



UNIVERSITY of  
**SOUTH FLORIDA**  
Research & Innovation

# **Personnel Effort Reporting Tool (PERT)**

## **Guidebook for USF PERT Department Representatives**

# Table of Contents

|                                                                                     |                |
|-------------------------------------------------------------------------------------|----------------|
| <b>Links and Sponsored Research Post Award Contacts</b>                             | <b>Page 1</b>  |
| <b>PERT Overview, Roles, Certifiers</b>                                             | <b>Page 2</b>  |
| <b>Cost Sharing and PERT Report Generation</b>                                      | <b>Page 3</b>  |
| <b>PERT Schedule and Requirements</b>                                               | <b>Page 6</b>  |
| <b>PERT System Access and Navigation</b>                                            | <b>Page 7</b>  |
| <b>Retrieve &amp; Review Effort Reporting Data</b><br>Steps 1 - 12 with screenshots | <b>Page 9</b>  |
| <b>Changing Employee Level Effort Report Detail</b><br>Steps 1 – 6 with screenshots | <b>Page 19</b> |
| <b>Correcting Rejected Employee Effort Data</b><br>Steps 1 – 8 with screenshots     | <b>Page 22</b> |

## **Links**

PERT Website: <https://www.usf.edu/research-innovation/research-support/sponsored-research/pert/index.aspx>

The PERT Website contains the following important resources:

- [General Info](#)
- [PERT Schedule PDF](#)
- [PERT Training](#)
- [NIH Salary Cap Information \(PDF\)](#)
- [NIH Calculation Worksheet \(Excel\)](#)
- [Pay Distribution Worksheet \(Excel\)](#)
- [Effort Review Checklist \(PDF\)](#)
- [Sample Communication \(PDF\)](#)
- [Reminder Template \(MS Word\)](#)
- [Sample Exit Email \(MS Word\)](#)

Other Resources

- [GEMS Distribution Form](#)
- [USF System Policy 0-313, Sponsored Research Cost Sharing](#)
- [FAST Security Access Request](#)

## **Sponsored Research Post Award PERT Contacts**

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- Julia Dunn, Grant Financial Administrator  
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## PERT Overview

PERT is the University's federal effort and committed cost share reporting system. Compliance with federally established Office of Management and Budget, Federal awards issued prior to December 26, 2014 are required to be managed in accordance with OMB Circulars A-21, A-110, and A-133. Federal awards issued on or after December 26, 2014 are to be managed in accordance with 2 CFR Part 200: Uniform Administrative Requirements, Cost Principles, and Audit Requirements for federal Awards (The Uniform Guidance) or the appropriate regulations applicable to the award as specified in the Notice of Award issued by the funding agency.

Uniform Guidance requires educational institutions to maintain an accurate system for reporting the percentage of time that employees devote to federally funded projects (Effort). Effort is the work or proportion of time spent on any activity and expressed as a percentage of total time. Total effort of 100% must be reported. Percent of effort does not reflect number of hours. Committed Cost Share is any project cost not borne by the sponsor (regardless of funding source) and committed by USF for the performance of an externally funded project. Such commitments must be explicitly stated in the project budget, described in the proposal narrative, or included within the sponsor's guidelines as a commitment.

## PERT Roles

- Effort Central (PERT Central) – Sponsored Research Post Award Compliance staff responsible for generating and releasing PERT reports to the departments and coordinating university effort reporting after each semester.
- Department Representatives - responsible for reviewing and correcting each effort report prior to certification and ensuring that any changes/corrections are updated in FAST (requires a retroactive pay distribution, a.k.a. RET submission for each change/correction).
- Certifiers – responsible for reviewing the effort report, notifying the Department Representative of any necessary corrections or adjustments, ensuring that all effort corrections or adjustments are made prior to certifying and certifying the report.

## PERT Certifiers

Faculty (salary plan 22), Administration (salary plan 21) and Staff (salary plan 23) employees paid from federal funds or anyone providing cost share to a project. The federal government expects all effort reports to be completed by individuals with **first-hand knowledge** of all aspects of the work performed. The employee performing or supervising the work is in the best position to provide this information.

If this individual is no longer employed by the University the individual's supervisor, PI or Co-PI are responsible for certifying the effort report on his/her behalf. For Temporary (OPS) employees, the nature of their responsibilities may not provide sufficient information to distinguish one research project from another. In order to assure proper reporting, supervisors, PIs or Co-PIs of temporary employees are responsible for certifying the temporary employee's effort.

*Note: PERT recognizes allowable certifiers. For each report, only the non-OPS employee for whom the report was generated, the project PI/Co-PI, the Department Head or Chairperson or the employee's supervisor can certify. The PI/Co-PI listed is the PI/Co-PI common to all projects in the report. If there is not a PI/Co-PI in common to every project listed on the report, the system will not recognize a PI/Co-PI certifier and the effort would then need to be certified by the supervisor. The allowable certifiers listed for each PERT report are updated via a nightly process to reflect changes in Supervisor/Reports To and/or the common PI/Co-PI (due to project changes).*

## Cost Sharing

There are four types of Cost Sharing:

- **Mandatory (Committed)** - required by the program as a condition of the award and therefore is obligatory and reportable.
- **Salary Cap Cost Sharing (Committed)** - occurs when the salary for an individual exceeds the sponsor imposed limit. This is classified as Voluntary Committed cost share and must be documented within USF's system and may require reporting to the agency.
- **Voluntary (Committed)** – offered/proposed by the grantee when not specifically required by the sponsor. The offer is included in the award directly or by reference. Voluntary Committed cost sharing expenses must be properly identified for cost accounting purposes. **Voluntary cost sharing is highly discouraged and requires approval Sponsored Research approval.**

*Note: Once proposed voluntary cost share is accepted by the sponsor, it is considered a required University commitment toward the awarded project. PERT reports Committed Cost Share only.*

- **Voluntary (Uncommitted)** - unplanned cost share that does not need to be documented within the University's system or reported to the sponsors.

All employees providing cost share will need to have their pay distributed to the appropriate cost share FAST combination code to be reflected in PERT (includes salary cap cost share). The FAST combination codes are generated using the cost share chartfield information provided on the Grant Budget Release form.

The Department Representative is responsible for ensuring that payroll is distributed to the appropriate FAST combination code for cost share to the project and verifying that the information has been accurately recorded in PERT.

## Cost Sharing

Non-Project to Project Cost Share - USF unrestricted fund (RIA and E&G funds) shares in the cost of the sponsored project.

