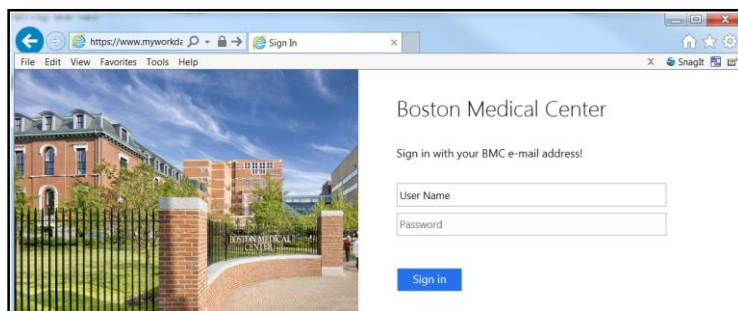


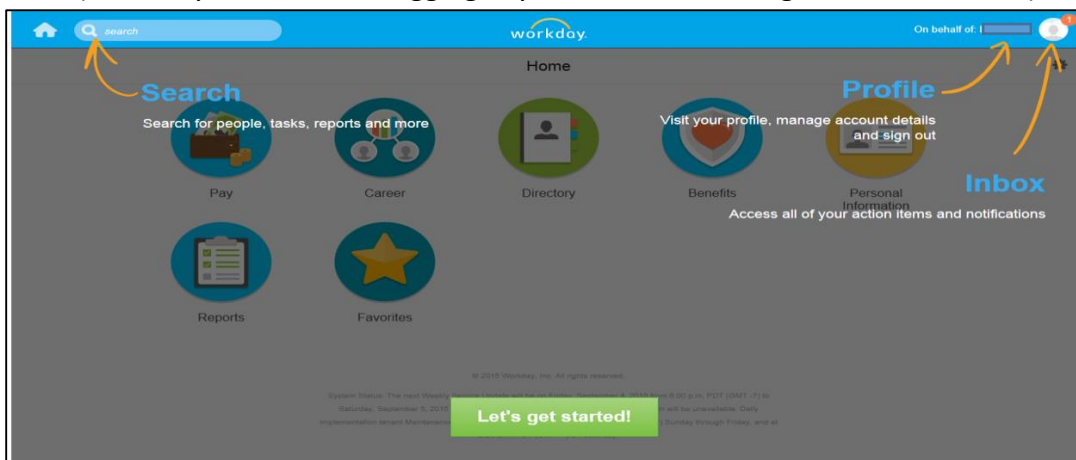
Workday Effort Certification – Employee

The purpose of this job aid is to provide instructions regarding the review, modification, and certification of effort reports generated in the Workday Time and Effort System. As the Effort Certifier (Employee), you will be responsible for reviewing your effort report, making changes if it is not correct, and certifying its accuracy once completed. The reports are initiated by the Effort Manager (Research Finance) and routed to the Effort Reviewer (Research Administrator) for the department. The certification will be available for your review, and will appear in your Workday Inbox once your Effort Reviewer has approved the report and routed it to you. Both the Effort Reviewer and the Employee have the opportunity to modify the report to accurately reflect where time and effort was spent across the 6-month reporting period. In the case where the effort report is already correct, simply certify the statement, as is.

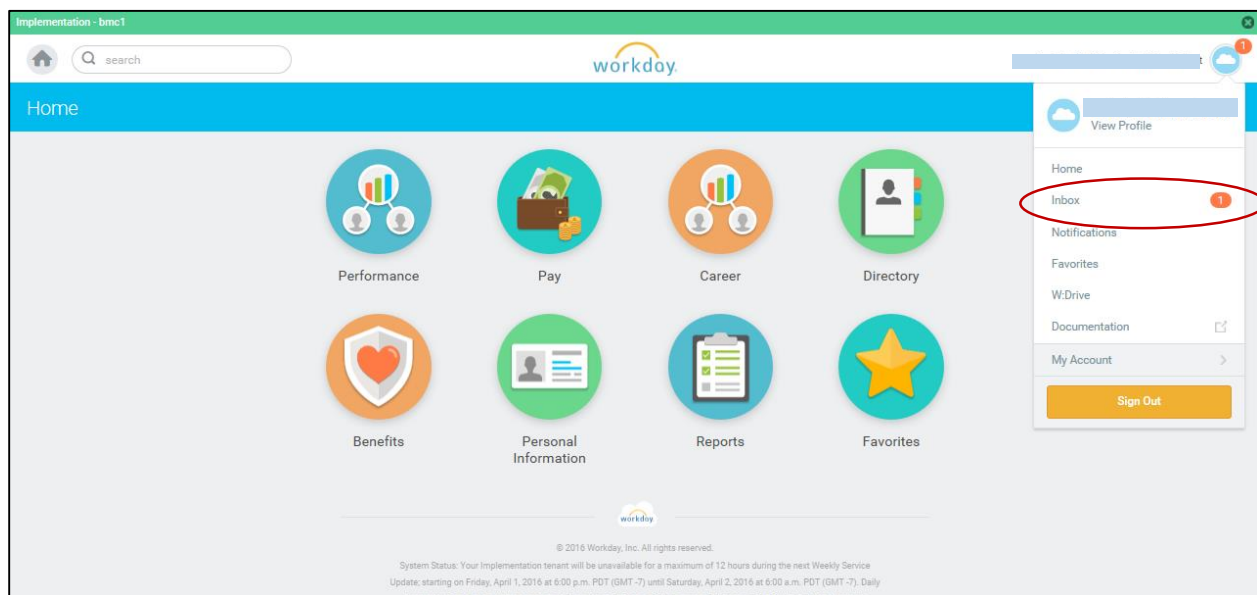
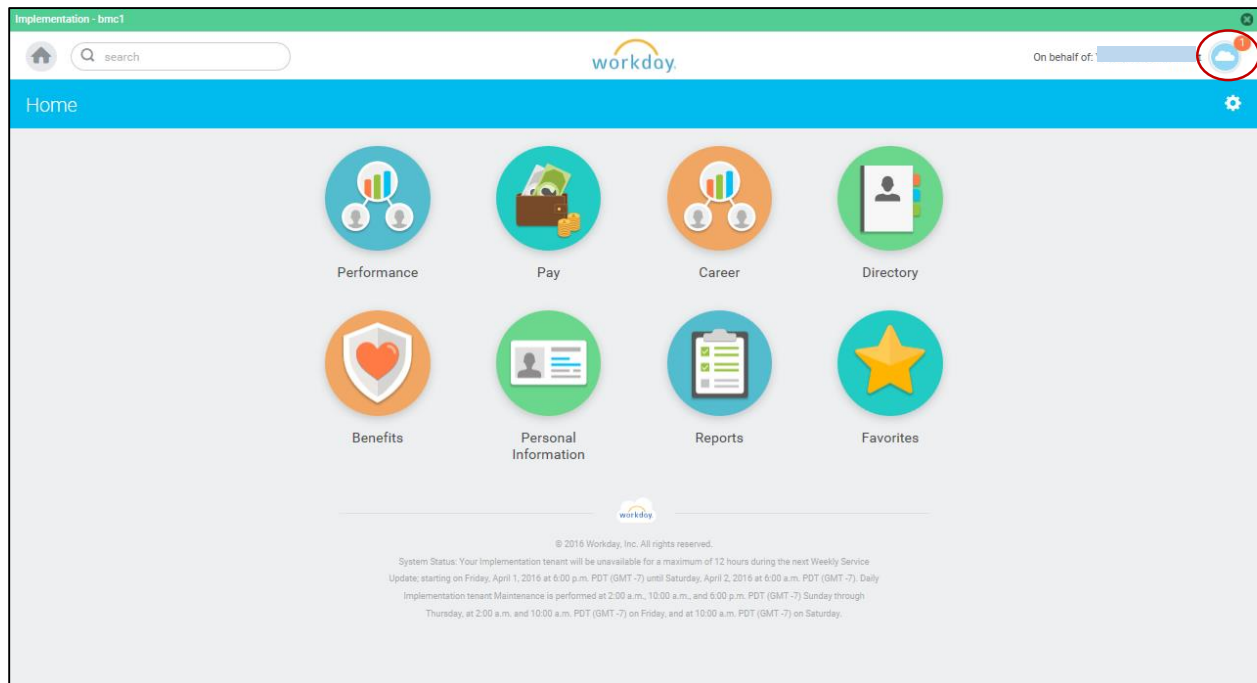
1. Log into Workday: <https://www.myworkday.com/bmc>



