

# EFFORT CERTIFICATION QUICK REFERENCE

STEP-BY-STEP GUIDE

## PURPOSE

When the **Effort Certification Business Process** is triggered within Workday, an 'Effort Certification' task is sent to the inbox of all *active employees* selected as working on grants. *Note: The Effort Certification inbox task is not sent to student workers.*

Once the employee completes the 'Review Effort Certification' task certifying their time, an 'Administrative Review' task is sent to the **Lead Principle Investigator (L.P.I.)** for review and submission; and lastly to the **Grant Manager** for final review and approval.

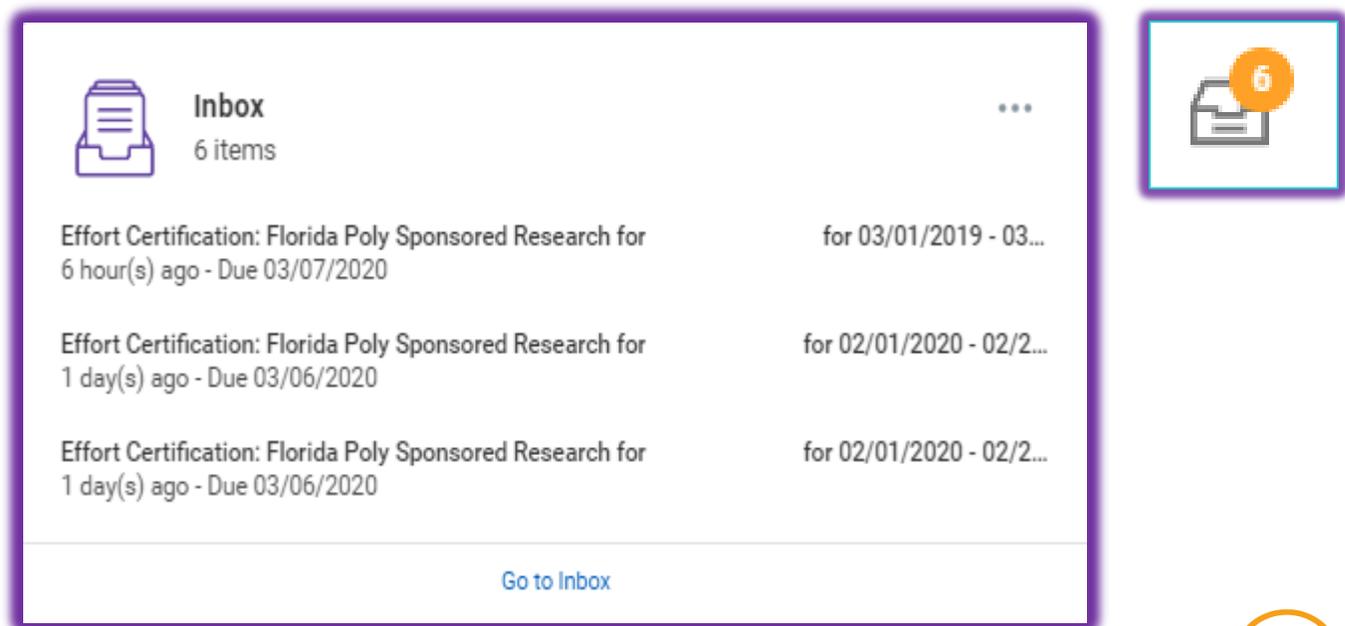
## THE HOW TO

### 'Review Effort Certification' Task (Worker)

**Step 1:** Login to Workday

**Step 2:** On the Welcome page navigate to either the '**Inbox**' section or the '**Inbox**' icon in the upper right of the screen.

**Step 3:** Open the '**Effort Certification**' task.



The screenshot displays the Workday inbox interface. On the left, there is an 'Inbox' header with a folder icon and '6 items'. Below this, three task entries are listed, each with a title, a timestamp, and a due date. On the right side of the screenshot, there is a separate icon representing the inbox with a notification badge showing the number '6'. At the bottom of the inbox list, there is a 'Go to Inbox' link.

