Requesting a Proxy Approval Role

When a faculty member, principal investigator or academic staff member is not available to certify his or her effort, you can request a proxy approval role so another individual can perform the certification. Keep in mind: the individual performing the proxy certification must have suitable means of verifying the work was performed.

Note: To perform this workflow, you must have the following myUFL security role: `UF_ET_EFFORT_COORDINATOR`

To request a proxy approval role, perform the following steps:

1. Open the effort certification report of the employee for whom the proxy approval role is needed.

2. Click the Approval Detail tab. On this tab you can view the current step in the approval path for the report. You can also click the Show Approvers button to view a list of employees set up to perform each step of the process.

3. Click the Add Proxy to Approval Roles link.

![Figure 1: Effort Certification Form, Approval Detail Tab](image-url)
4. In the User ID field, type the UF Employee ID of the person for whom you would like to request a proxy approval role.

5. Press the **TAB** key. The selected employee’s name displays in the Name field.

   **Tip:** The Employee ID field displays the UF Employee ID of the person whose effort needs to be certified.

6. Click the **Appointment** drop-down arrow and then click the appointment number of the job record for which the proxy approval role will be requested.

7. If the proxy request is for a certification report on the CERT_PI approval path, click the **Project ID** drop-down arrow and then click the Project ID of the project for which the proxy approval role will be needed.

8. Click the **Comments** field and then enter a short comment supporting the proxy request.

9. If a proxy approval role is needed for an additional job record or Project ID, click the **Add Row** button and then repeat steps 4 – 8.

10. Click **OK**. The proxy approval role request is forwarded to the Department of Cost Analysis, which will review the request. Requests will typically be reviewed within one business day.