2. Once you have logged in, click on your name in the upper right and choose 'Inbox' from the drop down menu. There will be a small orange circle with a number in it when you have certifications awaiting your review. (If this is your first time logging in you will see a "Let's get started" screen)



Workday Effort Certification – Employee (cont.)



Workday Effort Certification – Employee (cont.)

- A list of active certifications pending your certification is found on the left side of the screen under the tab titled, 'Actions'. Clicking an item from the list will open it on the right side of the screen. Click the toggle icon to view a selected certification in full screen mode.

Implementation - bmc1

Inbox

Actions 1 | **Archive 0**

Viewing: All | Sort By: Newest

Effort Certification: Effort Research Group - Worktags Off
01/01/2016 - 06/30/2016
3 minute(s) ago - Due 04/05/2016

Review Effort Certification Effort Type Testing for 12/27/2015 - 06/30/2016
for 01/01/2016 - 06/30/2016

Effort Certification for 01/01/2016 - 06/30/2016

Effort Certification Status: In Progress | Changed Status: Unchanged

3 minute(s) ago - Due 04/05/2016

Total Certified Percentage Estimated: 100.0%

I certify that I have first-hand knowledge of (or have suitable means of verifying) that the changes to the distribution percentages reasonably represent the actual effort expended on each project listed for the period covered. I am aware that any false, fictitious or fraudulent information may subject me to criminal, civil or administrative penalties. (U.S. Code, Title 18, Section 1001).

I Certify ☐

Summary | Details | Positions

Summary 10 items

Effort Certification Summary			
	Worktags	Certified Percentage of Group Estimated	Certified Percentage of Total Estimated
100.8800016.0000000 Pediatrics 9500303879	100.8800016.0000000 Pediatrics 9500303879 BMC Weekly	100.0%	22.5%
	Total:	100.0%	22.5%
100.6001720.0172008 Boston Center For Infants At Risk	100.6001720.0172008 Boston Center For Infants At Risk BMC Weekly	100.0%	25.0%
	Total:	100.0%	25.0%
		100.0%	25.0%

Submit | Change Effort | Send Back | More

Workday Effort Certification – Employee (cont.)

4. Anatomy of an Effort Certification:

The name of the employee and certification period are located along the top of the screen.

The screenshot shows the 'Review Effort Certification' page in Workday. The header includes the Workday logo and a search bar. Below the header, the page title is 'Review Effort Certification Effort Type Testing for [redacted] for 12/27/2015 - 06/30/2016'. The page is divided into several sections:

- Effort Certification for 12/27/2015 - 06/30/2016**: This section includes a callout stating 'This statement was initiated 4 days ago'.
- Effort Certification Status**: The status is 'In Progress'. A callout states 'Effort Certification Status is 'In Progress''.
- Changed Status**: The status is 'Unchanged'. A callout states 'Changed Status is 'Unchanged''.
- Total Certified Percentage Estimated**: 100.0%.
- Statement of Certification**: A section with a checkbox labeled 'I Certify' and a callout stating 'Statement of Certification'.

At the bottom, there are three tabs: 'Summary', 'Details', and 'Positions'.

Note: the Effort Certification Status will change to 'Submitted' once the employee certifies the statement and change to 'Certified' once the statement is approved by Research Finance. The Changed Status simply updates to 'Changed' if changes are made to the effort distribution.

5. Scroll to the middle of the screen to view the time and effort totals for the period. There are Summary, Details and Positions tabs. The Summary tab displays the cumulative percentage average for the entire certification period.

Summary 3 items			
Effort Certification Summary			
	Worktags	Certified Percentage of Group Estimated	Certified Percentage of Total Estimated
Research Grants	100.6002980.0298007 Tuberculosis Clinical Diagnostics Research Consortium (CDRC)-Administrative Core BMC Weekly	75.0%	75.0%
	100.6003541.0354102 TBRU - Biomarkers and Mechanisms of Paucibacillary and Latent Tuberculosis BMC Weekly	25.0%	25.0%
	Total:	100.0%	100.0%

Workday Effort Certification – Employee (cont.)

- This Details tab should be your primary focus. This tab shows every pay period contained in the certification period. Ensure that the cost centers and corresponding effort percentages reflect the project(s) where you expended effort for that pay period.