Example:

| Proj/Grt     | Cost Share A/C Desc     | FAST Descr                     | Payroll% Effort% | Combination Code | Oper Unit | GL Acct | GL Deptid | Fund  | Product |
|--------------|-------------------------|--------------------------------|------------------|------------------|-----------|---------|-----------|-------|---------|
| 1            |                         | DEPT OF LAW & MENTAL HLTH      | 59               | 59 000029808     | TPA       | 50022   | 582000    | 10000 | 000000  |
| 2 5820105000 |                         | A Retrospective Analysis of Pu | 6                | 6 000078636      | TPA       | 50022   | 582000    | 22000 | 000000  |
| 3 5820107600 | COSTSHARE<br>5820107600 | Evaluation of AHCA             | 35               | 35 000114157     | TPA       | 50022   | 582000    | 10000 | 000000  |

**Total Payroll%: 100 Effort%: 100**

Of the total time worked during the reporting period, the employee's time was spent on the following (listed by line #):

1. 59% non-project related effort
2. 6% effort on Project 582010500
3. 35% effort committed to Project 5820107600, paid by state funds (Fund 10000)

Project to Project Cost Share - A non-federal sponsored project shares in the cost of another sponsored project.

Example:

| ProjGrt                | Cost Share A/C Desc          | FAST Descr                     | Payroll% Effort% | Combination Code | Oper Unit | GL Acct    | GL Deptid | Fund  | Product |
|------------------------|------------------------------|--------------------------------|------------------|------------------|-----------|------------|-----------|-------|---------|
| 1 5830112800           |                              | University of South florida Ce | 95               | 95 000082726     | TPA       | 50021      | 583002    | 20000 | 000000  |
| 2 5830111200           | COSTSHARE PROJECT TO PROJECT | Center for Autism and Related  | 1                | 1 000094542      | TPA       | 50021      | 583002    | 21000 | PRJPRJ  |
| 3 5830116404           | COSTSHARE - 5830112800       | CARD to UCEDD C/S              | 4                | 4 000116576      | TPA       | 50021      | 583002    | 21000 | PRJPRJ  |
| <b>Total Payroll%:</b> |                              |                                | <b>100</b>       | <b>Effort%:</b>  |           | <b>100</b> |           |       |         |

This example reports two separate instances of project-to-project committed cost share. Of the total time worked during the reporting period, the employee's time was spent on the following (listed by line #):

1. 95% effort on Project 5830112800
2. 1% effort committed to an unidentified project (paid by Project 5830111200)
3. 4% effort committed to Project 5830112800 (paid by Project 5830116404)

### **PERT Report Generation**

Effort reports are generated for all employees who have salary distributed from a federally-funded project, or distributed as cost sharing through FAST pay distribution. Effort is reported at the employee record (Empl Rcd) level. The associated salary amounts are based on the Institutional Base Salary (IBS), which includes the following earning codes in FAST:

REG - Regular  
 OVT - Overtime Earnings  
 PPH - Prior Pay Period Hours  
 RTA - Retro Earnings Adjust  
 SAH - Salaried Ees Additional Hrs  
 DOC - Dock Earnings

Earnings are prorated to align with semester dates, which seldom coincide with the biweekly pay schedule. Therefore, PERT prorates the effort within the first and last pay periods of the effort reporting period (semester boundaries).

### Prorating Logic Chart

|                                         | Boundary Pay Period of PERT Report                              |                                   |         |                                                                                                                                                            |                                   | Boundary Pay Period of PERT Report                                   |                                      |         |                                                                                                                                                                |
|-----------------------------------------|-----------------------------------------------------------------|-----------------------------------|---------|------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------|----------------------------------------------------------------------|--------------------------------------|---------|----------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Second to last pay period in prior term | Last pay period in prior term, First pay period in current term | Second pay period in current term | Action  | Logic                                                                                                                                                      | Second to last pay period in term | Last pay period in current term, first pay period in subsequent term | Second pay period in subsequent term | Action  | Logic                                                                                                                                                          |
| No Fed\$                                | Fed \$                                                          | Fed\$                             | INCLUDE | Generate current term report and include boundary pay period @100%                                                                                         | No Fed\$                          | Fed \$                                                               | Fed\$                                | EXCLUDE | No report generated for current term unless fed\$ in prior pay periods                                                                                         |
| Fed \$                                  | Fed \$                                                          | No Fed \$                         | EXCLUDE | generated for current term unless fed\$ in subsequent pay periods                                                                                          | Fed \$                            | Fed \$                                                               | No Fed \$                            | INCLUDE | Generate current term report and include boundary pay period @100%                                                                                             |
| Fed \$                                  | Fed \$                                                          | Fed \$                            | PRORATE | Generate current term report and prorate boundary pay period                                                                                               | Fed \$                            | Fed \$                                                               | Fed \$                               | PRORATE | Generate current term report and prorate boundary pay period                                                                                                   |
| No Fed\$                                | Fed\$                                                           | No Fed\$                          | PRORATE | System cannot determine which term the pay belongs to and prorates boundary pay period. This will also cause a report to be generated for the current term | No Fed\$                          | Fed\$                                                                | No Fed\$                             | PRORATE | System cannot determine which term the pay belongs to and prorates the boundary pay period. This will also cause a report to be generated for the current term |

## **PERT Schedule**

PERT reports are generated after each semester (3 times per year). Each certification period is approximately 5 weeks. Reports are locked when generated, released to the DRs for review and the released to the certifiers.

PERT Central posts the schedule annually. The deadlines are communicated to the departments when effort reports are released for review and certification. The certification deadline is also displayed on each

PERT report. Strict adherence to these deadlines is critical in meeting federal compliance requirements for timely reporting.

Within the PERT system, there is a function to expire effort reports. During closeout of a PERT period, all uncertified reports will be expired. Upon expiration of effort reports, Sponsored Research Post Award will take steps to ensure all federal dollars are removed from payroll for that PERT period.

## **Miscellaneous PERT Information and Requirements**

### **Sweeps**

In accordance with the PERT Schedule, a process referred to as “PERT Sweeps” is run after each certification period to identify discrepancies between certified effort and FAST pay history. Once the differences are identified, PERT Central notifies the Department Representatives and requests RETs be submitted to move excess salary charges on projects (salary % > effort %) to unrestricted accounts. Likewise, any understated cost share (salary % < effort %) would also need to be corrected.

### **Out of Cycle Generations**

When salary charges are not distributed in accordance with the effort, retroactive expenditure transfers (RETS) should be prepared and submitted to Sponsored Research Post Award to correct the pay distribution. This should occur immediately upon discovering the distribution error(s). RETs posted in the FAST prior to the end of the certification period, will be reflected in the effort reports. A weekly process is run to generate any new effort reports that may be required due to RETs.

