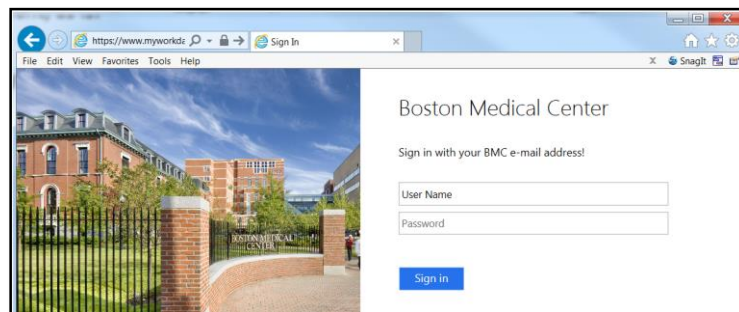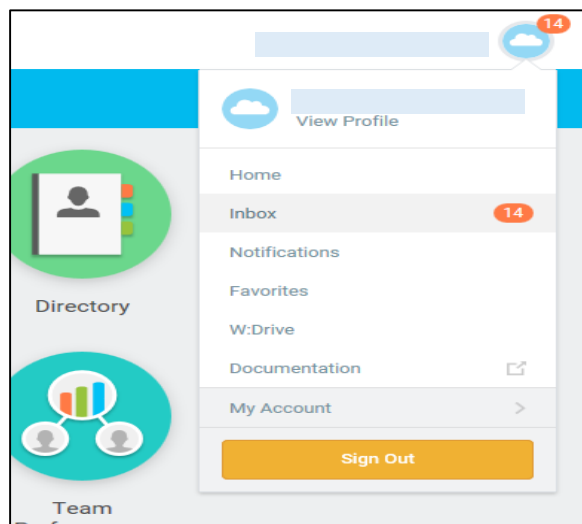# Workday Effort Certification – Effort Reviewer

The purpose of this job aid is to provide instructions regarding the review and modification of effort statements in the Workday Time and Effort System. The reports are initiated by the Effort Manager (Research Finance) and routed to the Effort Reviewer (Research Administrator) for the department. As the Effort Reviewer, you will be responsible for reviewing the effort report before the employee has the opportunity to certify. The effort certification will be available for your review, and will appear in your Workday Inbox once the process has been initiated by Research Finance. Both the Effort Reviewer and the Employee will have the opportunity to modify the report to accurately reflect where time and effort was spent across the 6-month reporting period. In the case where the effort report is already correct, simply submit the report, as is.

1. Log into Workday: https://www.myworkday.com/bmc

2. Once you have logged in, click on your name located in the upper right and choose 'Inbox' from the drop-down menu. Note orange oval with a number inside.
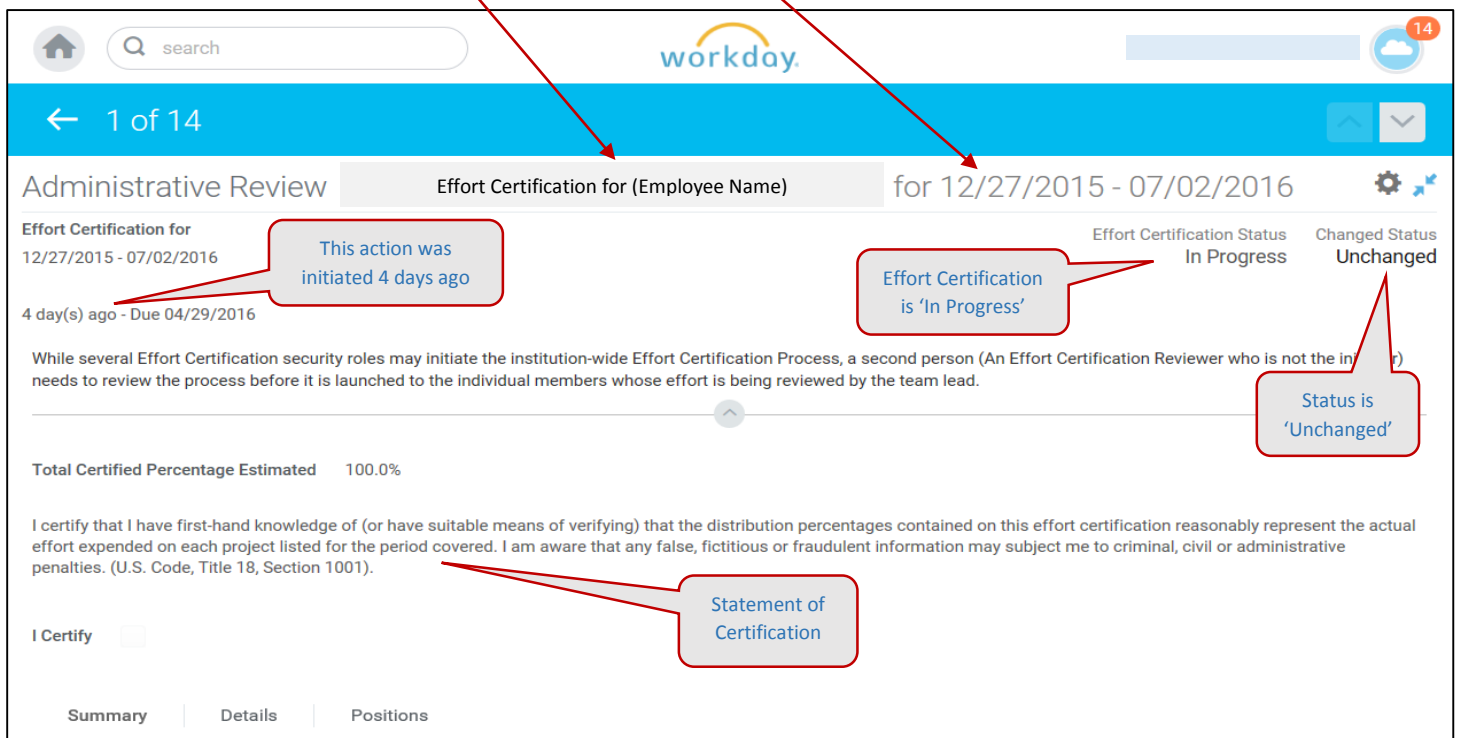
3. A list of active certifications pending your review is located on the left side of the screen. Clicking an item from the list will open it on the right side of the screen. Click the toggle icon to switch to full screen.