Task Title	Timestamp	Due Date
Effort Certification: Florida Poly Sponsored Research for	6 hour(s) ago	Due 03/07/2020
Effort Certification: Florida Poly Sponsored Research for	1 day(s) ago	Due 03/06/2020
Effort Certification: Florida Poly Sponsored Research for	1 day(s) ago	Due 03/06/2020

\* **Step 4.1:** Review and select the **'I certify'** check box to certify you agree with the amounts displayed and then select the **'Submit'** button.

### Review Effort Certification

Florida Poly Sponsored Research for 02/01/2020 - 02/28/2020

Effort Certification for 02/01/2020 - 02/28/2020  
6 day(s) ago - Due 03/06/2020

Effort Certification Status: In Progress    Changed Status: Unchanged

Total Certified Amount Estimated: 4,500.00  
Total Certified Percentage Estimated: 100.0%

I certify I have firsthand knowledge (or have suitable means of verifying) that the changes to the distribution percentages reasonably represent the actual effort expended on each project listed for the period covered. I am aware that any false, fictitious, or fraudulent information may subject me to criminal, civil, or administrative penalties. (U.S. Code, Title 18, Section 1001)

**I Certify**

Summary    Details    Positions

Summary 3 items

Effort Certification Summary				
	Worktags	Certified Amount Estimated	Certified Percentage of Group Estimated	Certified Percentage of Total Estimated
1020 FIPR Institute	1020 FIPR Institute 102 FIPR 2200 Individual or Project Research Administration CIP	3,600.00	80.0%	80.0%
	1020 FIPR Institute 14.2101 Mining and Mineral Engineering 203 Sponsored Programs 2200 Individual or Project Research GR	450.00	10.0%	10.0%
	1020 FIPR Institute 102 FIPR 14.2101 Mining and Mineral Engineering 2200 Individual or Project Research GR	450.00	10.0%	10.0%
<b>Total:</b>		<b>4,500.00</b>	<b>100.0%</b>	<b>100.0%</b>

**Step 4.2:**  
(optional)

If you need to make changes prior to submission, select the **'Change Effort'** button to apply adjustments as needed and then select **'OK'**.

- The total *'Certified Percent Estimated'* must equal 100%
- Under column *'Change Reason'*, select *'Effort Certification Adjustment'*

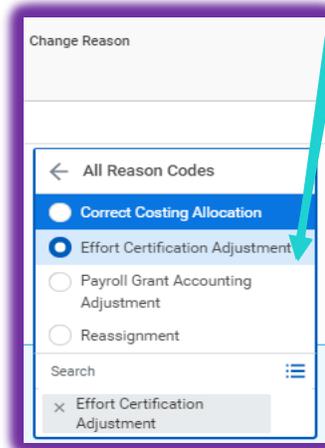
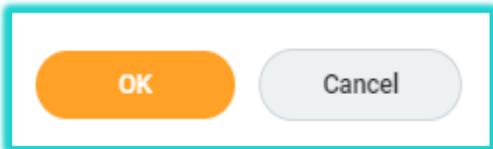
**Review Effort Certification**  
Florida Poly Sponsored Research for 02/01/2020 - 02/28/2020  
6 day(s) ago - Due 03/06/2020

Effort Certification for 02/01/2020 - 02/28/2020

Total Certified Amount Estimated 4,500.00  
Total Certified Percentage Estimated 100.0%

Effort Certification 1 item

Period	Worktags		Original Amount	Original Percent	Change Reason	Certified Amount Estimated	Certified Percent Estimated	Order
	Payroll	Costing						
02/01/2020 - 02/15/2020 (Salary)								
	+	Earning: Salary Employee: Job Profile: Pay Group: Salary - Academic Position: Run Category: Regular	CIP Code: 14.2101 Mining and Mineral Engineering Cost Center: 1020 FIPR Institute Fund: 102 FIPR Grant: GR Institute Part 2 - Cost Share Location: Florida Industrial and Phosphate Research Institute More (1)	450.00	10.0%	<input checked="" type="checkbox"/> Effort Certification Adjustment	225.00	5
	+	Earning: Salary Employee: Job Profile: Pay Group: Salary - Academic Position: Run Category: Regular	CIP Code: 14.2101 Mining and Mineral Engineering Cost Center: 1020 FIPR Institute Fund: 203 Sponsored Programs Grant: GR Institute Part 2 Location: Florida Industrial and Phosphate Research Institute More (1)	450.00	10.0%	<input checked="" type="checkbox"/> Effort Certification Adjustment	675.00	15
	+	Earning: Salary Employee: Job Profile: Pay Group: Salary - Academic Position: Run Category: Regular	CIP Code: Administration CIP Cost Center: 1020 FIPR Institute Fund: 102 FIPR Location: Florida Industrial and Phosphate Research Institute Program: Z200 Individual or Project Research	3,600.00	80.0%	<input type="checkbox"/>	3,600.00	80
			4,500.00	100%		4,500.00	100.0%	