### **Recertification Requests**

In the rare, infrequent and unfortunate event that a certifier certifies an incorrect report, a recertification request may be submitted to the department’s Compliance Grant Financial Administrator (GFA). Not all recertification requests are approved. The Assistant Director of Sponsored Research Post Award determines approval based on the nature of the request and its justifying documentation. If approved, the report will be opened for recertification. A two week certification deadline is applied for recertification requests.

### **PERT & FAR Matching**

As PERT reports federal effort and/or cost share (regardless of funding source), Faculty Activity Reporting (FAR) is managed through the Faculty Academic Information Reporting (FAIR) system. FAR reports the effort of instructional personnel expended in support of their assignment. Though PERT and FAR are used for very different purposes, both document faculty activity. It is critical (to avoid risk to the university) that the reports for all employees in both systems report the same level of sponsored activity. Any differences must be substantiated.

## **PERT System Access**

PERT is certified via FAST. All active employees have access to FAST. Each employee's access to Self Service is setup with a User ID and a default password.

- Your Self Service User ID is your 11 digit FAST Employee ID (EmplID), an auto-generated numeric ID assigned by the system. Example of Self Service User ID: 00000012345
- Your default password is the last four digits of your Social Security number, an = sign, and the four digit year of birth. Example of Default Password: 3422=1957

As a PERT Department Representative - FAST access is required. FAST access allows users to view information for all personnel in FAST. Each user's view is limited to the information that his or her job/role requires.

The Request for FAST Access form is used to request access to FAST data. The form is completed and approved by the appropriate department level designees and forwarded it to IT. For PERT Department Representative access check the Effort Representative box.

## **PERT System Navigation**

### **Certifier's Navigation:**

As a Department Representative (DR) it is important that you learn the Certifiers Navigation and how to certify effort reports. The online PERT Certifier training provides both a certification/navigation demonstration and simulation. Research Clarification or Change in Procedure (CCHIP) #0004, Mandatory Training for Effort Reporting prescribes PERT training as mandatory .

PERT is certified via FAST. Effort Report System > Certify

The screenshot shows the 'Effort Certification' search page. At the top, a breadcrumb trail reads: Favorites > Main Menu > Effort Report System > Certify > Effort Certification. Below the title 'Effort Certification', there is a instruction: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' A button labeled 'Find an Existing Value' is present. A section titled 'Search Criteria' contains several search fields, each with a dropdown menu and a search icon:

- Empl ID: begins with [ ]
- Empl Record: = [ ]
- Report Begin Date: = [ ]
- Report End Date: = [ ]
- Plan: begins with [ ]
- Fiscal Year: = [ ]
- Effort Certification: begins with [ ]
- Reject: begins with [ ]
- Dept Admin Change: begins with [ ]
- Emp Changed: begins with [ ]

At the bottom of the search criteria section, there are four buttons: 'Search', 'Clear', 'Basic Search' (with a magnifying glass icon), and 'Save Search Criteria'.

### Certify

Effort Certification – provides certification access to the non-OPS employee for whom the report was generated. Only the employee, project PI/Co-PI, the Department Head or Chairperson or the employee’s supervisor can certify.

PI/Co-PI Certification for OPS – lists and provides PI/Co-PI certification access to all reports generated for OPS employees that provided effort on their projects.

FAST Project Information – displays the project name (Descr), start and end dates, sponsor and PI information.

## Department Representative's Navigation

### Retrieve and Review Effort Reporting Data

Following the creation of effort reports, Department Representatives (DR) will be notified by Sponsored Research Post Award Compliance, that the effort reports are ready for review. During this review period, Department Representatives will be able to make adjustments to the uncertified effort reports. Missing accounts should be added, payroll percentages checked, and any changes from proposed committed cost sharing should be updated. Once adjustments are complete, the DR should unlock the reports and notify their faculty and other certifiers that the reports are ready to be reviewed and if correct, certified.

Step 1:                Navigate to **Admin Effort Review**

The screenshot shows the navigation path: **Effort Report System > Use > Admin Effort Review**. A dropdown menu is open under 'Use', showing options: Setup, Use (highlighted), Process, and Certify. The 'Admin Effort Review' option is circled in red.

**Admin Effort Review**  
Enter any information you have and click S

[Find an Existing Value](#) [Add a New](#)

▼ **Search Criteria**

Name begins with [ ]

Empl ID begins with [ ] 🔍

Empl Record = [ ] 🔍

Fiscal Year = [ ]

Report Begin Date = [ ] 🔍

Report End Date = [ ] 🔍

Salary Administration Plan begins with [ ] 🔍

Department begins with [ ]

Effort Certification begins with [ ]

Emp Changed begins with [ ]

Dept Admin Change begins with [ ]

Reject begins with [ ]

Locked for Review = [ ]

Include History    Case Sensitive

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

Step 2: Using any combination of search options, enter the criteria, click **Include History** and click the **Search** button.

In the example below the following options were used:

- **Department** (FAST Dept ID format: X-XXXX-XXX)
- **Effort Certification** (N to view non-certified reports)

**Admin Effort Review**  
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value | Add a New Value

|                             |             |                                         |                      |                      |                      |
|-----------------------------|-------------|-----------------------------------------|----------------------|----------------------|----------------------|
| Name:                       | begins with | <input type="text"/>                    |                      |                      |                      |
| EmpID:                      | begins with | <input type="text"/>                    | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| Empl Rcd Nbr:               | =           | <input type="text"/>                    | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| Fiscal Year:                | =           | <input type="text"/>                    | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| Report Begin Date:          | =           | <input type="text"/>                    | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| Report End Date:            | =           | <input type="text"/>                    | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| Salary Administration Plan: | begins with | <input type="text"/>                    | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| Department:                 | begins with | <input type="text" value="0-5830-005"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| Effort Certification:       | begins with | <input type="text" value="N"/>          | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| Emp Changed:                | begins with | <input type="text"/>                    | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| Dept Admin Change:          | begins with | <input type="text"/>                    | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| Reject:                     | begins with | <input type="text"/>                    | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| Locked for Review:          | =           | <input type="text"/>                    | <input type="text"/> | <input type="text"/> | <input type="text"/> |

Include History    Case Sensitive

     [Basic Search](#)   [Save Search Criteria](#)

[Find an Existing Value](#) | [Add a New Value](#)

*Note: When returning to the search page for another, click Clear to remove all unwanted search values.*

Step 3: From the search results, click the link for report to be viewed.