Summary Details Positions				
Details 12 items				
Period	Worktags		Original Percent	Certified Percentage of Period Estimated
	Payroll	Costing		
12/27/2015 - 01/02/2016 (Boston Medical Weekly)	Pay Group: BMC Weekly	Cost Center: 100.6002980.0298007 Tuberculosis Clinical Diagnostics Research Consortium (CDRC)-Administrative Core	75.0%	75.0%
	Pay Group: BMC Weekly	Cost Center: 100.6003541.0354102 TBRU - Biomarkers and Mechanisms of Paucibacillary and Latent Tuberculosis	25.0%	25.0%
		Total:	100.0%	100.0%
01/03/2016 - 01/09/2016 (Boston Medical Weekly)	Pay Group: BMC Weekly	Cost Center: 100.6002980.0298007 Tuberculosis Clinical Diagnostics Research Consortium (CDRC)-Administrative Core	75.0%	75.0%
	Pay Group: BMC Weekly	Cost Center: 100.6003541.0354102 TBRU - Biomarkers and Mechanisms of Paucibacillary and Latent Tuberculosis	25.0%	25.0%
		Total:	100.0%	100.0%
01/10/2016 - 01/16/2016 (Boston Medical Weekly)	Pay Group: BMC Weekly	Cost Center: 100.6003541.0354102 TBRU - Biomarkers and Mechanisms of Paucibacillary and Latent Tuberculosis	25.0%	25.0%
	Pay Group: BMC Weekly	Cost Center: 100.6002980.0298007 Tuberculosis Clinical Diagnostics Research Consortium (CDRC)-Administrative Core	75.0%	75.0%
		Total:	100.0%	100.0%
01/17/2016 - 01/23/2016 (Boston Medical Weekly)	Pay Group: BMC Weekly	Cost Center: 100.6002980.0298007 Tuberculosis Clinical Diagnostics Research Consortium (CDRC)-Administrative Core	75.0%	75.0%
	Pay Group: BMC Weekly	Cost Center: 100.6003541.0354102 TBRU - Biomarkers and Mechanisms of Paucibacillary and Latent Tuberculosis	25.0%	25.0%
		Total:	100.0%	100.0%

Note: for the purposes of this work aid, we have only included four pay periods. During the semi-annual effort certification period, you will be reviewing 26 weekly pay periods.

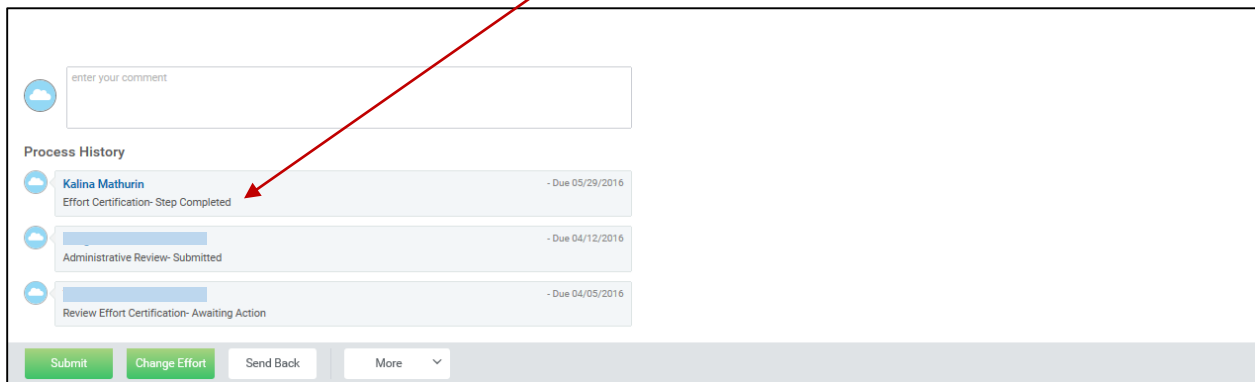
- “Positions” tab.

Summary Details Positions	
Positions 1 items	
Position	FTE
50148253 Program Director (S) -	100%

Workday Effort Certification – Employee (cont.)

- Scroll to the bottom of the screen to view the 'Process History' and a field used to enter comments. *Please keep in mind that these comments will be permanently attached to this record and reviewable during routine audits. This field should only be used to aid downstream certifiers and reviewers to understand the reasoning behind modifications to the original effort statement.*

Note: the first step in the process will always state 'Effort Certification – Step Completed'. This simply indicates that Research Finance has initiated the Effort Certification process, not that the statement has been certified. The Effort Reviewer has completed the administrative review and the certification is now ready for your review as the Employee.

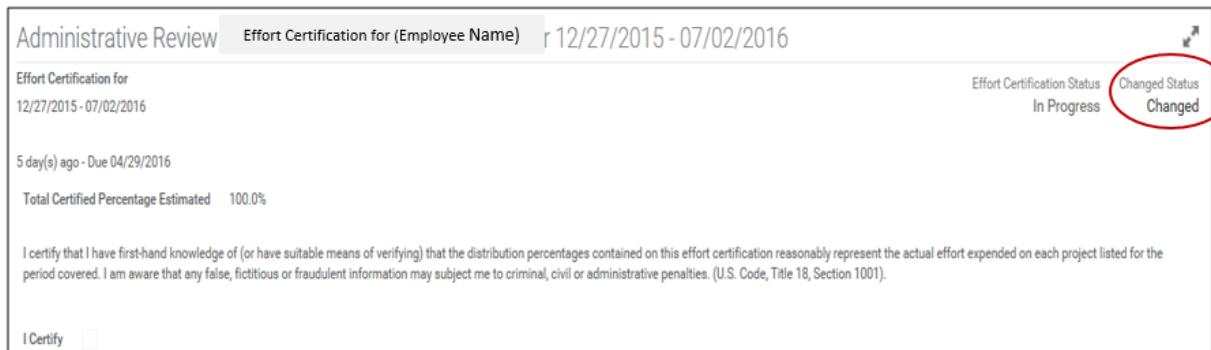


The screenshot shows a 'Process History' section with three entries:

- Kalina Mathurin** - Effort Certification- Step Completed - Due 05/29/2016
- [Redacted]** - Administrative Review- Submitted - Due 04/12/2016
- [Redacted]** - Review Effort Certification- Awaiting Action - Due 04/05/2016

A red arrow points from the 'Step Completed' entry to the 'Comments' field above it, which contains the placeholder text 'enter your comment'. Below the history list are buttons for 'Submit', 'Change Effort', 'Send Back', and a 'More' dropdown menu.

- Note: If your Effort Reviewer made changes to your certification before routing it to your attention, you will note that it states 'Changed' in the upper-right corner of the screen. You can always view what your certification looked like before and after the changes on the tab titled, 'Details'.



