

## Entering and Submitting Effort

Note: To perform the following workflows, you must have the following myUFL security role:  
**UF\_ET\_EFFORT\_COORDINATOR**

### Searching for Reports

1. To search for the effort certification reports in your queue, click the **Main Menu**.
2. Click **Effort Reporting** and then click **Effort Certification**.
3. Click **Certify Effort**. The main Search page displays.
4. Verify the **My Queue Only** check box is selected. If it's not selected, click the check box. This option is especially useful because it ensures your search will focus only on the reports in your queue – that is, the reports for which you are currently responsible.
5. Click the **Search** button. The search results display in the lower section of the window.

The screenshot shows a search interface with the following elements:

- Approval Path:** A dropdown menu set to "begins with" and an empty search input field.
- Buttons:** "Search", "Clear", "Basic Search", and "Save Search Criteria".
- Search Results:** A table with the following data:

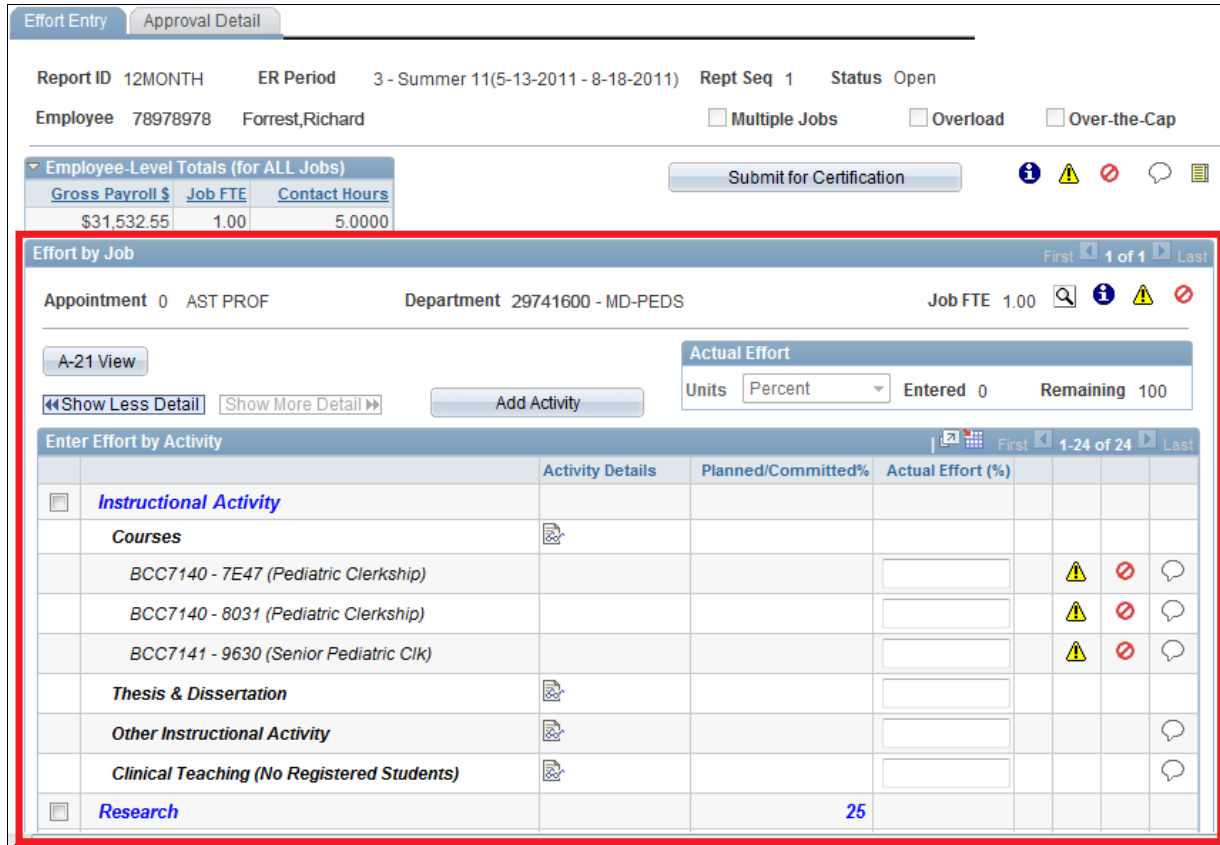
Report ID	ER Year	ER Period	Short Description	Employee ID	Report Sequence	Employee Name	Report Status	Approval Sequence	Overload	Multiple Jobs	OT
10MONTH	2011	3	Summer 11	36925814	1	Wharton, Janet	Open	2	N	No	N
10MONTH	2011	3	Summer 11	74185296	1	Cruz, Andrew	Open	2	N	No	N

**Figure 1: Effort Certification Search Page, Search Results Displayed**

6. Click the link for the first report you want to view. The effort certification form displays.

## Entering Effort

1. Review the header information in the top section of the report. The **Multiple Jobs** check box displays as selected when multiple jobs are included in the report.
2. Review the header information in the Effort by Job section. The header displays important job details such as the **Appointment #**, **Description**, **Department** and **Job FTE**.



