified Percentage of Period Estimated
	Payroll	Worktags				
09/01/2017 - 09/30/2017 (Monthly)		Fund: FD100 Operating	<div></div>	100.0%	<div></div>	100.0%
			Total: <div></div>	100.0%	<div></div>	100.0%
10/01/2017 - 10/31/2017 (Monthly)		Fund: FD500 Grants	<div></div>	96.6%	<div></div>	96.6%
		Grant: GR26385 <div></div>				
		Univ <div></div>				
		<div></div>				
		Fund: FD100 Operating	<div></div>	3.4%	<div></div>	3.4%
			Total: <div></div>	100.0%	<div></div>	100.0%

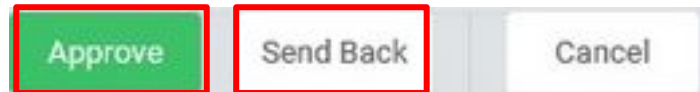
# Effort Certification Review

7. After completing the review select the appropriate action:
- When reviewing your own effort**, if no adjustments are necessary, click the **I Certify** box and then click **Submit** to complete the review.



The screenshot shows a user interface for reviewing effort. At the top, there is a box labeled "I Certify" with an unchecked checkbox, highlighted by a red rectangle. Below this, there is a row of five buttons: "Submit" (green), "Change Effort" (green), "Save for Later" (light gray), "Open" (light gray), and "Cancel" (light gray). The "Submit" button is highlighted by a red rectangle.

- When reviewing your project personnel effort**, if no adjustments are necessary, click **Approve** to complete the review or **Send Back** if the staff member must make an adjustment.



The screenshot shows a user interface for reviewing project personnel effort. It features three buttons: "Approve" (green), "Send Back" (light gray), and "Cancel" (light gray). Both the "Approve" and "Send Back" buttons are highlighted by red rectangles.



# Effort Certification Review - Making Changes

8. To make adjustments to your Effort Certification Report, click the **Change Effort** button.



# Effort Certification Review - Making Changes

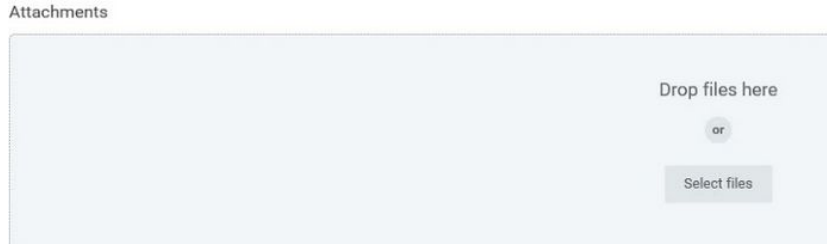
9. In the **Change Reason** column, select a reason from the dropdown menu.
10. In the **Certified Percent Estimated** column, enter the revised payroll percentages. The total for each effort period must add up to 100%. If a new Worktag is needed, contact your grant manager before completing this step.

Original Amount	Original Percent	Change Reason	Certified Percent Estimated	Certified Amount Estimated
████	100.0%	<input type="text"/>	100	████
████	100%		0.0%	████
████	96.6%	02 Effort Adjustment	80	████
████	3.4%	02 Effort Adjustment	20	████
████	100%		100.0%	████

# Effort Certification Review - Making Changes

11. Scroll down to the **Attachments** field to upload documentation for the change in PDF format.

- a. Example documentation: *I spent less time on the project than anticipated.*



12. Click **OK** to save changes or **Cancel** to discard changes.



13. After a change is saved, a revised Effort Certification Statement will appear in your Inbox. Complete steps 1-7 to review and re-submit.