The screenshot shows the 'Administrative Review' tab for an 'Effort Certification for (Employee Name)' dated 12/27/2015 - 07/02/2016. The 'Effort Certification Status' is 'In Progress'. In the upper right corner, a red circle highlights the text 'Changed Status Changed'. Below this, it says '5 day(s) ago - Due 04/29/2016' and 'Total Certified Percentage Estimated 100.0%'. A certification statement is provided, followed by a checkbox labeled 'I Certify'.

Workday Effort Certification – Employee (cont.)

SCENARIO 1: IF NO CHANGES ARE REQUIRED:

1. If you agree that the effort statement is correct and ready to certify, simply click the box next to 'I Certify' and then 'Submit' and it will be automatically routed to the Effort Manager.

Note: checking this box means that you agree with the following statement,

"I certify that I have first-hand knowledge of (or have suitable means of verifying) that the effort percentages contained in this report reasonably represent the actual effort expended on each project listed for the period covered. I am aware that any false, fictitious or fraudulent information may subject me to criminal, civil or administrative penalties. (U.S. Code, Title 18, Section 1001)."

Review Effort

Effort Certification for (Employee Name) for 01/01/2016 - 06/30/2016

Effort Certification for 01/01/2016 - 06/30/2016

3 minute(s) ago - Due 04/05/2016

Total Certified Percentage Estimated 100.0%

I certify that I have first-hand knowledge of (or have suitable means of verifying) that the changes to the distribution percentages reasonably represent the actual effort expended on each project listed for the period covered. I am aware that any false, fictitious or fraudulent information may subject me to criminal, civil or administrative penalties. (U.S. Code, Title 18, Section 1001).

I Certify ☒

Summary Details Positions

Effort Certification Summary

Worktags	Certified Amount Estimated	Certified Percentage of Group Estimated	Certified Percentage of Total Estimated

Submit Change Effort Save for Later Cancel

Workday Effort Certification – Employee (cont.)

- The following screen will appear showing that you successfully submitted the report.
Note that in this example where no changes were made, the effort certification will next route to the Effort Manager in Research Finance.

Success! Event submitted

Effort Certification for (Employee Name) for 01/01/2016 - 06/30/2016

3 minute(s) ago - Due 04/05/2016

Up Next

Effort Certification Manager

Approval by Effort Certification Manager

Due Date 04/12/2016

Details and Process

Done

- Clicking 'Details and Process' and navigating to 'Process' will show you exactly where the Effort Certification is in the business process and who is up next. Click 'Done' at the bottom-left of the screen to return to the home menu.

Details | Process

Process History 7 items

Process	Step	Status	Completed On	Due Date	Person	Comment
Effort Certification	Effort Certification	Step Completed	04/15/2016 10:44:40 AM	06/15/2016	Kalina Mathurin	
Effort Certification	Administrative Review	Submitted	04/27/2016 08:08:17 AM	04/29/2016	(Effort Certification Reviewer)	
Effort Certification	Review Your Effort Allocation by Pay Period	Submitted	04/27/2016 08:10:39 AM	05/04/2016	(Employee As Self)	
Effort Certification	Approval by Effort Certification Reviewer	Not Required		06/15/2016		
Effort Certification	Approval by Effort Certification Manager	Awaiting Action		05/11/2016	Alexandria Hui Tran (Effort Certification Manager)	
					Fiorella Chavez (Effort Certification Manager)	
					Kalina Mathurin (Effort Certification Manager)	

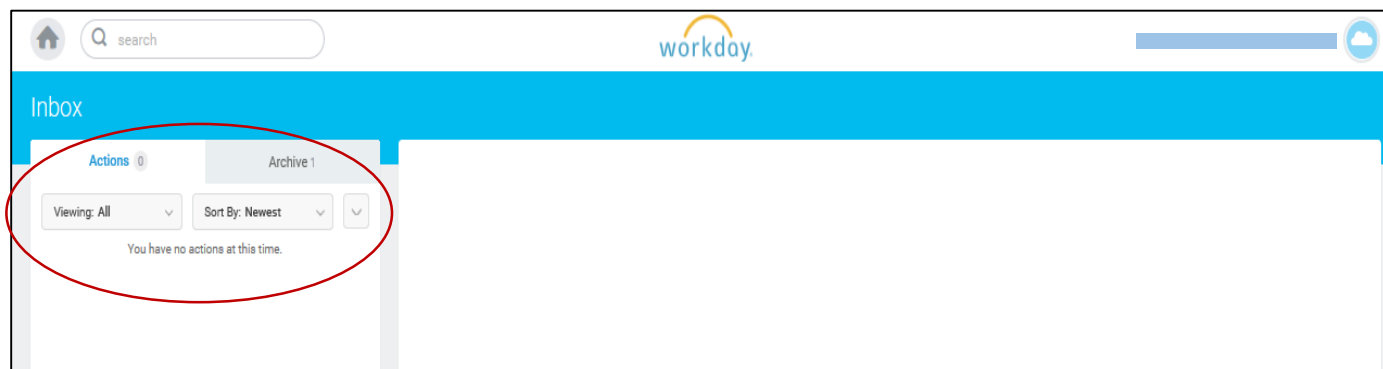
Done

Process

Click below to review remaining process details.

Workday Effort Certification – Employee (cont.)

4. Notice that your inbox automatically moved the effort certification from the 'Actions' box to the 'Archive' box. You can always go back and view a certified report in your 'Archive' box.



Workday Effort Certification – Employee (cont.)

Scenario 2: REALLOCATING EFFORT PERCENTAGES BETWEEN EXISTING LINES

The following steps will explain how to redistribute percentages of effort across cost centers that are already included on the Effort Certification.

1. In this example, starting with the Details screen, we see that this is an employee whose time is allocated between two cost centers; 70% attributed to one cost center and 30% to the other. Let's assume that these percentages should have been assigned in the reverse order.