4. Anatomy of an Effort Certification:
   The name of the employee and certification period are located along the top of the screen.

Note: the Effort Certification Status will change to 'Submitted' once the employee certifies the statement and change to 'Certified' once the statement is approved by Research Finance. The Changed Status simply changes to 'Changed' if changes are made to the effort distribution.

5. Scroll to the middle of the screen to view the time and effort totals for the period. There are Summary, Details and Positions tabs. The Summary tab displays the cumulative percentage average for the entire certification period.

	Summary	Details	Positions

Summary 3 items

		Effort Certification Summary		
	Worktags		Certified Percentage of Group Estimated	Certified Percentage of Total Estimated
Research Grants	100.6002980.0298007 Tuberculosis Clinical Diagnostics Research Consortium (CDRC)-Administrative Core BMC Weekly		75.0%	75.0%
	100.6003541.0354102 TBRU - Biomarkers and Mechanisms of Paucibacillary and Latent Tuberculosis BMC Weekly		25.0%	25.0%
		Total:	100.0%	100.0%

6. This Details tab should be your primary focus. This tab shows every pay period contained in the certification period. Ensure that the correct cost centers and corresponding effort percentages reflect the project(s) the employee expended effort towards for the reporting period in review.

	Summary	Details	Positions

Details 12 items

Period	Worktags		Original Percent	Certified Percentage of Period Estimated
	Payroll	Costing		
12/27/2015 - 01/02/2016 (Boston Medical Weekly)	Pay Group: BMC Weekly	Cost Center: 100.6002980.0298007 Tuberculosis Clinical Diagnostics Research Consortium (CDRC)-Administrative Core	75.0%	75.0%
	Pay Group: BMC Weekly	Cost Center: 100.6003541.0354102 TBRU - Biomarkers and Mechanisms of Paucibacillary and Latent Tuberculosis	25.0%	25.0%
		Total: 100.0%		100.0%
01/03/2016 - 01/09/2016 (Boston Medical Weekly)	Pay Group: BMC Weekly	Cost Center: 100.6002980.0298007 Tuberculosis Clinical Diagnostics Research Consortium (CDRC)-Administrative Core	75.0%	75.0%
	Pay Group: BMC Weekly	Cost Center: 100.6003541.0354102 TBRU - Biomarkers and Mechanisms of Paucibacillary and Latent Tuberculosis	25.0%	25.0%
		Total: 100.0%		100.0%
01/10/2016 - 01/16/2016 (Boston Medical Weekly)	Pay Group: BMC Weekly	Cost Center: 100.6003541.0354102 TBRU - Biomarkers and Mechanisms of Paucibacillary and Latent Tuberculosis	25.0%	25.0%
	Pay Group: BMC Weekly	Cost Center: 100.6002980.0298007 Tuberculosis Clinical Diagnostics Research Consortium (CDRC)-Administrative Core	75.0%	75.0%
		Total: 100.0%		100.0%
01/17/2016 - 01/23/2016 (Boston Medical Weekly)	Pay Group: BMC Weekly	Cost Center: 100.6002980.0298007 Tuberculosis Clinical Diagnostics Research Consortium (CDRC)-Administrative Core	75.0%	75.0%
	Pay Group: BMC Weekly	Cost Center: 100.6003541.0354102 TBRU - Biomarkers and Mechanisms of Paucibacillary and Latent Tuberculosis	25.0%	25.0%
		Total: 100.0%		100.0%