**Step 5:** Prior to submitting your changes, review each tab (i.e. *Summary, Details, Positions & Questions*) and type **'YES'** under the **'Questions'** tab.

## Summary

I Certify

Summary Details Questions

Summary 3 items

	Effort Certification Summary			
	Worktags	Certified Amount Estimated	Certified Percentage of Group Estimated	Certified Percentage of Total Estimated
1020 FIPR Institute	1020 FIPR Institute 102 FIPR 2200 Individual or Project Research Administration CIP	3,600.00	80.0%	80.0%
	1020 FIPR Institute 14.2101 Mining and Mineral Engineering 203 Sponsored Programs 2200 Individual or Project Research GR-	675.00	15.0%	15.0%
	1020 FIPR Institute 102 FIPR 14.2101 Mining and Mineral Engineering 2200 Individual or Project Research GR- Cost Share	225.00	5.0%	5.0%
<b>Total:</b>		<b>4,500.00</b>	<b>100.0%</b>	<b>100.0%</b>

## Details

I Certify

Summary Details Positions Questions

Details 3 items

Period	Worktags		Original Amount	Original Percent	Change Reason
	Payroll	Worktags			
02/01/2020 - 02/15/2020 (Salary)	Earning: Salary Employee: Job Profile: Pay Group: Salary - Academic Position: Run Category: Regular	CIP Code: Administration CIP Cost Center: 1020 FIPR Institute Fund: 102 FIPR Location: Florida Industrial and Phosphate Research Institute Program: 2200 Individual or Project Research	3,600.00	80.0%	
	Earning: Salary Employee: Job Profile: Pay Group: Salary - Academic Position: Run Category: Regular	CIP Code: 14.2101 Mining and Mineral Engineering Cost Center: 1020 FIPR Institute Fund: 203 Sponsored Programs Grant: GR- Location: Florida Industrial and Phosphate Research Institute Program: 2200 Individual or Project Research	450.00	10.0%	Effort Certification Adjustment
	Earning: Salary Employee: Job Profile: Pay Group: Salary - Academic Position: Run Category: Regular	CIP Code: 14.2101 Mining and Mineral Engineering Cost Center: 1020 FIPR Institute Fund: 102 FIPR Grant: GR- Share Location: Florida Industrial and Phosphate Research Institute Program: 2200 Individual or Project Research	450.00	10.0%	Effort Certification Adjustment
			<b>Total:</b>	<b>4,500.00</b>	<b>100.0%</b>

## Step 5 (cont.):

### Positions

I Certify

Summary Details **Positions** Questions

Positions 1 item

Position	FTE
P00123 Position (Tester)	100%

### Questions

**Review Effort Certification** for 02/01/2020 - 02/28/2020

Florida Poly Sponsored Research for Effort Certification for 02/01/2020 - 02/28/2020

6 day(s) ago - Due 03/06/2020

Effort Certification Status: In Progress | Changed Status: Changed

Total Certified Amount Estimated: 4,500.00  
Total Certified Percentage Estimated: 100.0%

I certify I have firsthand knowledge (or have suitable means of verifying) that the changes to the distribution percentages reasonably represent the actual effort expended on each project listed for the period covered. I am aware that any false, fictitious, or fraudulent information may subject me to criminal, civil, or administrative penalties. (U.S. Code, Title 18, Section 1001)