Period	Worktags		Original Percent	Certified Percentage of Period Estimated
	Payroll	Costing		
12/27/2015 - 01/02/2016 (Boston Medical Weekly)	Pay Group: BMC Weekly	Cost Center: 100.6003351.0335104 Intensive Models of HCV Care for Injection Drug Users	30.0%	30.0%
	Pay Group: BMC Weekly	Cost Center: 100.6003235.0323501 Simulation Modeling to Improve HIV/HCV Screening, Treatment & Care	70.0%	70.0%
	Total:		100.0%	100.0%
01/03/2016 - 01/09/2016 (Boston Medical Weekly)	Pay Group: BMC Weekly	Cost Center: 100.6003351.0335104 Intensive Models of HCV Care for Injection Drug Users	30.0%	30.0%
	Pay Group: BMC Weekly	Cost Center: 100.6003235.0323501 Simulation Modeling to Improve HIV/HCV Screening, Treatment & Care	70.0%	70.0%
	Total:		100.0%	100.0%
01/10/2016 - 01/16/2016 (Boston Medical Weekly)	Pay Group: BMC Weekly	Cost Center: 100.6003351.0335104 Intensive Models of HCV Care for Injection Drug Users	30.0%	30.0%
	Pay Group: BMC Weekly	Cost Center: 100.6003235.0323501 Simulation Modeling to Improve HIV/HCV Screening, Treatment & Care	70.0%	70.0%
	Total:		100.0%	100.0%
01/17/2016 - 01/23/2016 (Boston Medical Weekly)	Pay Group: BMC Weekly	Cost Center: 100.6003235.0323501 Simulation Modeling to Improve HIV/HCV Screening, Treatment & Care	70.0%	70.0%
	Pay Group: BMC Weekly	Cost Center: 100.6003351.0335104 Intensive Models of HCV Care for Injection Drug Users	30.0%	30.0%
	Total:		100.0%	100.0%

Buttons: Submit, **Change Effort**, Save for Later, Cancel

2. Click 'Change Effort' in the bottom-left corner to begin the process

Workday Effort Certification – Employee (cont.)

3. You should now see a new column titled, 'Change Reason' with blank fields in each row.

Administrative Review Effort Certification for (Employee Name) 12/27/2015 - 07/02/2016

Effort Certification for 12/27/2015 - 07/02/2016 5 day(s) ago - Due 04/29/2016

Total Certified Percentage Estimated 100.0%

Effort Certification 4 items

Period		Worktags		Original Percent	Change Reason	Certified Percent Estimated	Order
		Payroll	Costing				
12/27/2015 - 01/02/2016 (Boston Medical Weekly)	+						
	+	Pay Group: BMC Weekly	Cost Center: 100.6003235.0323501 Simulation Modeling to Improve HIV/HCV Screening, Treatment & Care	70.0%		70	▼
	+	Pay Group: BMC Weekly	Cost Center: 100.6003351.0335104 Intensive Models of HCV Care for Injection Drug Users	30.0%		30	▲
				100%		-100	
01/03/2016 - 01/09/2016 (Boston Medical Weekly)	+						
	+	Pay Group: BMC Weekly	Cost Center: 100.6003235.0323501 Simulation Modeling to Improve HIV/HCV Screening, Treatment & Care	70.0%		70	▼
	+	Pay Group: BMC Weekly	Cost Center: 100.6003351.0335104 Intensive Models of HCV Care for Injection Drug Users	30.0%		30	▲
				100%		-100	

4. Click the cursor in the blank field. Click the icon to the right of the field and a drop down menu will appear. Choose 'All Reason Codes' and then select the appropriate reason code (i.e. 05 Effort Adjustment).

Categories

- All Reason Codes >
- Costed Reason Codes >
- Non-Costed Reason Codes >

search

← All Reason Codes

- 01 Hired Into Incorrect AU
- 02 Delayed Employee Transfer
- 03 Business Change/Reorganization
- 04 New Research Project
- 05 Effort Adjustment
- 06 Cost Share
- 07 Salary Cap
- 08 Other Administrative

Note: this will need to be repeated for each pay period and cost center that require adjustment.

Workday Effort Certification – Employee (cont.)

- The field boxes are now editable in the column titled, 'Certified Percent Effort'. This is where we will make changes to the effort distributions. The numbers always default to the original percentage amounts.

Change Reason	Certified Percent Estimated
05 Effort Adjustment	70
05 Effort Adjustment	30
	100

- Change the effort % on each line and verify that the total at the bottom of the column still sums to 100%.
- When you are satisfied with the changes, click 'OK' at the bottom-left of the screen.

Workday Effort Certification – Employee (cont.)

8. You will now notice two things: 1) the Changed Status is now 'Changed', and 2) the Summary percentages have changed to reflect the changes made to the Details

Administrative Review
Effort Certification for (Employee Name)
12/27/2015 - 07/02/2016

Effort Certification for
12/27/2015 - 07/02/2016
Effort Certification Status
In Progress

Changed Status
Changed

5 day(s) ago - Due 04/29/2016

Total Certified Percentage Estimated 100.0%

I certify that I have first-hand knowledge of (or have suitable means of verifying) that the distribution percentages contained on this effort certification reasonably represent the actual effort expended on each project listed for the period covered. I am aware that any false, fictitious or fraudulent information may subject me to criminal, civil or administrative penalties. (U.S. Code, Title 18, Section 1001).

I Certify ☐

Summary
Details
Positions

Questions

Summary 3 items

Effort Certification Summary			
	Worktags	Certified Percentage of Group Estimated	Certified Percentage of Total Estimated
Research Grants	100.6003235.0323501 Simulation Modeling to Improve HIV/HCV Screening, Treatment & Care BMC Weekly	60.1%	60.1%
	100.6003351.0335104 Intensive Models of HCV Care for Injection Drug Users BMC Weekly	39.9%	39.9%
	Total:	100.0%	100.0%

Submit
Change Effort
Save for Later
Cancel

9. Before you can submit this changed statement you must write a short description explaining any changes. Click on the tab titled, 'Questions'.

Workday Effort Certification – Employee (cont.)


10. The field box is used to explain how changes to effort benefit the project(s). Use the toggle icon to open a larger window.

Enter the justification for the modification in the 'Answer' field.

Summary | Details | Positions | Questions

Name Effort Change Questionnaire

Question Explain how changes to effort benefit the project(s)?

