

Bi-Annual Effort Reporting Step by Step Instructions (January 1 – June 30) or (July 1 – December 31)

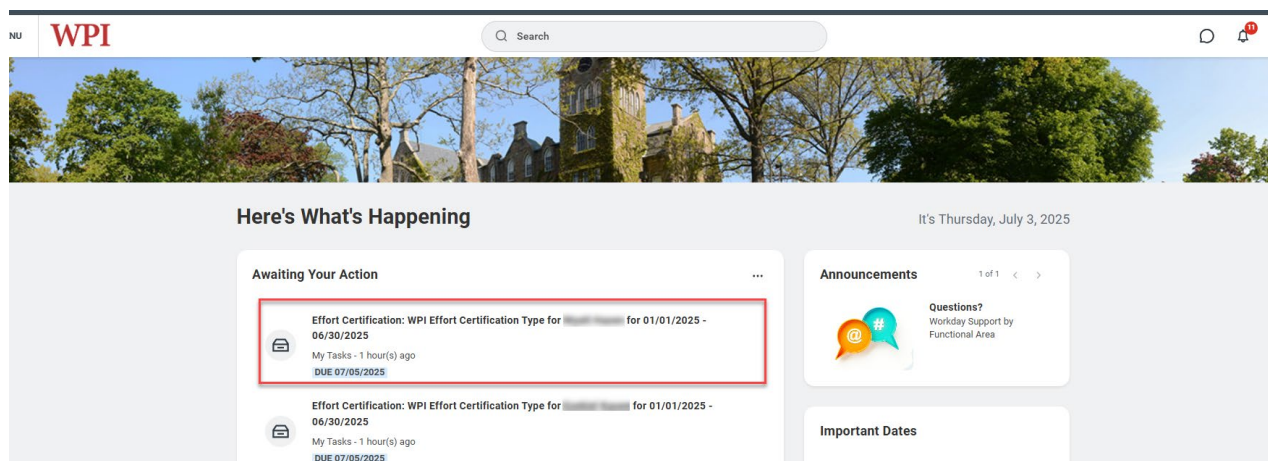
1) What is effort reporting?

As a recipient of federal funding, WPI is required, per Uniform Guidance, to validate that the salary charged to sponsored awards (grants, contracts, and cooperative agreements) represents the actual effort put toward the scope of work of these awards. All individuals whose salary is directly charged or cost shared to a grant worktag or to a service center must be verified.

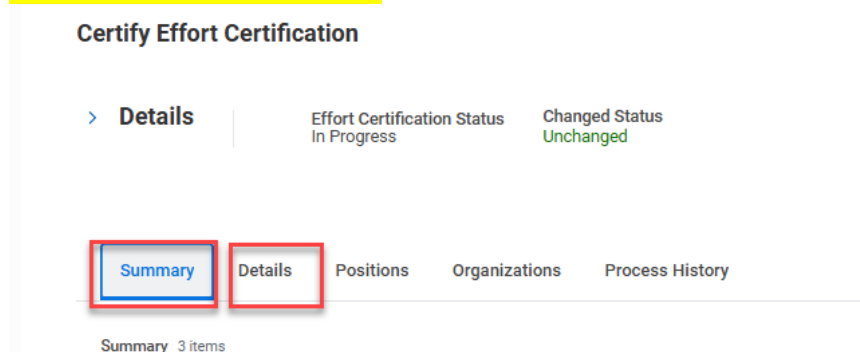
2) What do I do?

Effort certification is a process in Workday. Here are the screens you will be interacting with:

First Step: In your inbox you will see Effort Certification(s), they will be in your inbox with other workday pending tasks and approvals that need your action:



Second Step: You will see a lot of information listed. Across the top you will see different tabs. The two (on the far left) that you need to review and confirm are **Summary** and **Details**:



SUMMARY TAB lists the individuals’ name, all worktags that salary has been charged to, the amount charged to each worktag, and the percentage of total salary charged for the effort reporting period.

Q Search

Certify Effort Certification

> Details

Effort Certification Status
In Progress

Changed Status
Unchanged

Summary

Details

Positions

Organizations

Process History

Summary 3 items

Effort Certification Summary

	Worktags	Certified Amount Estimated	Certified Percentage of Group Estimated	Certified Percentage of Total Estimated
	Cost Center: 1028-CC Mechanical and Materials Engineering Employee: Fund: 110-FD Unrestricted		75.5501%	75.5501%
	Cost Center: 1028-CC Mechanical and Materials Engineering Employee: Fund: 210-FD Sponsored Programs Grant:		24.4499%	24.4499%
	Total:		100.00%	100.00%

DETAILS TAB drills down further to show you the salary per pay period for the individual – hourly, undergraduate and graduate students will be bi-weekly, faculty and exempt staff will be monthly.