Note: for the purposes of this work aid, we have only included four pay periods. During the semi-annual effort certification period, you will be reviewing 26 weekly pay periods.

7. Positions tab:

Summary	Details	Positions		

Positions 1 items

Position	FTE
50150124 Research Study Coordinator - Sandra	100%

8. *Scroll to the bottom of the screen to view the 'Process History' and a field used to enter comments. Please keep in mind that these comments will be permanently attached to this record and reviewable during routine audits. This field should only be used to aid downstream certifiers and reviewers to understand the reasoning behind modifications to the original effort statement.*

In this example, we see that the certification is awaiting 'Administrative Review' which means it is ready for review by the Effort Reviewer assigned to the employee.

Note: the first step in the process will always state 'Effort Certification – Step Completed'. This simply indicates that Research Finance has initiated the Effort Certification process. This does not mean that the statement has been certified, only that the certification has been initiated and is now ready for your review.

enter your comment

Process History

Kalina Mathurin   - Due 06/15/2016
Effort Certification- Step Completed

Effort Reviewer   - Due 04/29/2016
Administrative Review- Awaiting Action

[Submit]   [Change Effort]   [Save for Later]   [Cancel]

Scenario 1: NO CHANGES ARE REQUIRED

The following steps will explain how to submit an Effort Certification exactly how it is stated, i.e., without any changes.

1. If the effort statement is correct and ready for the employee's review, simply click 'Submit' and it will be automatically routed to the employee.

2. The following screen will appear showing that you successfully submitted the report.
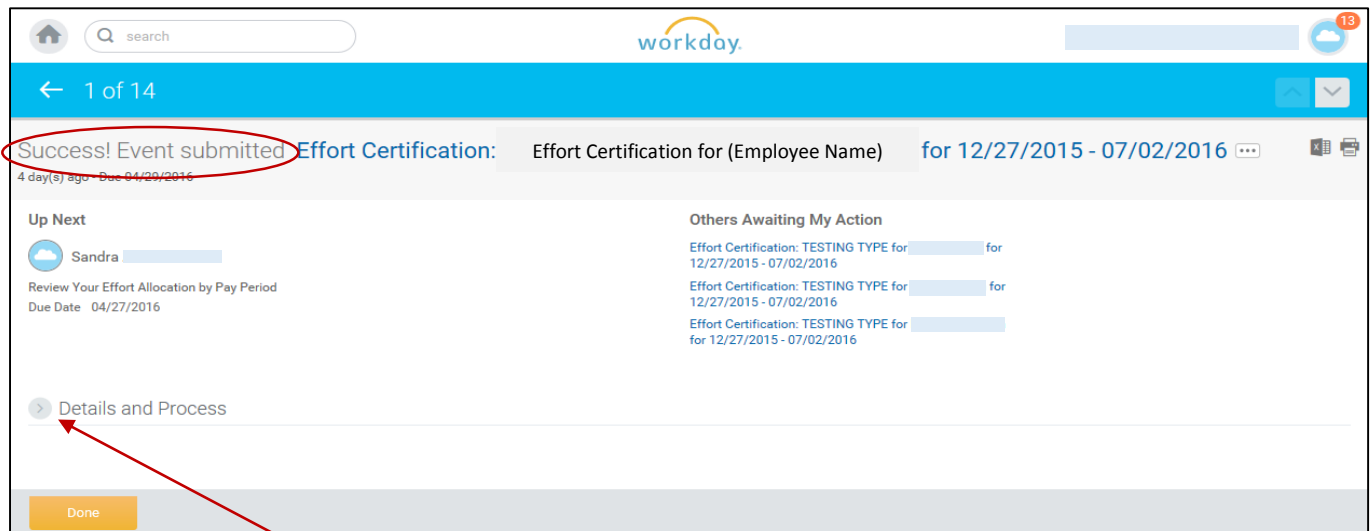
3. Clicking 'Details and Process' will show you exactly where the Effort Certification is in the business process and who is up next. Click 'Done' at the bottom-left of the screen to return to the home menu.