**Admin Effort Review**  
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value    Add a New Value

Name: begins with [ ]

EmplID: begins with [ ]

Empl Rcd Nbr: = [ ]

Fiscal Year: = [ ]

Report Begin Date: = [ ]

Report End Date: = [ ]

Salary Administration Plan: begins with [ ]

Department: begins with [ 0-5830-005 ]

Effort Certification: begins with [ N ]

Emp Changed: begins with [ N ]

Dept Admin Change: begins with [ N ]

Reject: begins with [ N ]

Locked for Review: = [ ]

Include History     Case Sensitive

Search    Clear    Basic Search    Save Search Criteria

**Search Results**  
View 100    Page 1 of 10    1-15 of 10

| Name                      | EmplID        | Empl Rcd Nbr | Fiscal Year | Report Begin Date | Report End Date | Salary Administration Plan | Department | Effort Certification | Emp Changed | Dept Admin Change | Reject | Locked for Review |
|---------------------------|---------------|--------------|-------------|-------------------|-----------------|----------------------------|------------|----------------------|-------------|-------------------|--------|-------------------|
| Barnes,Rodnick Terrel     | 00000017628 0 |              | 2007        | 08/07/2006        | 12/19/2006      | 21                         | 0-5830-005 | N                    | N           | N                 | N      | DR Locked         |
| Barrera,Alicia Elizabeth  | 00000063242 0 |              | 2007        | 08/07/2006        | 12/19/2006      | 09                         | 0-5830-005 | N                    | N           | N                 | N      | DR Locked         |
| Botel,Eloise L            | 00000014788 0 |              | 2007        | 08/07/2006        | 12/19/2006      | 23                         | 0-5830-005 | N                    | N           | N                 | N      | DR Locked         |
| Davis,Electa D            | 00000045827 0 |              | 2007        | 08/07/2006        | 12/19/2006      | 21                         | 0-5830-005 | N                    | N           | N                 | N      | DR Locked         |
| Espinosa,Ivan Rafael      | 00000063248 0 |              | 2007        | 08/07/2006        | 12/19/2006      | 09                         | 0-5830-005 | N                    | N           | N                 | N      | DR Locked         |
| Friedman,Amelia Jan       | 00000063244 0 |              | 2007        | 08/07/2006        | 12/19/2006      | 09                         | 0-5830-005 | N                    | N           | N                 | N      | DR Locked         |
| Gonzalez,Mercedes         | 00000063724 0 |              | 2007        | 08/07/2006        | 12/19/2006      | 00                         | 0-5830-005 | N                    | N           | N                 | N      | DR Locked         |
| Joseph,David E            | 00000017413 0 |              | 2007        | 08/07/2006        | 12/19/2006      | 09                         | 0-5830-005 | N                    | N           | N                 | N      | DR Locked         |
| Joseph,Rubra A            | 00000023913 0 |              | 2007        | 08/07/2006        | 12/19/2006      | 22                         | 0-5830-005 | N                    | N           | N                 | N      | DR Locked         |
| Marchak,Steven            | 00000056459 0 |              | 2007        | 08/07/2006        | 12/19/2006      | 21                         | 0-5830-005 | N                    | N           | N                 | N      | DR Locked         |
| Pagan,Leslie Ann          | 00000050927 1 |              | 2007        | 08/07/2006        | 12/19/2006      | 21                         | 0-5830-005 | N                    | N           | N                 | N      | DR Locked         |
| Sanova,Joko M             | 00000013263 0 |              | 2007        | 08/07/2006        | 12/19/2006      | 22                         | 0-5830-005 | N                    | N           | N                 | N      | DR Locked         |
| Vitek,Kristina M          | 00000051059 0 |              | 2007        | 08/07/2006        | 12/19/2006      | 09                         | 0-5830-005 | N                    | N           | N                 | N      | DR Locked         |
| Watkins,Evelinda Iveth    | 00000025916 6 |              | 2007        | 08/07/2006        | 12/19/2006      | 00                         | 0-5830-005 | N                    | N           | N                 | N      | DR Locked         |
| Wooden,Tachonta Swannette | 00000063247 0 |              | 2007        | 08/07/2006        | 12/19/2006      | 09                         | 0-5830-005 | N                    | N           | N                 | N      | DR Locked         |
| Yamolskaya,Svetlana       | 00000022762 0 |              | 2007        | 08/07/2006        | 12/19/2006      | 22                         | 0-5830-005 | N                    | N           | N                 | N      | DR Locked         |

Search Results Include:

- Number of results found
- Employee's information: Name, EmplID and Empl Rcd Nbr
- Fiscal Year (report was generated)
- Report Begin and End Date
- Salary Administration Plan (0\_ = OPS; 21 = Administration; 22 = Faculty; 23 = Staff)
- Department
- Effort Certification (N - No, Y-Yes or E-Expired)
- Emp Changed (N to view effort not changed by the employee)
- Dept Admin Change (N - No, Y-Yes)
- Reject (N - No, Y-Yes)
- Locked for Review (Locked, Locked for DR Review, Unlocked)

*Note: If multiple results are found matching the search criteria, a Search Results listing will appear at the bottom of the screen. Multiple rows may appear for each employee, representing multiple jobs (Empl Rcds) or multiple Effort Reports, each representing a different reporting period.*

Step 4: The Effort Report Details page appears. The section header (top blue bar) displays the number of rows associated with the reported effort. Rows are added for each change that is made to the report. History is maintained by effective date (Eff Date) for each update/correction made to an employee's effort detail. Row 1 is always the most up-to-date record. If the record has 3 rows of employee level detail, **3 of 3** is the original and **1 of 3** contains the most up-to-date detailed information.

The screenshot displays the 'Effort Report Detail' page for Employee Level. The top navigation bar includes 'Effort Report Detail', 'Effort Comments', 'Post Certification Comments', and 'Allowable Certifiers'. The main content area shows employee details for Joseph, Ruby A. (EmpID: 00000023913, Sal Plan: 22) with an effective date of 02/27/2007 and a report period from 08/07/2006 to 12/19/2006. Below this is an 'Account Details' table with one row of data. At the bottom, there are buttons for 'Save', 'Return to Search', 'Previous in List', 'Next in List', 'Notify', 'Update/Display', and 'Include History' (which is circled in red).

| Proj/Grt     | 'Combo Code | FAST Descr           | Payroll% | Cost Share% | Effort% | Oper Unit | FAST Dept | Fund  | Prod   | Chartfield1 | SRN Number |
|--------------|-------------|----------------------|----------|-------------|---------|-----------|-----------|-------|--------|-------------|------------|
| 1 5830047400 | 000032238   | GEAR UP 2 (Memorial) | 100      |             | 100     | TPA       | 583005    | 20000 | 000000 | 0000000     | 5830474k0  |

Note: **Include History** view must be used to view multiple rows of Employee Level effort detail.