I Certify

Summary Details Positions **Questions**

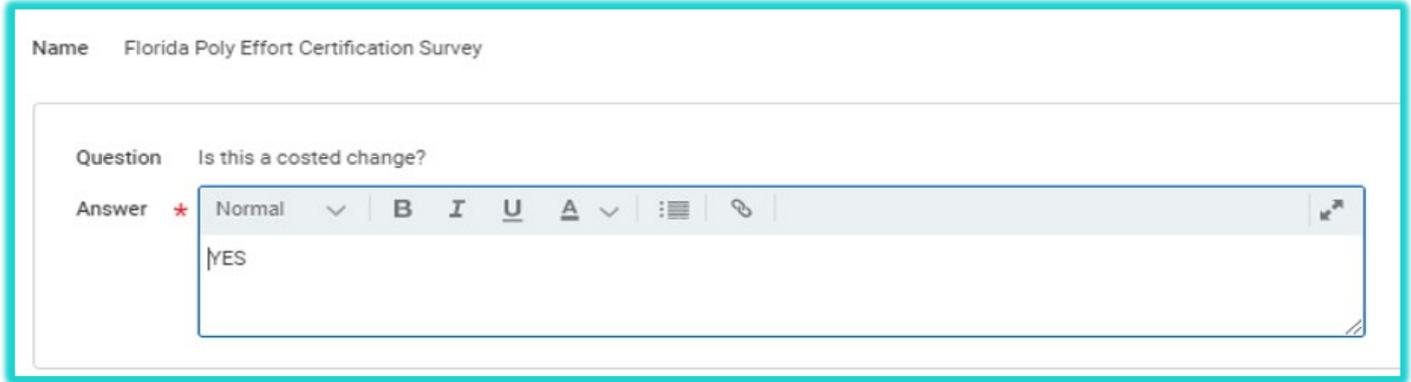
Name: Florida Poly Effort Certification Survey

Question: Is this a costed change?

Answer:

Submit Change Effort Save for Later Cancel

## Step 5 (cont.):



Name Florida Poly Effort Certification Survey

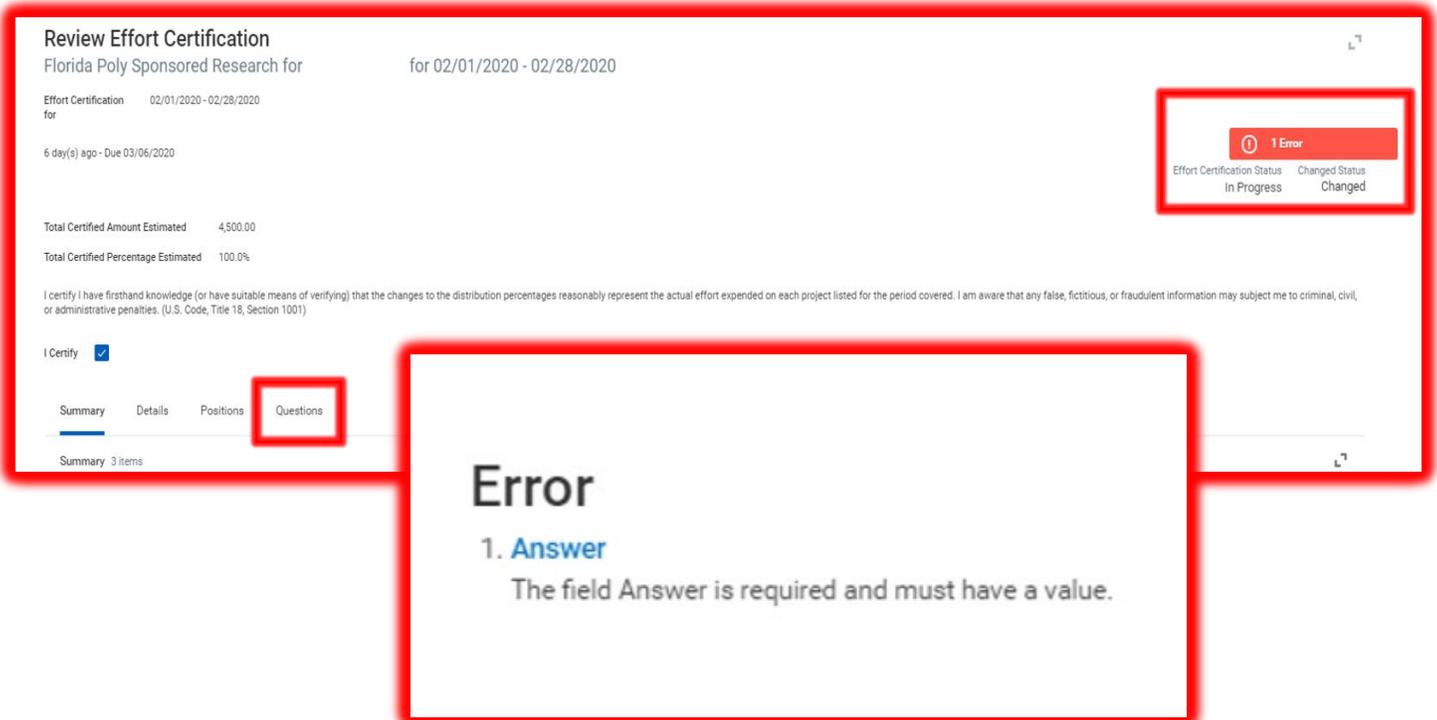
Question Is this a costed change?