Process	Step	Status	Completed On	Due Date	Person	Comment
Effort Certification	Effort Certification	Step Completed	04/15/2016 10:44:41 AM	06/15/2016	Kalina Mathurin	
Effort Certification	Administrative Review	Submitted	04/20/2016 08:24:24 AM	04/29/2016	(Effort Certification Reviewer)	
Effort Certification	Review Your Effort Allocation by Pay Period	Awaiting Action		04/27/2016	Sandra (Employee As Self)	

Note: If no changes are made by the employee, the Effort Certification will automatically route to Research Finance for final review.

Scenario 2: **REALLOCATING EFFORT PERCENTAGES BETWEEN EXISTING LINES**

The following steps will explain how to redistribute percentages of effort across cost centers that are already included on the Effort Certification

1. In this example, starting with the Details screen, we see that this is an employee whose time is allocated between two cost centers; 70% attributed to one cost center and 30% to the other. Let's assume that these percentages should have been assigned in the reverse order.

Period	Worktags		Original Percent	Certified Percentage of Period Estimated
	Payroll	**Costing**		
12/27/2015 - 01/02/2016 (Boston Medical Weekly)	Pay Group: BMC Weekly	Cost Center: 100.6003351.0335104 Intensive Models of HCV Care for Injection Drug Users	30.0%	30.0%
	Pay Group: BMC Weekly	Cost Center: 100.6003235.0323501 Simulation Modeling to Improve HIV/HCV Screening, Treatment & Care	70.0%	70.0%
			Total: 100.0%	100.0%
01/03/2016 - 01/09/2016 (Boston Medical Weekly)	Pay Group: BMC Weekly	Cost Center: 100.6003351.0335104 Intensive Models of HCV Care for Injection Drug Users	30.0%	30.0%
	Pay Group: BMC Weekly	Cost Center: 100.6003235.0323501 Simulation Modeling to Improve HIV/HCV Screening, Treatment & Care	70.0%	70.0%
			Total: 100.0%	100.0%
01/10/2016 - 01/16/2016 (Boston Medical Weekly)	Pay Group: BMC Weekly	Cost Center: 100.6003351.0335104 Intensive Models of HCV Care for Injection Drug Users	30.0%	30.0%
	Pay Group: BMC Weekly	Cost Center: 100.6003235.0323501 Simulation Modeling to Improve HIV/HCV Screening, Treatment & Care	70.0%	70.0%
			Total: 100.0%	100.0%
01/17/2016 - 01/23/2016 (Boston Medical Weekly)	Pay Group: BMC Weekly	Cost Center: 100.6003235.0323501 Simulation Modeling to Improve HIV/HCV Screening, Treatment & Care	70.0%	70.0%
	Pay Group: BMC Weekly	Cost Center: 100.6003351.0335104 Intensive Models of HCV Care for Injection Drug Users	30.0%	30.0%
			Total: 100.0%	100.0%

Summary | Details | Positions

Details 12 items

Submit   Change Effort   Save for Later   Cancel

2. Click 'Change Effort' in the bottom-left corner to begin the process

3. You should now see a new column titled, 'Change Reason' with blank fields in each row.

4. Click the cursor in the blank field. Click the icon to the right of the field and a drop down menu will appear. Choose 'All Reason Codes' and then select the appropriate reason code (i.e. 05 Effort Adjustment) .

Note: this will need to be repeated for each pay period and cost center that require adjustment.

5. The field boxes are now editable in the column titled, 'Certified Percent Effort'. This is where we will make changes to the effort distributions. The numbers always default to the original percentage amounts.

Change Reason	Certified Percent Estimated
05 Effort Adjustment	70
05 Effort Adjustment	30
	100

6. Change the effort % on each line and verify that the total at the bottom of the column still sums to 100%

7. When you are satisfied with the changes, click 'OK' at the bottom-left of the screen.

8. You will now notice two things: 1) the Changed Status is now 'Changed', and 2) the Summary percentages have changed to reflect the changes made to the Details

9. Before you can submit this changed statement you must write a short description explaining any changes. Click on the tab titled, 'Questions'

10. The field box is used to explain how changes to effort benefit the project(s). Use the toggle icon to open a larger window.