The page reflects the following **Employee Level** effort detail.

- Employee information: **Name, EmplID, Empl Rcd#, Name** and **Sal Plan**
- **Effective Date** (the date the record/report was created or last updated)
- **Report Period** (begin and end Date)
- **Due Date** (effort reporting period deadline date)

**View Current Payroll History** - button links to a **current live view** of the FAST payroll history.

- **Emp Chgd** (N to view effort not changed by the employee)
- **Certify** (N - No, Y-Yes or E-Expired)
- **Reject** (N - No, Y-Yes)
- **User ID** (if the report has been adjusted, displays the adjusted by FAST User ID)
- **Lock Status** (Locked, Locked for DR Review, Unlocked)

**EMAIL** - used to e-mail information directly from PERT to employee listed on the effort report.

*Note: Include History view must be used to view multiple rows of Employee Level effort detail. If employee's e-mail address is not listed in FAST an error message will appear. This function is not available for OPS employees since they do not certify their own effort.*

The Account Details section displays the FAST Combo Code and its associated chartfield values for each line of pay distribution. To view as shown in Step 3, click the Show all Columns button.

| Proj/Grt     | Combo Code | FAST Descr           | Payroll% | Cost Share% | Effort% | Oper Unit | FAST Dept | Fund  | Prod   | Chartfield1 SRN Number |
|--------------|------------|----------------------|----------|-------------|---------|-----------|-----------|-------|--------|------------------------|
| 1 5830047400 | 000032238  | GEAR UP 2 (Memorial) | 100      |             | 100     | TPA       | 583005    | 20000 | 000000 | 0000000 5830474K0      |

**Effort Data:**

- Proj/Grt
- Combo Code
- FAST Descr (Description)
- Payroll%
- Cost Share% (if prior to 2007)
- Effort%

**Additional Info:**

- Oper Unit
- FAST Dept
- Fund
- Prod
- Chartfield1 (Initiative)
- SRN Number (State Reporting Number)

Effort is determined and calculated from the percentage of salary dollars charged to projects and/or project cost shares.

DA Comments are used to view/add comment stored under the Effort Comments tab. Comments should be entered for each change made to an effort report to provide an audit trail. Users of the system are encouraged to include comments in effort reports to support exceptional circumstances and actions taken.

Step 5: To confirm that the Account Details section reflects the current payroll history, including posted retroactive expenditure transfers, RETs), click the **View Current Payroll History** button.

**Effort Report Detail** | Effort Comments | Post Certification Comments | Allowable Certifiers

**Employee Level**

EmpID: 0000023913 | EmpI Rcd#: 0 | Name: Joseph,Ruby A | Sal Plac: 22

Eff Date: 03/27/2007 | Report Period: 08/07/2006 -- 12/19/2006 | Due: 03/30/2007

Emp Chgd: N | Certify: N | Reject: N | **View Current Payroll History**

User ID: | Lock Status: Locked for DR Review | EMAIL

**Account Details**

| Proj/Grt     | Combo Code | FAST Descr           | Payroll% | Cost Share% | Effort% | Oper Unit | FAST Dept | Fund  | Prod   | Chartfield1 SRN Number |
|--------------|------------|----------------------|----------|-------------|---------|-----------|-----------|-------|--------|------------------------|
| 1 5830047400 | 000032238  | GEAR UP 2 (Memorial) | 100      |             | 100     | TPA       | 583005    | 20000 | 000000 | 0000000 5830474K0      |

FTE: 1.00000 | Totals for Payroll%: 100 | Effort%: 100

DA Comments: PERT Comment: Pay ending 10-AUG-2006 was included at 40 percent. Pay ending 28-DEC-2006 was included at 30 percent.

Save | Return to Search | Previous in List | Next in List | Notify | Update Display | Include History

Effort Report Detail | Effort Comments | Post Certification Comments | Allowable Certifiers

Step 6: The Payroll History View provides a live (current) view of all posted salary details. The PERT Earnings Sub-Total section should mirror the PERT Account Details section. Click the **Return to Admin Effort Review** once pay history is confirmed.

The screenshot displays the 'Payroll History View' for employee Joseph, Ruby A. It includes a table of payroll transactions and a summary of PERT earnings. A red circle highlights the 'Download' button in the top right of the payroll details table, and a red arrow points to the 'Return to Admin Effort Review' link at the bottom of the page.

| Pay End Dt    | Pay Period | % of PP in Term | GEMS Acct Code | Project ID | RET Status | Ret Seq# | Trans Date | Earn Code | Gross Earnings | Amount Prorated | PP Included? | Eligible Emcd? | Earnings Used |
|---------------|------------|-----------------|----------------|------------|------------|----------|------------|-----------|----------------|-----------------|--------------|----------------|---------------|
| 1 08/16/2006  | 0703       | 40.00           | 000032238      | 5830047400 | 0          | 0        | 08/16/2006 | REG       | \$2700.46      | \$1080.18       | PRORATE      | Y              | \$1080.18     |
| 2 08/24/2006  | 0704       | 100.00          | 000032238      | 5830047400 | 0          | 0        | 09/01/2006 | REG       | \$2700.46      | \$2700.46       | INCLUDE      | Y              | \$2700.46     |
| 3 09/07/2006  | 0705       | 100.00          | 000032238      | 5830047400 | 0          | 0        | 09/15/2006 | REG       | \$2700.46      | \$2700.46       | INCLUDE      | Y              | \$2700.46     |
| 4 09/21/2006  | 0706       | 100.00          | 000032238      | 5830047400 | 0          | 0        | 09/29/2006 | REG       | \$2700.46      | \$2700.46       | INCLUDE      | Y              | \$2700.46     |
| 5 10/05/2006  | 0707       | 100.00          | 000032238      | 5830047400 | 0          | 0        | 10/13/2006 | REG       | \$2732.86      | \$2732.86       | INCLUDE      | Y              | \$2732.86     |
| 6 10/19/2006  | 0708       | 100.00          | 000032238      | 5830047400 | 0          | 0        | 10/27/2006 | REG       | \$2781.46      | \$2781.46       | INCLUDE      | Y              | \$2781.46     |
| 7 11/02/2006  | 0709       | 100.00          | 000032238      | 5830047400 | 0          | 0        | 11/09/2006 | REG       | \$2781.46      | \$2781.46       | INCLUDE      | Y              | \$2781.46     |
| 8 11/16/2006  | 0710       | 100.00          | 000032238      | 5830047400 | 0          | 0        | 11/22/2006 | REG       | \$2781.46      | \$2781.46       | INCLUDE      | Y              | \$2781.46     |
| 9 11/30/2006  | 0711       | 100.00          | 000032238      | 5830047400 | 0          | 0        | 12/08/2006 | REG       | \$2781.46      | \$2781.46       | INCLUDE      | Y              | \$2781.46     |
| 10 12/14/2006 | 0712       | 100.00          | 000032238      | 5830047400 | 0          | 0        | 12/21/2006 | REG       | \$2781.46      | \$2781.46       | INCLUDE      | Y              | \$2781.46     |
| 11 12/28/2006 | 0713       | 30.00           | 000032238      | 5830047400 | 0          | 0        | 01/05/2007 | REG       | \$2781.46      | \$834.44        | PRORATE      | Y              | \$834.44      |

