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](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.
3. Select an Effort Certification Report to 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
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.
Effort Certification Review

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

<table>
<thead>
<tr>
<th>Period</th>
<th>Worktags</th>
<th>Original Amount</th>
<th>Original Percent</th>
<th>Certified Amount Estimated</th>
<th>Certified Percentage of Period Estimated</th>
</tr>
</thead>
<tbody>
<tr>
<td>09/01/2017 - 09/30/2017 (Monthly)</td>
<td>Fund: FD100 Operating</td>
<td>$XX</td>
<td>100.0%</td>
<td>$XX</td>
<td>100.0%</td>
</tr>
<tr>
<td>Total:</td>
<td></td>
<td>$XX</td>
<td>100.0%</td>
<td>$XX</td>
<td>100.0%</td>
</tr>
<tr>
<td>10/01/2017 - 10/31/2017 (Monthly)</td>
<td>Fund: FD500 Grants</td>
<td>$XX</td>
<td>96.6%</td>
<td>$XX</td>
<td>96.6%</td>
</tr>
<tr>
<td>Grant: GR25385</td>
<td></td>
<td>$XX</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Univ: GR25385</td>
<td></td>
<td>$XX</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fund: FD100 Operating</td>
<td></td>
<td>$XX</td>
<td>3.4%</td>
<td>$XX</td>
<td>3.4%</td>
</tr>
<tr>
<td>Total:</td>
<td></td>
<td>$XX</td>
<td>100.0%</td>
<td>$XX</td>
<td>100.0%</td>
</tr>
</tbody>
</table>
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.

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.
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.
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.