Instruction Guide



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.

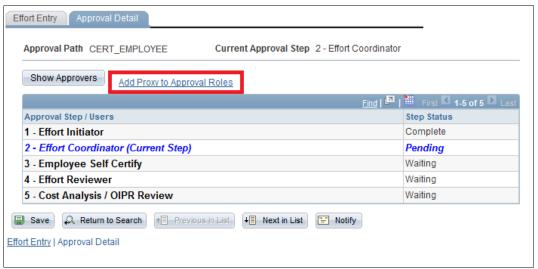


Figure 1: Effort Certification Form, Approval Detail Tab

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- 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.



Figure 2: Approval Detail Tab, CERT_EMPLOYEE Approval Path

- 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.



Figure 3: Approval Detail Tab, CERT_PI Approval Path

- 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.