# Online Effort Reporting

**Intro**
- Purpose
- Log In

**Report**
- Open your effort report
- Review pay period summary

**Actions**
- Request changes
- Certify the report
- Print & close

**Students**
- Search for student/other grant personnel reports
- Review student/other grant personnel reports
- Review routing queue

**All Done**
- Sign Out
- Thank you for your prompt attention

# Online Effort Reporting     January 7, 2015

## INTRODUCTION

WPI is required by Federal Regulations to maintain an Effort Reporting System as a means to ensure salaries and wages charged or cost shared to sponsored research awards reasonably reflect the actual time devoted to the project.

Each report must be certified by the employee or a responsible person with suitable means of verification that the work was performed.  The WPI Effort Reporting policy states that the effort report will be prepared semiannually, at the end of January and July, for the previous six month period.  The report should be certified within ten business days of report availability.

Beginning in January, 2012, the WPI effort report is now paperless. Using Banner Self Service, the effort report will be produced, reviewed and certified electronically.  As a PI, you will log into Banner Self Service to view and certify the reports for yourself and/or for students and other personnel paid or cost shared from your grant funds.  If you believe the report does not accurately reflect the effort, please contact the Sponsored Research Accounting Office.

Please follow the instructions below to view and certify your report and your other grant personnel reports.  Once certified, the reports are electronically routed to the Sponsored Research Accounting Office.  You do not need to print any of the forms and they will remain available online for seven years.

**LOG IN**

**To log into the Banner Self Service System, from Internet Explorer:  Go to:  BANNERWEB.WPI.EDU**

**Note:  If you are off campus, you should use the VPN.**

**Visit  Virtual Private Network for more information about WPI's VPN.**

**LOG IN WITH YOUR USER NAME AND PASSWORD**

**If you forgot your password, contact the Helpdesk at 508-831-5888 or email helpdesk@wpi.edu.**



**WPI** **Web Information System**

Members of the WPI Community may now Login to the WPI Web Information System using any of the following:

- Windows Username and Password
- Social Security Number and PIN
- WPI ID and PIN (Faculty may use their WPI assigned initials)
  Please note: Your PIN is a minimum of 6 and a maximum of 20 AlphaNumeric characters.
  Click here if you have forgotten your PIN.

Between 2 a.m. EST and 5:30 a.m. EST the server may be unavailable.

To protect your privacy, please Exit and then close your browser when you are finished.

** Tuition Bills and Payment Options **

Look at your latest invoices and account information by selecting the Student Services tab and choosing the option titled **e-Bills and e-Payments** or Click here to make payment without a WPI PIN

WPI Username: ydharris
Password: ••••••••••••

[Login]
OR
*WPI ID Number: [        ]
PIN: [        ]
[Login]  [Reset PIN]
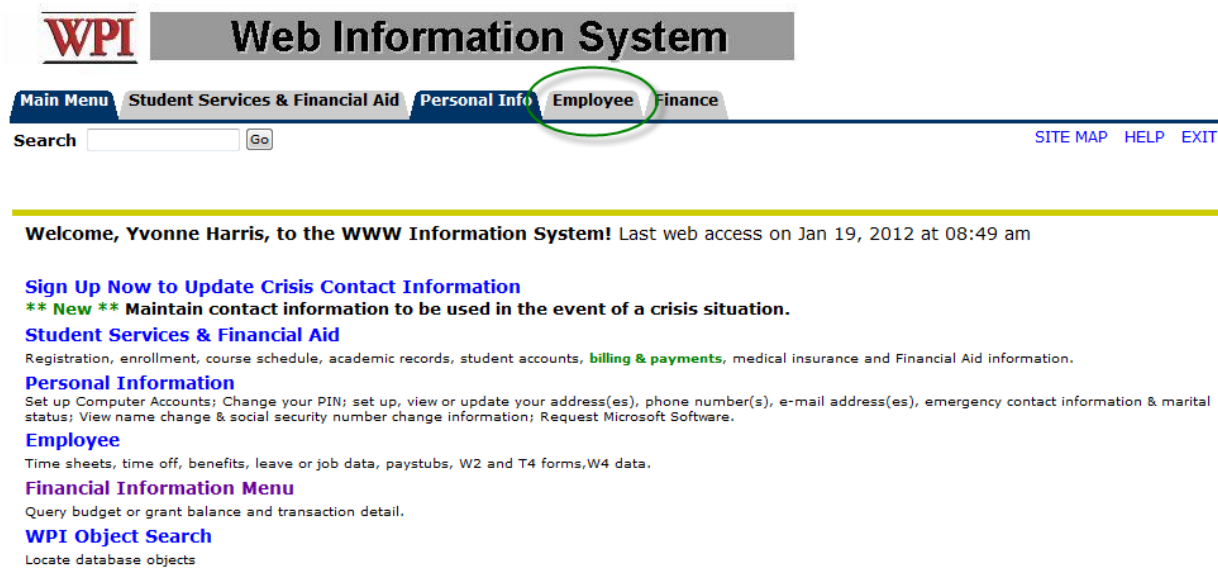
*ID Required to Reset PIN