Answer * Normal **B** **I** U 

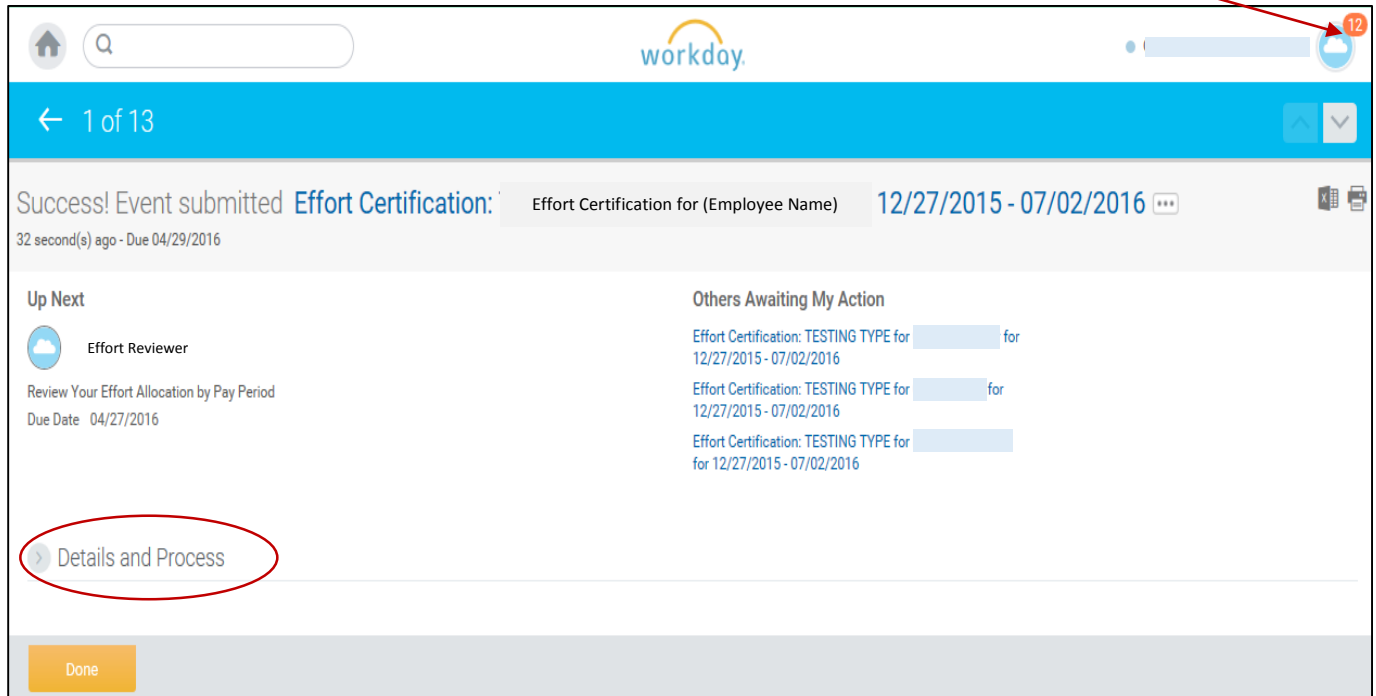
The percentages were entered incorrectly and now reflect where the employee expended time and effort for the period in question. In the future, a master log of allocation percentages will be maintained and cross-referenced before entering anything into the time and effort system.

Submit Change Effort Save for Later Cancel

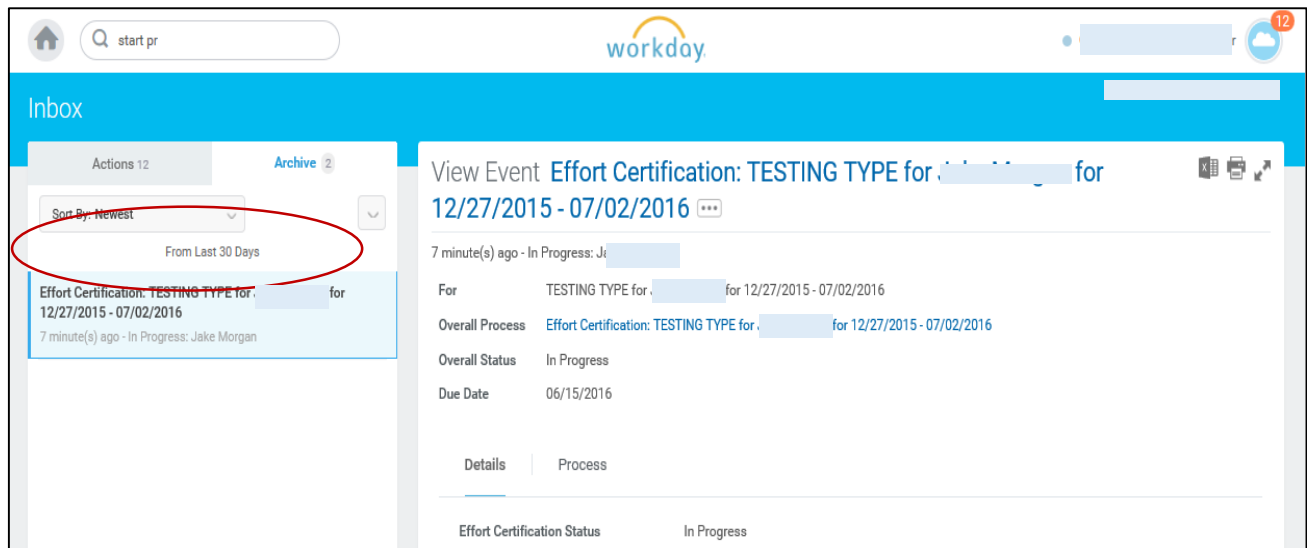
11. If the effort report is correct and ready to certify, simply click the box next to 'I Certify' and then 'Submit' and it will be automatically routed to the Effort Reviewer for final review/approval.

Workday Effort Certification – Employee (cont.)

12. The following screen will appear showing that you successfully submitted the report. Click on Details and Process to see routing information. Note that your Inbox count went down by one.



13. Once you submit a statement you will notice that it moves from your 'Actions' inbox to your 'Archive' inbox.



Workday Effort Certification – Employee (cont.)

SCENARIO 3: ADDING/REMOVING A COST CENTER

The following steps will explain how to add a cost center that is not already included on the effort statement and redistributing effort across the cost centers.

1. Open your effort certification and click 'Change Effort' button located on the bottom-left of the screen

The screenshot shows the Workday Effort Certification interface. At the top, there is a search bar and the Workday logo. Below the header, a blue bar indicates the current step is 5 of 6. The main content area is titled 'Administrative Review' and shows the 'Effort Certification for (Employee Name)' for the period 12/27/2015 - 07/02/2016. The status is 'In Progress' and 'Unchanged'. A message states: 'While several Effort Certification security roles may initiate the institution-wide Effort Certification Process, a second person (An Effort Certification Reviewer who is not the initiator) needs to review the process before it is launched to the individual members whose effort is being reviewed by the team lead.' Below this, it shows 'Total Certified Percentage Estimated 100.0%'. A certification statement follows: 'I certify that I have first-hand knowledge of (or have suitable means of verifying) that the distribution percentages contained on this effort certification reasonably represent the actual effort expended on each project listed for the period covered. I am aware that any false, fictitious or fraudulent information may subject me to criminal, civil or administrative penalties. (U.S. Code, Title 18, Section 1001).' There is a checkbox for 'I Certify'. At the bottom, there are four buttons: 'Submit', 'Change Effort' (circled in red), 'Save for Later', and 'Cancel'.