| GEMS Acct Code | Project ID | SPN       | Fund Code | Total Payroll Used | Percent | Distrib FTE |
|----------------|------------|-----------|-----------|--------------------|---------|-------------|
| 1 000032238    | 5830047400 | 583047400 | 20000     | \$26656.16         | 100     | 1.00        |

PERT Eligible Grand Total: \$26656.16

FAST PICPI Information

| Project ID   | Role | Empid       | Name           |
|--------------|------|-------------|----------------|
| 1 5830047400 | PI   | 00000023913 | Joseph, Ruby A |

[Return to Admin Effort Review](#)

Notify

Note: The Payroll and PERT Pay Details section data can be used as a data source for the Pay Distribution Worksheet (discussed later in this workshop). Use the **Download** button to send the data to Excel for easy entry to the Pay Distribution Worksheet.

If changes/ RETs are pending (not yet posted) the Effort Report should be adjusted (updated) to reflect the change(s) and an explanation should be entered in the comments section (See Changing Employee Level Effort Report Detail).

Step 7: The **Effort Comments** page displays any comments entered by the employee or DR.

Effort Report Detail | **Effort Comments** | Post Certification Comments | Allowable Certifiers

Employee Level Find | View All First 1 of 1 Last

EmplID: 00000023913 Empl Rcd#: 0 Name: Joseph,Ruby A FTE: 1.000000  
 Eff Date: 02/27/2007 User ID: Report Period: 08/07/2006 -- 12/19/2006

Employee Comment:

DA/DR Comments: PERT Comment: Pay ending 10-AUG-2006 was included at 40 percent. Pay ending 28-DEC-2006 was included at 30 percent.

Save Return to Search Previous in List Next in List Notify Update/Display Include History

[Effort Report Detail](#) | [Effort Comments](#) | [Post Certification Comments](#) | [Allowable Certifiers](#)

Step 8: The **Post Certification Comments** can only be entered by Sponsored Research Post Award Compliance.

Effort Report Detail | Effort Comments | **Post Certification Comments** | Allowable Certifiers

Employee Level Find | View All First 1 of 1 Last

EmplID: 00000023913 Empl Rcd#: 0 Name: Joseph,Ruby A FTE: 1.000000  
 Eff Date: 02/27/2007 Report Period: 08/07/2006 -- 12/19/2006

Comment User ID:

Post Certification Comments:

Save Return to Search Previous in List Next in List Notify Update/Display Include History

[Effort Report Detail](#) | [Effort Comments](#) | [Post Certification Comments](#) | [Allowable Certifiers](#)

Step 9: The **Allowable Certifiers** page lists all those currently eligible to certify the effort report.

Joseph, Ruby A      EmpID: 00000023913      Empl Rcd Nbr: 0

| CERTIFIED BY       | Certifier's ID | Name             |     |
|--------------------|----------------|------------------|-----|
| 1 SUPERVISOR       | 00000015106    | Hernandez, Mario | + - |
| 2 PI-CPI           | 00000023913    | Joseph, Ruby A   | + - |
| 3 PERT DEPT CHAIR  | 00000015106    | Hernandez, Mario | + - |
| 4 EMPLOYEE         | 00000023913    | Joseph, Ruby A   | + - |
| 5 DEPARTMENT CHAIR | 00000015106    | Hernandez, Mario | + - |

[Save](#)   [Return to Search](#)   [Previous in List](#)   [Next in List](#)   [Notify](#)   [Update/Display](#)   [Include History](#)

[Effort Report Detail](#) | [Effort Comments](#) | [Post Certification Comments](#) | [Allowable Certifiers](#)

*Note: Allowable Certifiers information is processed nightly. Any updates to job data (Supervisor and/or Reports To) are reflected the next business day.*

Step 10: If no adjustments are required, the DR should unlock the report and notify the faculty member or other certifiers that the report is ready to be reviewed and if correct, certified. To unlock the report, click the **Plus** sign located just below the Employee Level header to **Add a new row**.

The screenshot shows the 'Effort Report Detail' interface. At the top, there are tabs for 'Effort Report Detail', 'Effort Comments', 'Post Certification Comments', and 'Allowable Certifiers'. Below the tabs, the 'Employee Level' section displays the following information:

- EmpID: 00000023913, Empl Rcd#: 0, Name: Joseph, Ruby A, Sal Plan: 22
- Eff Date: 02/27/2007, Report Period: 08/07/2006 -- 12/19/2006, Due: 03/30/2007
- Emp Chgd: N, Certify: N, Reject: N
- User ID: [blank], Lock Status: Locked for DR Review

A circled plus sign is located to the right of the 'Sal Plan' field. Below the 'Employee Level' section is the 'Account Details' section, which includes a table with the following columns: Proj/Grt, Combo Code, FAST Descr, Payroll%, Cost Share%, Effort%, Oper Unit, FAST Dept, Fund, Prod, Chartfield1, and SRN Number. The table contains one row with the following values: 1, 5830047400, 000032238, GEAR UP 2 (Memorial), 100, [blank], 100, TPA, 583005, 20000, 000000, 0000000, and 5830474K0. Below the table, there are fields for FTE (1.000000), Totals for Payroll% (100), and Effort% (100). A 'DA Comments' field contains the text: 'PERT Comment: Pay ending 10-AUG-2006 was included at 40 percent. Pay ending 28-DEC-2006 was included at 30 percent.' At the bottom of the page, there are buttons for 'Save', 'Return to Search', 'Previous in List', 'Next in List', 'Notify', 'Update/Display', and 'Include History'.

