

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:

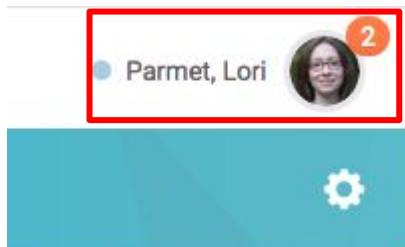
<https://www.wellesley.edu/sponsoredresearch/compliance>

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.

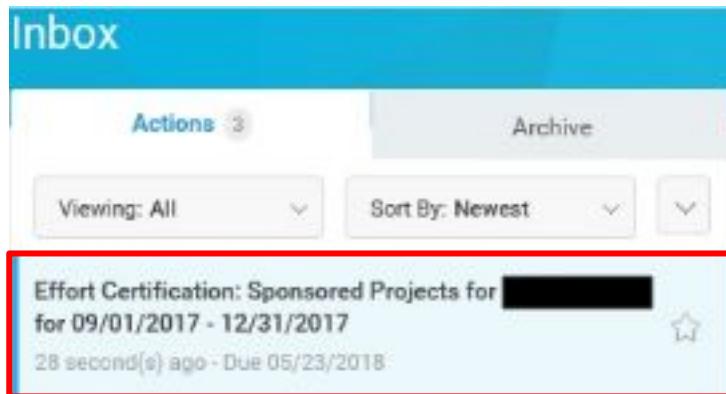


2. Access your Inbox.
 - a. Click your name in the top right-hand corner.



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:
 - a. Grouped by grant. Non-grant activity will indicate “blank” and is listed first in the summary.



The screenshot shows a table titled "Effort Certification Summary" with the following data:

Worktags	Effort Certification Summary		
	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 Details Positions

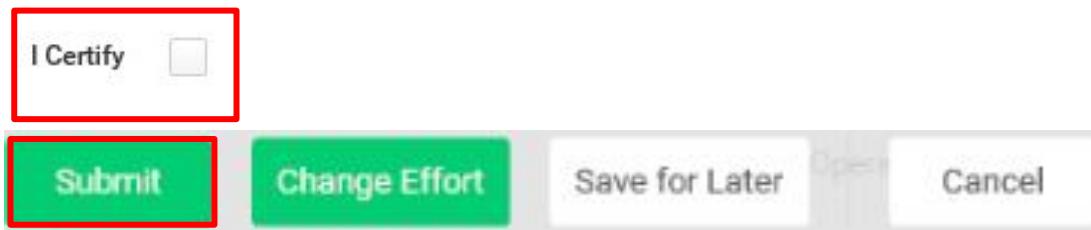
Details 11 items

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	[REDACTED]	100.0%	[REDACTED]	100.0%
			Total:	[REDACTED]	[REDACTED]	100.0%
10/01/2017 - 10/31/2017 (Monthly)		Fund: FD500 Grants Grant: GR26385 Univ [REDACTED]	[REDACTED]	96.6%	[REDACTED]	96.6%
		Fund: FD100 Operating	[REDACTED]	3.4%	[REDACTED]	3.4%
			Total:	[REDACTED]	[REDACTED]	100.0%

Effort Certification Review

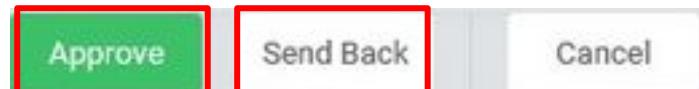
7. After completing the review select the appropriate action:

a. When reviewing your own effort, if no adjustments are necessary, click the **I Certify** box and then click **Submit** to complete the review.



A screenshot of a user interface showing four buttons: 'I Certify' (highlighted with a red box), 'Submit' (highlighted with a red box), 'Change Effort', and 'Save for Later'.

b. 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.



A screenshot of a user interface showing three buttons: 'Approve' (highlighted with a red box), 'Send Back' (highlighted with a red box), and 'Cancel'.

Effort Certification Review - Making Changes

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



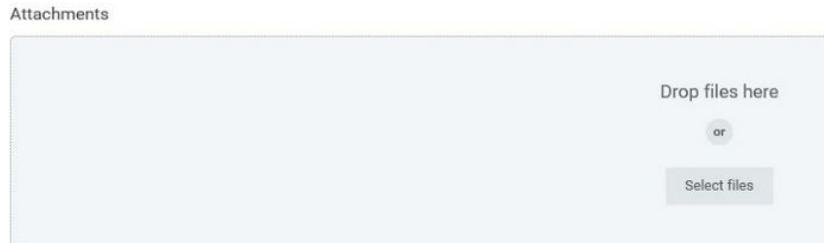
Effort Certification Review - Making Changes

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.

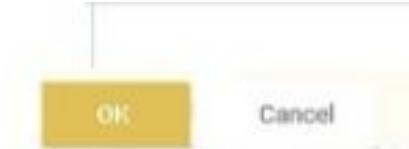
Original Amount	Original Percent	Change Reason	Certified Percent Estimated	Certified Amount Estimated
[REDACTED]	100.0%		100	[REDACTED]
[REDACTED]	100%		0.0%	[REDACTED]
[REDACTED]	96.6%	02 Effort Adjustment	80	[REDACTED]
[REDACTED]	3.4%	02 Effort Adjustment	20	[REDACTED]
[REDACTED]	100%		100.0%	[REDACTED]

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.