

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.

Effort Entry | **Approval Detail**

Approval Path CERT_EMPLOYEE Current Approval Step 2 - Effort Coordinator

Show Approvers **Add Proxy to Approval Roles**

Approval Step / Users	Step Status
1 - Effort Initiator	Complete
2 - Effort Coordinator (Current Step)	Pending
3 - Employee Self Certify	Waiting
4 - Effort Reviewer	Waiting
5 - Cost Analysis / OIPR Review	Waiting

Save Return to Search Previous in List Next in List Notify

[Effort Entry](#) | [Approval Detail](#)

Figure 1: Effort Certification Form, Approval Detail Tab

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.

Add Proxy Users to Employee or PI Approval Steps

Approval Path CERT_EMPLOYEE

User ID	Name	Employee ID	Appointment	Comments
1 78978978		12312312	▼	

OK Cancel

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.

Add Proxy Users to Employee or PI Approval Steps

Approval Path CERT_PI

User ID	Name	Employee ID	Appointment	Project ID	Comments
1 78978978		45645645	▼	▼	

OK Cancel

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.