Forgot PIN?
RELEASE: 8.3.1

## SELECT EMPLOYEE TAB

**Once you have logged into the Banner Self Service system, select the Employee Tab**



## SELECT EFFORT CERTIFICATION

**Once in the Employee menu, scroll all the way to the bottom and select Effort Certification**

| Step 2: |
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**OPEN YOUR EFFORT REPORT**

**If you received salary expensed to a grant during the effort reporting period, a line of information will appear under the heading Certify My Effort. DOUBLE Click on the period code, or any other value on that line, to open the effort report. The Period Code is a six digit code consisting of the fiscal year and semester. For example 201201 reflects effort during July 2011-December 2011 (this is in fiscal year 2012). The next effort period will be named 201202, covering January 2012-June 2012 pay events.**



| Step 3: |
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**REVIEW YOUR EFFORT REPORT**

**The online effort report lists all Banner funds (both Sponsored and Non Sponsored) that you were paid from during the six month effort period. The rightmost column of the report displays the percentage of effort each Banner fund was charged during the six month effort period.**

| Step 4: |
| --- |

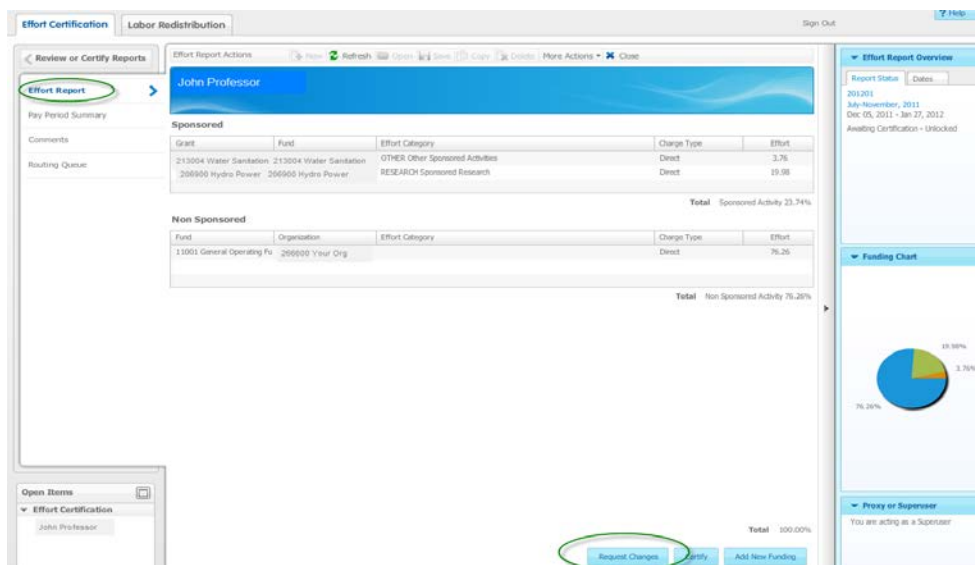**REVIEW PAY PERIOD SUMMARY**

**The Pay Period Summary will provide effort percentages by pay period, with each pay period totaling 100%. Review of this detail will provide the explanation for the calculation of the Effort Period effort percentages on the Effort Report.**
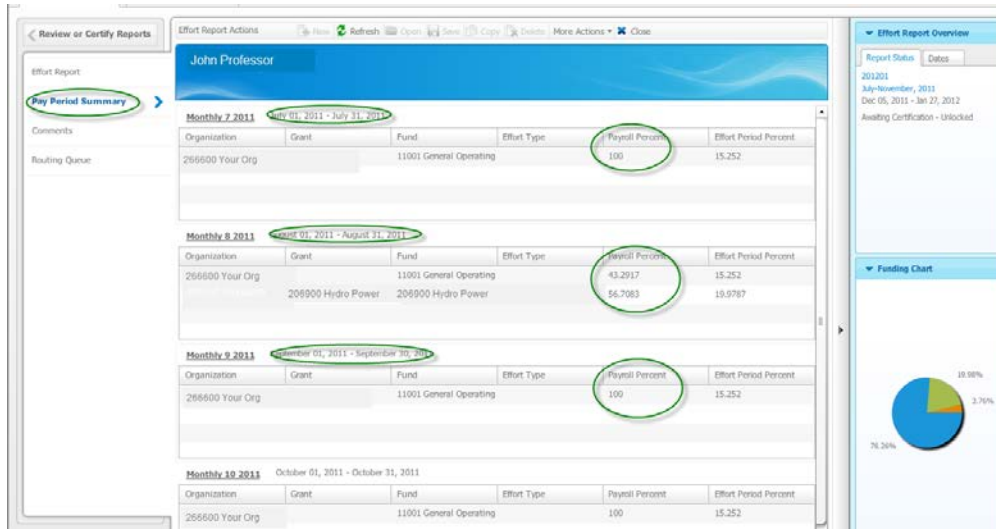