Workday Effort Certification – Employee (cont.)

- To add a line, you must copy an existing line and then change the information contained in that line. Click on the '+' sign located on the left side of an existing row.

Effort Certification 4 items

Period		Worktags		Original Percent	Change Reason	Certified Percent Estimated	Order
		Payroll	Costing				
12/27/2015 - 01/02/2016 (Boston Medical Weekly)	+						
	+	Pay Group: BMC Weekly	Cost Center: 100.6003652.0365201 Project ACHIEVE: Achieving Patient-Centered Care and Optimized Health in Care Transitions by Evaluat	100.0%		100	
				100%		100	
01/03/2016 - 01/09/2016 (Boston Medical Weekly)	+						
	+	Pay Group: BMC Weekly	Cost Center: 100.6003652.0365201 Project ACHIEVE: Achieving Patient-Centered Care and Optimized Health in Care Transitions by Evaluat	100.0%		100	
				100%		100	
01/10/2016 - 01/16/2016 (Boston Medical Weekly)	+						
	+	Pay Group: BMC Weekly	Cost Center: 100.6003652.0365201 Project ACHIEVE: Achieving Patient-Centered Care and Optimized Health in Care Transitions by Evaluat	100.0%		100	

OK Cancel

- You should now see two of the same line. Click the 'X' to the left of 'Cost Center' in the Costing column to remove the duplicate cost center

Effort Certification 4 items

Period		Worktags		Original Percent	Change Reason	Certified Percent Estimated	Order
		Payroll	Costing				
12/27/2015 - 01/02/2016 (Boston Medical Weekly)	+						
	+	Pay Group: BMC Weekly	Cost Center: 100.6003652.0365201 Project ACHIEVE: Achieving Patient-Centered Care and Optimized Health in Care Transitions by Evaluat	100.0%		100	
	+	Pay Group: BMC Weekly	Cost Center: 100.6003652.0365201 Project ACHIEVE: Achieving Patient-Centered Care and Optimized Health in Care Transitions by Evaluat	0.0%		0	
				100%		100	

Workday Effort Certification – Employee (cont.)

- Type the cost center that you want to add in the blank field and press enter. The cost center format in Workday is: Company/AU/Activity in the following format: 123.6001234.0123401. From the drop down menu that appears, click the check-box next to the cost center that you want to add.

Administrative Review Effort Certification for (Employee Name) for 12/27/2015 - 07/02/2016

Effort Certification for 12/27/2015 - 07/02/2016 5 day(s) ago - Due 04/29/2016

Total Certified Percentage Estimated 100.0%

Effort Certification 4 items

Period	Payroll	Original Percent
12/27/2015 - 01/02/2016 (Boston Medical Weekly)		
	Pay Group: BMC Weekly	100.0%
	Pay Group: BMC Weekly	0.0%
		100%

Q 196 Results

- ☐ Cost Center: 100.6003601.0000000 Advancing Geriatrics Infrastructure and Network Growth
- ☐ Cost Center: 100.6003601.0360102 Advancing Geriatrics Infrastructure and Network Growth
- ☐ Cost Center: 100.6003602.0000000 Post Fellowship Salary Support: Dr. Lissy Woodhams

100.60036

Administrative Review Effort Certification for (Employee Name) for 12/27/2015 - 07/02/2016

Effort Certification for 12/27/2015 - 07/02/2016 5 day(s) ago - Due 04/29/2016

Total Certified Percentage Estimated 100.0%

Effort Certification 4 items

Period	Payroll	Original Percent
12/27/2015 - 01/02/2016 (Boston Medical Weekly)		
	Pay Group: BMC Weekly	100.0%
	Pay Group: BMC Weekly	0.0%

Q 196 Results

- ☒ Cost Center: 100.6003601.0000000 Advancing Geriatrics Infrastructure and Network Growth
- ☐ Cost Center: 100.6003601.0360102 Advancing Geriatrics Infrastructure and Network Growth
- ☐ Cost Center: 100.6003602.0000000 Post Fellowship Salary Support: Dr. Lissy Woodhams

search

X Cost Center: 100.6003601.0000000 Advancing Geriatrics Infrastructure and Network Growth

Workday Effort Certification – Employee (cont.)

- Click the cursor anywhere outside of the dropdown box to choose the selected cost center.
Place the cursor in the 'Change Reason' field and click the icon to the right side of the field box.

Administrative Review Effort Certification for (Employee Name) 12/27/2015 - 07/02/2016

Effort Certification for 12/27/2015 - 07/02/2016 5 day(s) ago - Due 04/29/2016

Total Certified Percentage Estimated 100.0%

Effort Certification 4 items

Period		Worktags		Original Percent	Change Reason	Certified Percent Estimated	Order
		Payroll	Costing				
12/27/2015 - 01/02/2016 (Boston Medical Weekly)	+						
	+	Pay Group: BMC Weekly	Cost Center: 100.6003652.0365201 Project ACHIEVE: Achieving Patient-Centered Care and Optimized Health in Care Transitions by Evaluat	100.0%		100	▼▼
	+ -	Pay Group: BMC Weekly	<div> X Cost Center: 100.6003601.0000000 Advancing Geriatrics Infrastructure and Network Growth </div>	0.0%		0	▲▲
				100%		100	

- A drop down menu will appear. Choose 'All Reason Codes' and then select the appropriate reason code (i.e. 05 Effort Adjustment).

The diagram illustrates the process of selecting a reason code. On the left, a dropdown menu titled 'Categories' is shown with three options: 'All Reason Codes', 'Costed Reason Codes', and 'Non-Costed Reason Codes'. A red arrow points from 'All Reason Codes' to a larger dropdown menu on the right titled 'All Reason Codes'. This menu contains eight radio button options: '01 Hired Into Incorrect AU', '02 Delayed Employee Transfer', '03 Business Change/Reorganization', '04 New Research Project', '05 Effort Adjustment', '06 Cost Share', '07 Salary Cap', and '08 Other Administrative'. A second red arrow points from the '05 Effort Adjustment' option back to the 'All Reason Codes' dropdown in the 'Categories' menu.