Summary

Details

Positions

Organizations

Process History

Click here to sort

01/01/2025 - 01/31/2025
(Monthly Exempt)

02/01/2025 - 02/28/2025
(Monthly Exempt)

03/01/2025 - 03/31/2025
(Monthly Exempt)

04/01/2025 - 04/30/2025
(Monthly Exempt)

05/01/2025 - 05/31/2025
(Monthly Exempt)

06/01/2025 - 06/30/2025
(Monthly Exempt)

Effort Certification Lines

Effort Period 06/01/2025 - 06/30/2025 (Monthly Exempt)

3 items

Effort Grant	Payroll Periods	Payroll	Costing
	06/01/2025 - 06/30/2025 (Monthly Exempt)	Earning: Base Pay - Academic Employee: Job Profile: Associate Professor-Engineering Pay Group: Monthly Exempt Position: Associate Professor More (2)	Cost Center: 1028-CC Mechanical and Materials Engineering Fund: 110-FD Unrestricted Location: Worcester Program: 100 Instruction
	06/01/2025 - 06/30/2025 (Monthly Exempt)	Earning: Summer Salary Employee: Job Profile: Associate Professor-Engineering Pay Group: Monthly Exempt Position: Associate Professor More (2)	Cost Center: 1028-CC Mechanical and Materials Engineering Fund: 210-FD Sponsored Programs Grant: Location: Worcester Program: 200 Sponsored Research
Total:			

3) What does this information mean? An example:

Cost Center: 1028-CC Mechanical and Materials Engineering
Employee: [REDACTED]
Fund: 210-FD Sponsored Programs
Grant: [REDACTED]

** please keep in mind that this is a sample and you should see the specific department and grant worktag information supporting the individual**

- **Cost Center:** 1028-CC Mechanical and Materials Engineering documents the department affiliation for the grant worktag
- **Grant:** Will list your grant worktag XXXXX-GR Research Project Title
- **Fund:** 210 FD- Sponsored Programs – each type of funding source has a unique fund. Here are the different fund options you will see:
 - 110-FD operating budget
 - 120-FD designated
 - 130-FD grant – cost share
 - 150-FD service center
 - 210-FD grant – direct charges
 - 220-FD gift

4) Approving the report.

If all the information you review is accurate and you are ready to approve, here are your final two steps that include seeing the certification language and submission of the certification.

Click on the details tab, click the carrot to the left to open the details information and see the certification clause automatically embedded in workday:

What if the individual has worked with another department or another faculty member?

The regulations require that the person certifying the report must have firsthand knowledge of the employee's effort distribution. Faculty and staff typically self-certify their own reports and PI's certify for students.

If there are other departments or another faculty member who also needs to review and certify a report, you can add an additional approver. Instead of clicking submit, you will click on ADD APPROVERS. When the next screen shows, you can add the name of the person who also needs to approve, make sure their name is in the box and then click "approve and send to approvers".

Only take this step once you are confident the information is correct as that approval is your CERTIFICATION and sends the worktag link to the additional approver.

The screenshot shows the 'Certify Effort Certification' interface. At the top, there is a search bar and navigation icons. Below the title, there are tabs for 'Details', 'Effort Certification Status' (In Progress), and 'Changed Status' (Unchanged). Under the 'Details' tab, there are sub-tabs: 'Summary', 'Details', 'Positions', 'Organizations', and 'Process History'. The 'Summary' tab is active, showing a table titled 'Effort Certification Summary'.

Worktags	Certified Amount Estimated	Certified Percentage of Group Estimated	Certified Percentage of Total Estimated
Cost Center: 1028-CC Mechanical and Materials Engineering Employee: [redacted] Fund: 110-FD Unrestricted	[redacted]	75.5501%	75.5501%
Cost Center: 1028-CC Mechanical and Materials Engineering Employee: [redacted] Fund: 210-FD Sponsored Programs Grant: [redacted]	[redacted]	24.4499%	24.4499%
Total:	[redacted]	100.00%	100.00%

Below the table, there is a comment box with the text 'comments will be saved with the certified record'. To the right of the comment box, there is a red arrow pointing to the 'Add Approvers' button with the text 'add additional approvers, if needed'. At the bottom, there are four buttons: 'Submit' (crossed out with a red X), 'Change' (crossed out with a red X), 'Add Approvers', and 'Save Later' (crossed out with a red X).

Add Approvers

The next step in the process will not happen until the additional approvals are done.

Additional Approvers *

Comment

Approve and Send to Approvers

Cancel

YOU HAVE COMPLETED THE CERTIFICATION.

Congratulations!

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IF YOU HAVE ANY QUESTIONS OR NEED TO MAKE A CHANGE



What to do now if you have a question or want to make a change?
Should I communicate changes or send questions through workday – **NO!**

If you have **ANY** questions or would like to make a change to someone's effort
do NOT do ANYTHING in workday,
just leave the certification record in your workday listing
&

Please send an email to grantaccounting@wpi.edu

PLEASE DO NOT CLICK ANYTHING if you have any questions or changes!

Do **NOT** click the change effort tab
Do **NOT** click submit with comments
Do **NOT CLICK ANYTHING!!!!!!**

Any clicks in workday will send the record to be finalized and DOES NOT COME BACK TO SPA to assist you
in addressing changes.

The **ONLY** way to ask a questions or request changes or anything other than to approve by hitting SUBMIT
CERTIFICATION, please, send an email to grantaccounting@wpi.edu.