Step 11: The row will now be displayed as row **1 of 2** and the Effective Date displayed is the current date. Change the **Lock Status** to **Unlocked** and then click the **Save** button.

The screenshot shows the 'Effort Report Detail' interface after the changes made in Step 10. The 'Employee Level' section now displays:

- EmpID: 00000023913, Empl Rcd#: 0, Name: Joseph, Ruby A, Sal Plan: 22
- Eff Date: 03/01/2007, Report Period: 08/07/2006 -- 12/19/2006, Due: 03/30/2007
- Emp Chgd: N, Certify: N, Reject: N
- User ID: RJONES, Lock Status: Un-locked

The 'Account Details' section is also visible, showing the same table as in Step 10. The 'DA Comments' field is now empty. At the bottom of the page, the 'Save' button is highlighted with a red arrow pointing to it from the text above. Another red arrow points from the text above to the 'Lock Status' field, which now shows 'Un-locked'.

Step 12: Notify the faculty member or other certifiers (for OPS) that the reports is ready to be reviewed and if correct, certified.

*Note: For non-OPS effort reports the Email button can be used to e-mail information directly from PERT to employee listed on the effort report. If employee's e-mail address is not listed in FAST an error message will appear.*

*The Notify feature should only be used from the Certify page. If used on the Admin Review page, the link that is sent in the email will link to the Admin Review page and the certifier would not be able to certify the report from that link.*

## Changing Employee Level Effort Report Detail

Step 1: Use Admin Effort Review to retrieve and update an employee's effort detail. **Add a new row** (click the Plus sign located just below the Employee Level header).

Effort Report Detail | Effort Comments | Post Certification Comments | Allowable Certifiers

Employee Level Find | View All First 1 of 1 Last

EmpID: 00000023913 Empl Rcd#: 0 Name: Joseph,Ruby A Sal Plan: 22

Eff Date: 02/27/2007 Report Period: 08/07/2006 -- 12/19/2006 Due: 03/30/2007

Emp Chgd: N Certify: N Reject: N View Current Payroll History

User ID: Lock Status: Locked for DR Review

EMAIL

Account Details Customize | Find First 1 of 1 Last

| Proj/Grt | Combo Code | FAST Descr | Payroll%             | Cost Share% | Effort% | Oper Unit | FAST Dept | Fund   | Prod  | Chartfield1 SRN Number |         |           |
|----------|------------|------------|----------------------|-------------|---------|-----------|-----------|--------|-------|------------------------|---------|-----------|
| 1        | 5830047400 | 000032238  | GEAR UP 2 (Memorial) | 100         |         | 100       | TPA       | 583005 | 20000 | 0000000                | 0000000 | 5830474K0 |

FTE: 1.000000 Totals for Payroll%: 100 Effort%: 100

DA Comments: PERT Comment: Pay ending 10-AUG-2006 was included at 40 percent Pay ending 28-DEC-2006 was included at 30 percent.

Save Return to Search Previous in List Next in List Notify Update/Display Include History

Effort Report Detail | Effort Comments | Post Certification Comments | Allowable Certifiers

Step 2: Notice the row is now displayed as row **1 of 2** and the Effective Date displayed is the current date.

Effort Report Detail | Effort Comments | Post Certification Comments | Allowable Certifiers

Employee Level Find | View All First 1 of 2 Last

EmpID: 00000023913 Empl Rcd#: 0 Name: Joseph,Ruby A Sal Plan: 22

Eff Date: 10/01/2007 Report Period: 08/07/2006 -- 12/19/2006 Due: 03/30/2007

Emp Chgd: N Certify: N Reject: N View Current Payroll History

User ID: RJONES Lock Status: Locked for DR Review

EMAIL

Account Details Customize | Find First 1 of 1 Last

| Proj/Grt | Combo Code | FAST Descr | Payroll%             | Cost Share% | Effort% | Oper Unit | FAST Dept | Fund   | Prod  | Chartfield1 SRN Number |         |           |
|----------|------------|------------|----------------------|-------------|---------|-----------|-----------|--------|-------|------------------------|---------|-----------|
| 1        | 5830047400 | 000032238  | GEAR UP 2 (Memorial) | 100         |         | 100       | TPA       | 583005 | 20000 | 0000000                | 0000000 | 5830474K0 |

FTE: 1.000000 Totals for Payroll%: 100 Effort%: 100

DA Comments:

Save Return to Search Previous in List Next in List Notify Update/Display Include History

Effort Report Detail | Effort Comments | Post Certification Comments | Allowable Certifiers

Step 3: Change the Account Details in **Row 1** to reflect the correct % Payroll/Effort. **Insert a new row** in the Account Details section.

The screenshot shows the 'Effort Report Detail' interface. The 'Account Details' section contains a table with the following data for Row 1:

| Proj/Git | Combo Code | FAST Descr | Payroll% | Cost Share% | Effort% | Oper Unit | FAST Dept | Fund  | Prod   | Chartfield1 | SRN Number |
|----------|------------|------------|----------|-------------|---------|-----------|-----------|-------|--------|-------------|------------|
| 1        | 5830047400 | 000032238  | 90       |             | 90      | TPA       | 583005    | 20000 | 000000 | 0000000     | 5830474K0  |

The 'Payroll%' and 'Effort%' columns for Row 1 are highlighted with a box. A plus sign button is circled in the bottom right corner of the table, indicating the action to insert a new row. Below the table, the 'Totals for Payroll%' is 90 and 'Effort%' is 90.

Step 4: Update **Row 2** to reflect the correct % Payroll/Effort on the correct FAST Combo Code.

The screenshot shows the 'Effort Report Detail' interface after a new row has been added. The 'Account Details' section contains a table with the following data for Row 2:

| Proj/Git | Combo Code | Cost Share A/C Descr | FAST Descr                      | Payroll% | Cost Share% | Effort% | Oper Unit | FAST Dept | Fund  | Prod   | Chartfield1 | SRN Number |
|----------|------------|----------------------|---------------------------------|----------|-------------|---------|-----------|-----------|-------|--------|-------------|------------|
| 1        | 5830047400 | 000032238            | GEAR UP 2 (Memorial)            | 90       |             | 90      | TPA       | 583005    | 20000 | 000000 | 0000000     | 5830474K0  |
| 2        | 5830117500 | 000117559            | GEAR UP #2 (GAINING EARLY Awar) | 10       |             | 10      | TPA       | 583005    | 21000 | PRJPRJ | 0000000     | 5830041P0  |

The 'Totals for Payroll%' is now 100 and 'Effort%' is 100. Row 2 is highlighted with a box.