| Step 5 |
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**REQUEST CHANGES TO THE REPORT (if needed)**

**If you still have questions about the effort report, even after reviewing the Pay Period Summary, return to the Effort Report (click on Effort Report in upper left section) and select Request Changes. This will launch an email message, with the subject line already prepopulated.** **Insert the "TO" address for Heather Bilotta,** **Manager of Sponsored Research Accounting. Her WPI email address is hbilotta@wpi.edu. Type a brief message regarding your question or concern. Heather will review your comments and communicate with you regarding the effort report. The status for this report will be changed to Changes Requested.**

| *Step 6* |
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**CERTIFY YOUR REPORT**

**If you agree with the effort percentages, click Certify.**



**The certification statement will pop up, then click I Agree.**

| Step 7 |
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**PRINT THE REPORT (Optional)**

**If you would like to print a copy of your report, select More Options and Print. An image of the report will display, then click on the printer icon to print. This is an optional step. You are not required to print the report. It will be routed to the Sponsored Research Accounting Office electronically.**



| Step 8 |
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**CLOSE THE REPORT**

**Once a report is certified OR changes have been requested, the report status will change to completed and locked. You have just certified your effort report and it will be visible to Sponsored Research Accounting. After you have certified or requested changes, close the report by clicking the blue X next to the word Close.**

**SEARCH FOR OTHER REPORTS AWAITING YOUR CERTIFICATION**

Once <u>your own</u> effort report is completed and closed, you must <u>search for additional effort reports awaiting your certification as PI</u>. The additional reports are for students and other personnel paid from your grant.

**Select Review or Certify Reports**
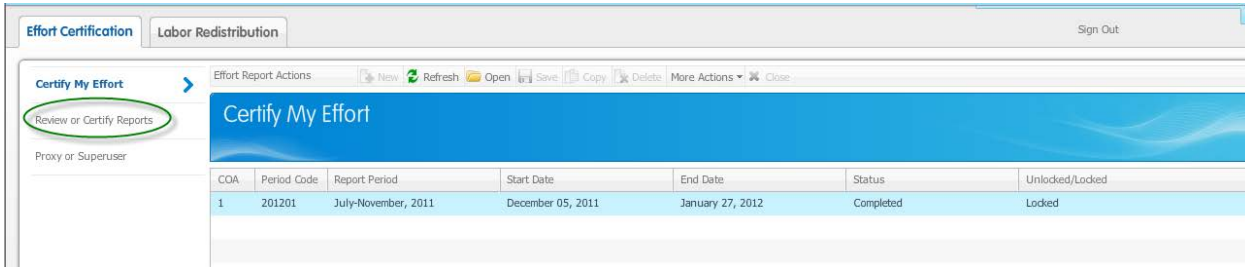


**ADVANCED SEARCH**

Perform a search for additional reports by clicking on the drop down arrow next to the Advanced Search option.
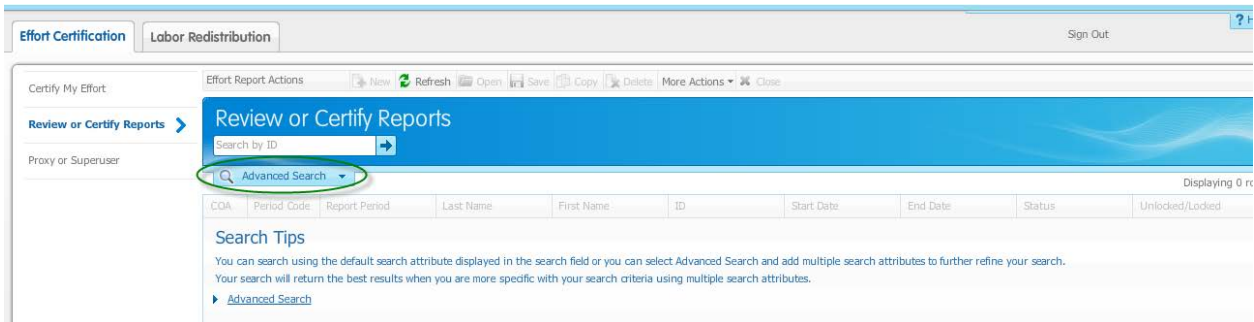


**SELECT ATTRIBUTE**

Now, select the attribute on which you will search. Click on the drop down arrow next to Select Attribute and scroll down all the way to the bottom to Status.