Report ID 12MONTH    ER Period 3 - Summer 11(5-13-2011 - 8-18-2011)    Rept Seq 1    Status Open  
 Employee 78978978    Forrest,Richard     Multiple Jobs     Overload     Over-the-Cap

Employee-Level Totals (for ALL Jobs)  
 Gross Payroll \$ 31,532.55    Job FTE 1.00    Contact Hours 5.0000

Submit for Certification

**Effort by Job**    Appointment 0    AST PROF    Department 29741600 - MD-PEDS    Job FTE 1.00

A-21 View    Actual Effort    Units Percent    Entered 0    Remaining 100

Show Less Detail    Show More Detail    Add Activity

Enter Effort by Activity		Activity Details	Planned/Committed%	Actual Effort (%)			
<input type="checkbox"/>	<b>Instructional Activity</b>						
	<b>Courses</b>						
	BCC7140 - 7E47 (Pediatric Clerkship)					⚠	⊗
	BCC7140 - 8031 (Pediatric Clerkship)					⚠	⊗
	BCC7141 - 9630 (Senior Pediatric Clk)					⚠	⊗
	<b>Thesis &amp; Dissertation</b>						
	<b>Other Instructional Activity</b>						
	<b>Clinical Teaching (No Registered Students)</b>						
<input type="checkbox"/>	<b>Research</b>		25				

**Figure 2: Effort Certification Form, Effort by Job Section**

3. Verify the correct activities for the effort period display on the form. If any activities performed during the effort period are not displayed, add them to the form.
  - If any course sections taught by the instructor do not display, you'll need to contact the Office of Institutional Planning and Research (OIPR) to have the Instructor Workload File (IWF) corrected.
  - To add a research project, Sabbatical/Leave of Absence or Other activity to the form, click the **Add Activity** button to begin adding the activities.

4. Review the values in the **Planned/Committed** column. This column displays:
  - Planned effort values from the Faculty Assignment Report (FAR), if the FAR was completed for the faculty member. In these cases, you can review the FAR form by clicking the **View FAR** link in the header of the Effort by Job section.
  - Commitment values from the Commitments module. You can view more information for a commitment by clicking the link on the commitment percentage value.

<input type="checkbox"/>	<b>Research</b>		25	25			
	<i>Department Funded Research</i>						
	<i>Externally Funded Research/Other Spons Activity</i>		25	25			
	09460284 - Early Childhood Dev		5	5			
	03560387 - Immunization Strategies						
	04020334 - RNA Structure and		20	20			

**Figure 3: Commitment Percentage Links**

5. Enter actual effort for the activities performed. Keep in mind, total effort allocation for the job record must equal 100%.

***Tip: Sub-totals update for each section as you enter actual effort. In addition, the Actual Effort section at the top of the form also updates to display effort allocated and remaining for the record as a whole.***

6. Review and reconcile any error, warning, cancel or information messages displayed on the Effort Entry page. To view the text of a system message, click the message icon.
7. Repeat steps 2 – 6 in this section for any additional job records.
8. Click the **Save** button.

## **Resolving Discrepancies**

1. Click the **A-21 View** button. Federal A-21 Effort View displays the distribution of gross payroll amounts for the employee.
2. For each sponsored activity, compare the level of expected effort to the level of actual effort.

***Tip: The value in the Expected Effort column is the result of a calculation that takes into account factors such as payroll charges, commitments and salary cap requirements. This value is designed to provide you with a quick reference of the level of effort the system expects you to report.***

3. Review the components of each sponsored activity. For each project, you can view a breakdown of:
  - Direct charged salary
  - Committed cost sharing
  - Over the salary cap details
  - Uncommitted cost sharing
4. Under Non-Sponsored Activities, review the sources of funding that are eligible for cost sharing.
5. Review any error, warning, cancel or information messages displayed on the A-21 view page. To view the text of a system message, click the message icon.
6. Resolve any discrepancies between expected effort and actual effort. To resolve these types of discrepancies, you might need to:
  - Check for cost sharing requirements that have not been properly documented
  - Process retroactive payroll transfers to adjust payroll distribution
  - Adjust current and future period commitment values in the Commitments module
  - Contact the Office of Contacts and Grants to have a commitment added
7. When you're finished resolving discrepancies between expected effort values and actual effort, click **OK**.
8. Repeat steps 1 – 7 in this section for any additional job records.
9. Click the **Save** button.

## Submitting a Report for Certification

1. Click the **Submit for Certification** button.
2. Click **Submit**.
3. Enter a comment, if needed. Keep in mind: any comments entered become a part of the university's effort records.
4. Click **OK**. The report is advanced and the faculty member or PI will receive an email shortly indicating the certification report is ready. He or she can make changes if needed. If any changes are made, the report will be returned to the effort coordinator for adjustment and finalization.