Answer \* **Normal** **B** **I** **U** **A** **☰** **🔗**

YES

**IMPORTANT:** A *costed change* is a change that will affect the award budget for the time an employee spends working on the grant.

Under the '**Questions**' tab, you must type '**YES**' in the 'Answer' field, otherwise you will receive the below error notification and error message when you select the '**Submit**' button.



Review Effort Certification  
Florida Poly Sponsored Research for 02/01/2020 - 02/28/2020

Effort Certification 02/01/2020 - 02/28/2020  
for

6 day(s) ago - Due 03/06/2020

Total Certified Amount Estimated 4,500.00  
Total Certified Percentage Estimated 100.0%

I certify I have firsthand knowledge (or have suitable means of verifying) that the changes to the distribution percentages reasonably represent the actual effort expended on each project listed for the period covered. I am aware that any false, fictitious, or fraudulent information may subject me to criminal, civil, or administrative penalties. (U.S. Code, Title 18, Section 1001)

I Certify

Summary Details Positions **Questions**

Summary 3 items

**1 Error**  
Effort Certification Status In Progress Changed Status Changed

**Error**  
1. Answer  
The field Answer is required and must have a value.

- \* Then proceed with the instruction under [Step 4.1](#) to certify and submit the 'Effort Certification' for review by the **Lead Principle Investigator (L.P.I.)**.

**Review Effort Certification**  
 Florida Poly Sponsored Research for 02/01/2020 - 02/28/2020

Effort Certification for 02/01/2020 - 02/28/2020  
 6 day(s) ago - Due 03/06/2020

Total Certified Amount Estimated 4,500.00  
 Total Certified Percentage Estimated 100.0%

I certify I have firsthand knowledge (or have suitable means of verifying) that the changes to the distribution percentages reasonably represent the actual effort expended on each project listed for the period covered. I am aware that any false, fictitious, or fraudulent information may subject me to criminal, civil, or administrative penalties. (U.S. Code, Title 18, Section 1001)

I Certify

Summary Details Positions Questions

Summary 3 Items

Effort Certification Summary				
	Worktags	Certified Amount Estimated	Certified Percentage of Group Estimated	Certified Percentage of Total Estimated
1020 FIPR Institute	1020 FIPR Institute 102 FIPR 2200 Individual or Project Research Administration CIP	3,600.00	80.0%	80.0%
	1020 FIPR Institute 14.2101 Mining and Mineral Engineering 203 Sponsored Programs 2200 Individual or Project Research GR-	675.00	15.0%	15.0%
	1020 FIPR Institute 102 FIPR 14.2101 Mining and Mineral Engineering 2200 Individual or Project Research GR-	225.00	5.0%	5.0%
Total:		4,500.00	100.0%	100.0%

Submit Change Effort Save for Later Cancel

**Success! Event submitted**  
 Effort Certification: Florida Poly Sponsored Research for [redacted] for 02/01/2020 - 02/28/2020  
 6 day(s) ago - Due 03/06/2020