Enter the justification for the modification in the 'Answer' field.

Summary | Details | Positions | **Questions**

Name   Effort Change Questionnaire

Question   Explain how changes to effort benefit the project(s)?

Answer * Normal | **B** *I* <u>U</u> ⸸/ ☰ ✎

The percentages were entered incorrectly and now reflect where the employee expended time and effort for the period in question. In the future, a master log of allocation percentages will be maintained and cross-referenced before entering anything into the time and effort sytem.

Submit   Change Effort   Save for Later   Cancel

11. If the effort statement and justification is correct and ready for the employee's review, click 'Submit' and it will be automatically routed to the employee.

12. The following screen will appear showing that you successfully submitted the report. Click on Details and Process to see routing information. Note that your Inbox count went down by one.

13. We see below that the Employee is the next person to act:

Process	Step	Status	Completed On	Due Date	Person	Comment
Effort Certification	Effort Certification	Step Completed	04/15/2016 10:44:38 AM	06/15/2016	Kalina Mathurin	
Effort Certification	Administrative Review	Submitted	04/20/2016 12:19:22 PM	04/29/2016	(Effort Certification Reviewer)	
Effort Certification	Review Your Effort Allocation by Pay Period	Awaiting Action		04/27/2016	Jake (Employee As Self)	

14. Once you submit a statement you will notice that it moves from your 'Actions' inbox to your 'Archive' inbox

SCENARIO 3: ADDING/REMOVING A COST CENTER

The following steps will explain how to add a cost center that is not already included on the effort statement and redistributing effort across the cost centers.

Navigate to the inbox
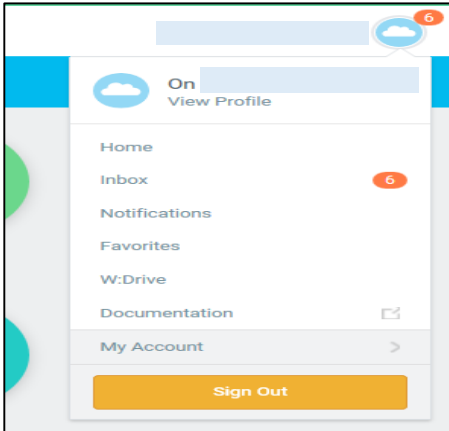
1. Choose the effort statement that you want to change and click 'Change Effort' located on the bottom-left of the screen

2. To add a line, you must copy an existing line and then change the information contained in that line. Click on the '+' sign located on the left side of an existing row.

3. You should now see two of the same line. Click the 'X' to the left of 'Cost Center' in the Costing column to remove the duplicate cost center

4. Type the cost center that you want to add in the blank field and press enter. The cost center format in Workday is: Company/AU/Activity in the following format: 123.6001234.0123401. From the drop down menu that appears, click the check-box next to the cost center that you want to add.

5. Click the cursor anywhere outside of the dropdown box to choose the selected cost center.

    Place the cursor in the 'Change Reason' field and click the icon to the right side of the field box.

6. A drop down menu will appear. Choose 'All Reason Codes' and then select the appropriate reason code (i.e. 05 Effort Adjustment) .

Note: this will need to be repeated for each pay period and cost center that require adjustment.

7. You will notice that there is now a field available to add a percentage to the new line.

8. Enter "50" in the Certified Percent Estimated column for the new row and then click in the Change Reason field of the existing line. Note that the total percentage is temporarily "150" (it must be 100 before submitting).

9. Enter Administrative Correction and "50" into the empty fields in the existing line and then click the cursor anywhere to refresh the total. You should now see that the total is the desired 100%

Note: if you need to remove an existing line, enter "0" in the Certified Percent Estimated field

10. Click 'Ok' on the bottom-left of the screen when finished making changes

11. Note in the upper-right of the screen that the 'Changed Status' now reads 'Changed'.

12. Before you can submit a changed effort statement you must write a short description regarding the changes. Click on the tab titled, 'Questions'. The field box is used to explain how changes to effort benefit the project(s). Use the toggle icon to open a larger window.

13. Enter the justification for the modification in the 'Answer' field and click 'Done'.

14. If you are satisfied with the justification, click 'Submit' in the lower-left corner and the effort statement will be automatically routed to the employee for their review and certification.

15. The following screen will appear showing that you successfully submitted the report. Click 'Done' to return to the home menu.

16. Once you submit a report you will notice that it moves from your 'Actions' inbox to your 'Archive' inbox

Inbox

Actions 95	Archive 19

Sort By: Newest

From Last 30 Days