Note: this will need to be repeated for each pay period and cost center that require adjustment.

Workday Effort Certification – Employee (cont.)

7. You will notice that there is now a field available to add a percentage to the new line.

Period	Worktags		Original Percent	Change Reason	Certified Percent Estimated	Order
	Payroll	Costing				
12/27/2015 - 01/02/2016 (Boston Medical Weekly)						
	Pay Group: BMC Weekly	Cost Center: 100.6003652.0365201 Project ACHIEVE: Achieving Patient-Centered Care and Optimized Health in Care Transitions by Evaluat	100.0%		100	
	Pay Group: BMC Weekly	X Cost Center: 100.6003601.0000000 Advancing Geriatrics Infrastructure and Network Growth	0.0%	X 05 Effort Adjustment	0	
			100%		100	

8. Enter “50” in the Certified Percent Estimated column for the new row and then click in the Change Reason field of the existing line. Note that the total percentage is temporarily “150” (it must be 100 before submitting).

Period	Worktags		Original Percent	Change Reason	Certified Percent Estimated	Order
	Payroll	Costing				
12/27/2015 - 01/02/2016 (Boston Medical Weekly)						
	Pay Group: BMC Weekly	Cost Center: 100.6003652.0365201 Project ACHIEVE: Achieving Patient-Centered Care and Optimized Health in Care Transitions by Evaluat	100.0%		100	
	Pay Group: BMC Weekly	Cost Center: 100.6003601.0000000 Advancing Geriatrics Infrastructure and Network Growth	0.0%	05 Effort Adjustment	50	
			100%		150	

Workday Effort Certification – Employee (cont.)

9. Enter Administrative Correction and “50” into the empty fields in the existing line and then click the cursor anywhere to refresh the total. You should now see that the total is the desired 100%

Period		Worktags		Original Percent	Change Reason	Certified Percent Estimated	Order
		Payroll	Costing				
12/27/2015 - 01/02/2016 (Boston Medical Weekly)	+						
	+	Pay Group: BMC Weekly	Cost Center: 100.6003652.0365201 Project ACHIEVE: Achieving Patient-Centered Care and Optimized Health in Care Transitions by Evaluat	100.0%	X 05 Effort Adjustment	50	
	+ -	Pay Group: BMC Weekly	Cost Center: 100.6003601.0000000 Advancing Geriatrics Infrastructure and Network Growth	0.0%	05 Effort Adjustment	50	
				100%			100
01/03/2016 - 01/09/2016 (Boston Medical Weekly)	+						

OK Cancel

Note: if you need to remove an existing line, enter “0” in the Certified Percent Estimated field

10. Click ‘Ok’ on the bottom-left of the screen when finished making changes

11. Note in the upper-right of the screen that the ‘Changed Status’ now reads ‘Changed’.

Administrative Review Effort Certification for (Employee Name) 12/27/2015 - 07/02/2016

Effort Certification for 12/27/2015 - 07/02/2016

5 day(s) ago - Due 04/29/2016

Total Certified Percentage Estimated 100.0%

I certify that I have first-hand knowledge of (or have suitable means of verifying) that the distribution percentages contained on this effort certification reasonably represent the actual effort expended on each project listed for the period covered. I am aware that any false, fictitious or fraudulent information may subject me to criminal, civil or administrative penalties. (U.S. Code, Title 18, Section 1001).

I Certify ☐

Summary Details Positions Questions

Summary 3 items

Effort Certification Summary		
Worktags	Certified Percentage of Group Estimated	Certified Percentage of Total Estimated

Submit Change Effort Save for Later Cancel

Workday Effort Certification – Employee (cont.)

12. Before you can submit a changed effort statement you must write a short description regarding the changes. Click on the tab titled, 'Questions'. The field box is used to explain how changes to effort benefit the project(s). Use the toggle icon to open a larger window.

Summary | Details | Positions | **Questions**

Name Effort Change Questionnaire

Question Explain how changes to effort benefit the project(s)?

Answer * Normal [B I U A] [List Icon] [Link Icon] [Toggle Icon]

13. Enter the justification for the modification in the 'Answer' field and click 'Done'.

Total Certified Percentage Estimated 100.0%

I certify that I have first-hand knowledge of (or have suitable means of verification) that the information provided is true and accurate. I am aware that any false, fictitious or fraudulent information may subject me to disciplinary action.

I Certify ☐

Summary | Details | Positions | **Questions**

Name Effort Change Questionnaire

Question Explain how changes to effort benefit the project(s)?

Answer * Due to an unforeseen delay in the execution of the award, this cost center was not set up in the system until after the award period began. The employee has been working on the project for the period of this effort statement and charging the related salary to an administrative account. This correction will move the effort to the correct cost center.

enter your comment

Process History
Effort Certification- Step Completed
Alexandria Hui Tran - Due 11/16/2015

Submit Review **Change Effort** Save for Later Cancel

Done

Workday Effort Certification – Employee (cont.)

14. If you are satisfied with the justification, click 'Submit' in the lower-left corner and the effort statement will be automatically routed to the Effort Reviewer for their final review/approval.

Name Effort Change Questionnaire

Question Explain how changes to effort benefit the project(s)?

Answer * Normal Due to an unforeseen delay in the execution of the award, this cost center was not set up in the system until after the award period began. The employee has been working on the project for the period of this effort statement and charging the related salary to an administrative account. This correction will move the effort to the correct cost center.

enter your comment

Process History

Effort Certification- Step Completed

Alexandria Hui Tran - Due 11/16/2015

Administrative Review- Awaiting Action

Effort Reviewer - Due 09/30/2015

Submit Change Effort Save for Later Cancel

15. The following screen will appear showing that you successfully submitted the report. Click 'Done' to return to the home menu.

Success! Event submitted 5 day(s) ago - Due 04/29/2016

Effort Certification for (Employee Name) for 12/27/2015 - 07/02/2016

Up Next

Vivian

Review Your Effort Allocation by Pay Period

Due Date 04/27/2016

Others Awaiting My Action

Effort Certification: TESTING TYPE for 12/27/2015 - 07/02/2016

Effort Certification: TESTING TYPE for 12/27/2015 - 07/02/2016

Effort Certification: TESTING TYPE for 12/27/2015 - 07/02/2016

Details and Process

Done

Workday Effort Certification – Employee (cont.)

16. Once you submit a report you will notice that it moves from your 'Actions' inbox to your 'Archive' inbox