**Up Next**

Administrative Review  
 Due Date 03/12/2020

Review

> Details and Process

**Up Next**

Administrative Review  
 Due Date 03/12/2020

Review

**Others Awaiting My Action**

Effort Certification: Florida Poly Sponsored Research for 03/01/2019 - 03/31/2019 for

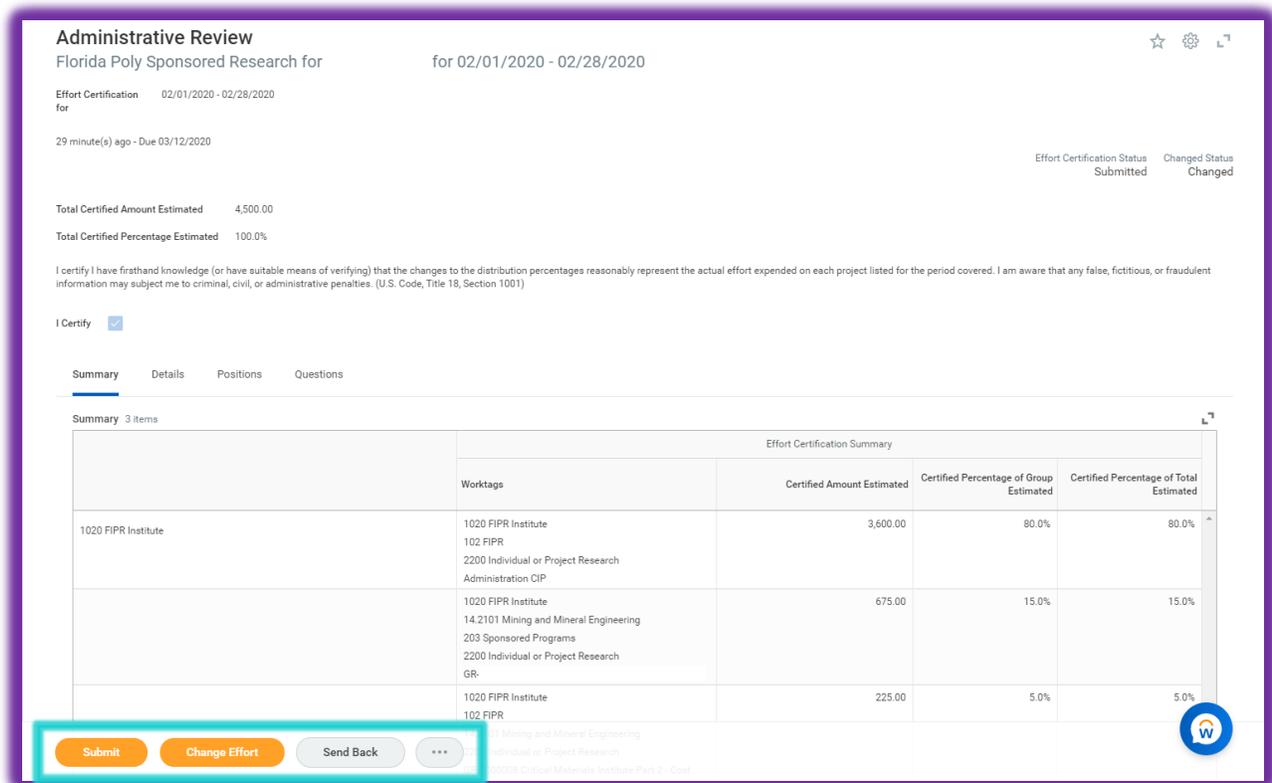
Effort Certification: Florida Poly Sponsored Research for 02/01/2020 - 02/29/2020 for

Effort Certification: Florida Poly Sponsored Research for 03/01/2019 - 03/31/2019 for

## Review and Approval by Lead Principle Investigator (L.P.I.)

**Step 1:** Login to Workday

**Step 2:** On the Welcome page navigate to either the **'Inbox' section** or the **'Inbox' icon** in the upper right of the screen and select the **'Administrative Review'** task.