**STATUS EQUALS AWAITING CERTIFICATION**

When Status selected is Awaiting Certification, select GO.  The system may take 30 to 60 seconds for processing.



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**Step 10**

**REVIEW AND CERTIFY REMAINING REPORTS**

If you have additional reports awaiting certification, one line of data will appear for each report you must review.  In this example, a report for John Doe requires your certification.  Now follow the same procedures that you followed to review and certify your effort report. Double click on the name to begin the review.

## REVIEW AND CERTIFY THE EFFORT REPORT

Review the effort report and, if in agreement, select Certify. If you do not agree with the effort report, select Request Changes to generate an email message to Heather Bilotta.  Next, close the report.



## REVIEW AND CERTIFY ALL REMAINING EFFORT REPORTS

When you close the report, you will be returned to the list of reports under your review.  Repeat the steps to review and certify all effort reports that are Awaiting Certification.

**Multiple Grants/Routing Queue**

**A STUDENT OR OTHER GRANT PERSONNEL PAID ON MULTIPLE GRANTS, EACH WITH A DIFFERENT PI, REQUIRE CERTIFICATION FROM THE PI FROM EACH GRANT**

If a student or other personnel is paid from multiple grants, each of which are under the responsibility different PI's, the effort report must be certified by a PI or COPI from each grant he or she received payment from.  For example, if a student was paid from grant 1, managed by Prof. X, and also received payment from grant 2, managed by Prof. Y, both professors X and Y are required to sign the effort report. The required approvals are displayed  in the Routing Queue.

You can view the Routing Queue by clicking on the words Routing Queue on the left side of the page.
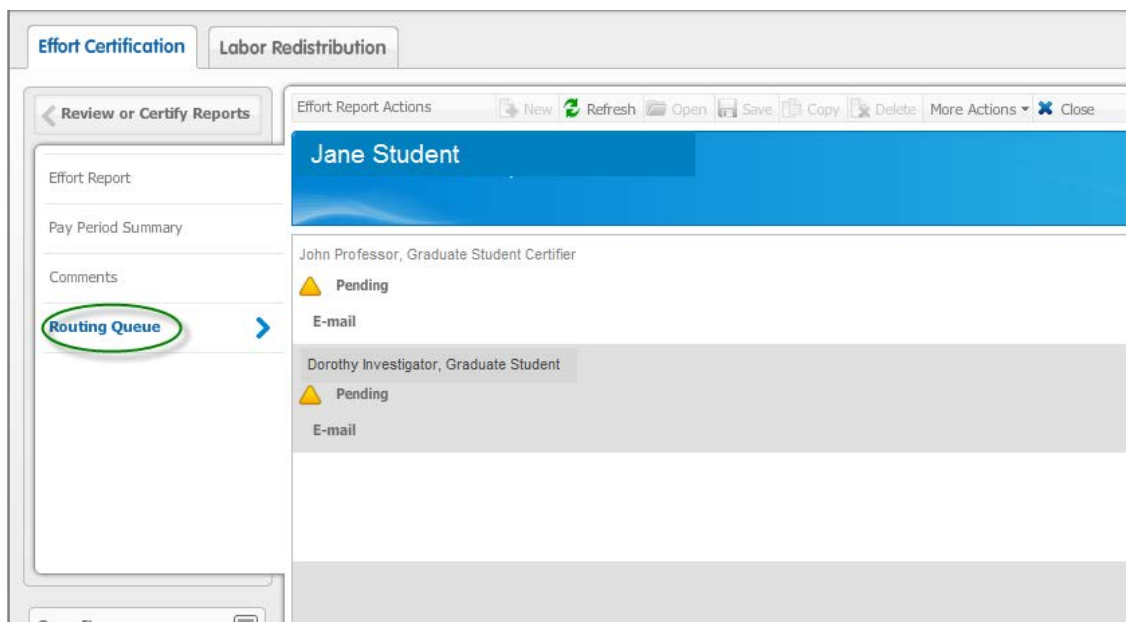


**Step 12**

**SIGN OUT**

Once all of the reports are completed, you are finished. Please Sign Out.  Thank you for your prompt attention.  If you have any questions, please do not hesitate to call:

Heather Bilotta, Sponsored Research Accounting Manager, hbilotta@wpi.edu or Yvonne Harris, Information Analyst, ydharris@wpi.edu