**Administrative Review**  
Florida Poly Sponsored Research for 02/01/2020 - 02/28/2020

Effort Certification for 02/01/2020 - 02/28/2020

29 minute(s) ago - Due 03/12/2020

Total Certified Amount Estimated 4,500.00  
Total Certified Percentage Estimated 100.0%

I certify I have firsthand knowledge (or have suitable means of verifying) that the changes to the distribution percentages reasonably represent the actual effort expended on each project listed for the period covered. I am aware that any false, fictitious, or fraudulent information may subject me to criminal, civil, or administrative penalties. (U.S. Code, Title 18, Section 1001)

I Certify

Summary Details Positions Questions

Summary 3 items

		Effort Certification Summary		
	Worktags	Certified Amount Estimated	Certified Percentage of Group Estimated	Certified Percentage of Total Estimated
1020 FIPR Institute	1020 FIPR Institute 102 FIPR 2200 Individual or Project Research Administration CIP	3,600.00	80.0%	80.0%
	1020 FIPR Institute 14.2101 Mining and Mineral Engineering 203 Sponsored Programs 2200 Individual or Project Research GR:	675.00	15.0%	15.0%
	1020 FIPR Institute 102 FIPR	225.00	5.0%	5.0%

Submit Change Effort Send Back ...

**Step 3:** The **Lead Principle Investigator (L.P.I.)** will either:

- a) Review and select **'Submit'**
- b) Select **'Change Effort'**, make the necessary updates on behalf of the worker and select **'Submit'** (as described above in [step 5](#)).
- c) Or select **'Send Back'** for the worker to make the necessary updates and then resubmit to the *L.P.I.* and *Grant Manager* for review and approval.

Success! Event submitted

Effort Certification: Florida Poly Sponsored Research for [redacted] for 02/01/2020 - 02/28/2020 [Actions](#)

59 minute(s) ago - Due 03/12/2020

Up Next



Nicole Tardiff

Approval by Grant Manager

> [Details and Process](#)

Others Awaiting My Action

Effort Certification: Florida Poly Sponsored Research for  
for 03/01/2019 - 03/31/2019

Effort Certification: Florida Poly Sponsored Research for  
for 02/01/2020 - 02/29/2020

Effort Certification: Florida Poly Sponsored Research for  
for 03/01/2019 - 03/31/2019

Up Next



Nicole Tardiff

Approval by Grant Manager

## Final Review & Approval by Grant Manager

**Step 1:** Login to Workday

**Step 2:** On the Welcome page navigate to either the **'Inbox' section** or the **'Inbox' icon** in the upper right of the screen and select the **'Review Effort Certification'** task.

**Step 3:** Lastly, the **Grant Manger** will either:

- a) Review and select **'Approve'**
- b) Or select **'Send Back'** for the worker to make the necessary updates and then resubmit to the *L.P.I.* and *Grant Manager* for review and approval.

**Review**

Effort Certification: Florida Poly Sponsored Research for for 02/01/2020 - 02/28/2020 Actions

4 minute(s) ago





For Florida Poly Sponsored Research for for 02/01/2020 - 02/28/2020

Overall Process Effort Certification: Florida Poly Sponsored Research for for 02/01/2020 - 02/28/2020

Overall Status In Progress

Due Date 03/11/2020

**Details to Review**

Effort Certification Status Submitted

Effort Certification Florida Poly Sponsored Research for for 02/01/2020 - 02/28/2020

Total Certified Amount Estimated 4,500.00

Total Certified Percentage Estimated 100.0%

I certify I have firsthand knowledge (or have suitable means of verifying) that the changes to the distribution percentages reasonably represent the actual effort expended on each project listed for the period covered. I am aware that any false, fictitious, or fraudulent information may subject me to criminal, civil, or administrative penalties. (U.S. Code, Title 18, Section 1001)

I Certify

Summary 3 items

Effort Certification Summary				
	Worktags	Certified Amount Estimated	Certified Percentage of Group Estimated	Certified Percentage of Total Estimated
1020 FIPR Institute	1020 FIPR Institute 102 FIPR 2200 Individual or Project Research Administration CIP	3,600.00	80.0%	80.0%
	1020 FIPR Institute 14.2101 Mining and Mineral Engineering 2200 Individual or Project Research 08.20200005 Critical Materials Institute Part 2	675.00	15.0%	15.0%

Approve
Send Back
Cancel