*Note: The total of the values in the Payroll% and Effort% must always equal 100. If the Payroll/Effort % is changed in the effort report, a RET (Retroactive expenditure transfer) must be processed.*

Step 5: **Enter a comment** to reflect the reason the record was changed. Change the **Lock Status** to **Unlocked** and then click the **Save** button.

Effort Report Detail | Effort Comments | Post Certification Comments | Allowable Certifiers

Employee Level Find | View All | First 1 of 2 | Last

EmpID: 0000023913    Empl Rcd#: 0    Name: Joseph,Ruby A    Sal Plan: 22

Eff Date: 10/01/2007    Report Period: 08/07/2006 -- 12/19/2006    Due: 03/30/2007

Emp Chgd: N    Certify: N    Reject: N    [View Current Payroll History](#)

User ID: RJONES    Lock Status: **Unlocked**    [EMAIL](#)

Account Details Customize | Find | First 1 of 2 | Last

| ProjGt       | Combo Code | Cost Share A/C Descr             | FAST Descr            | Payroll% | Cost Share% | Effort% | Oper Unit | FAST Dept | Fund  | Pred   | Chartfield1 | SBN Number |
|--------------|------------|----------------------------------|-----------------------|----------|-------------|---------|-----------|-----------|-------|--------|-------------|------------|
| 1 5830047400 | 000032229  |                                  | GEAR UP 2 (Memorial)  | 90       |             | 90      | TPA       | 583005    | 20000 | 000000 | 0000000     | 5830474K0  |
| 2 5830117500 | 000117559  | GEAR UP #2 (GAINING EARLY AWARD) | GEAR UP 2 (2006-2007) | 10       |             | 10      | TPA       | 583005    | 21000 | PRJPRJ | 0000000     | 5830041P0  |

FTE: 1.000000    Totals for Payroll%: 100    Effort%: 100

DA Comments: Updated record to reflect 10% Cost Share (project to project) on Gear Up 2. Rets pending for PP 0703 - 0713.

[Save](#)    [Return to Search](#)    [Previous in List](#)    [Next in List](#)    [Notify](#)    [Update/Display](#)    [Include History](#)

Effort Report Detail | Effort Comments | Post Certification Comments | Allowable Certifiers

Step 6: Notify the faculty member or other certifiers (for OPS) that the report is ready to be reviewed and if correct, certified.

**Note:** Once changes are saved the [EMAIL](#) button can be used to notify the employee for certification review (non-OPS only).

The system generated email message will look similar to the example below:



*Note: Once changes are saved the Email button can be used to notify the employee for certification review (non-OPS only).*

## Correcting Rejected Employee Effort Report Data

Once the certifiers review the effort reports they may find errors that require assistance from the department representative to adjust. If so, they may reject the effort report. Once rejected, it will no longer be available to them to certify until adjusted and released again by the department representative.

Step 1: Use Admin Effort Review to retrieve and update an employee's effort detail. To search for Rejected reports within your department, enter the **Department** (FAST Dept ID) and enter a **Y** next to **Reject**. Click **Search**.

**Admin Effort Review**  
Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#) [Add a New Value](#)

Name: begins with [ ]

EmplID: begins with [ ]

Empl Rcd Nbr: = [ ]

Fiscal Year: = [ ]

Report Begin Date: = [ ]

Report End Date: = [ ]

Salary Administration Plan: begins with [ ]

**Department: begins with [ 0-2119-000 ]**

Effort Certification: begins with [ ]

Emp Changed: begins with [ ]

Dept Admin Change: begins with [ ]

**Reject: begins with [ Y ]**

Locked for Review: = [ ]

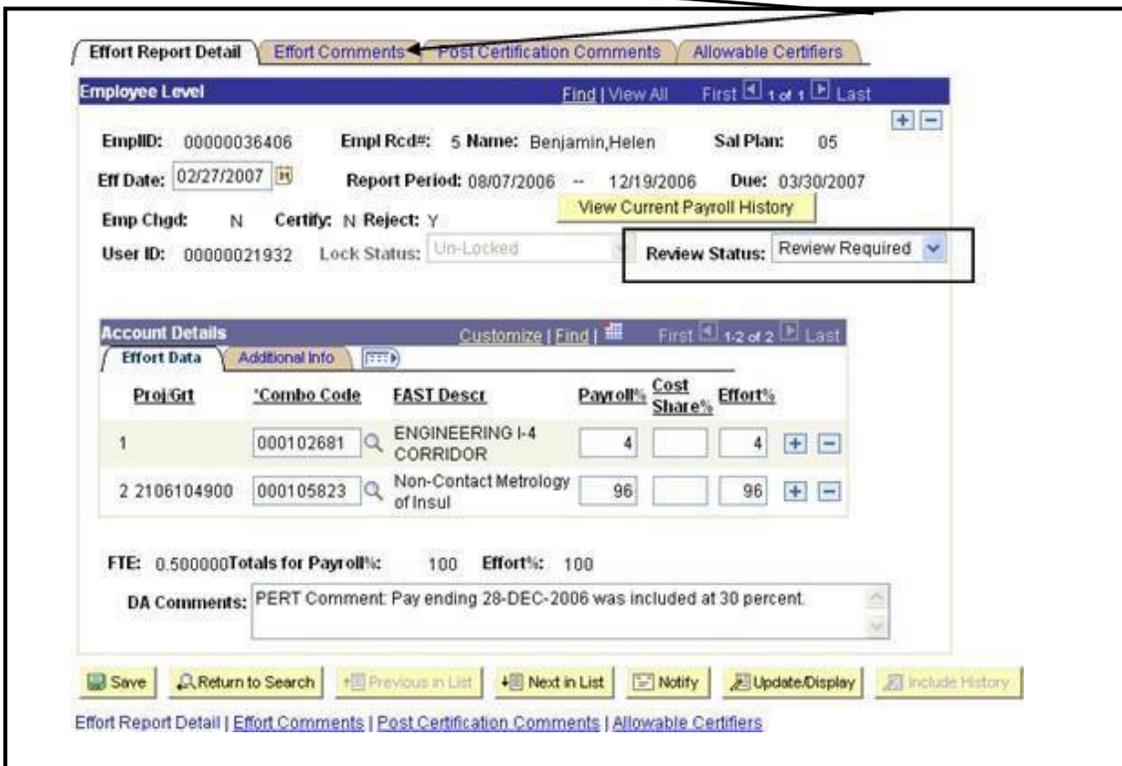
Include History  Case Sensitive

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

[Find an Existing Value](#) | [Add a New Value](#)

*Note: If multiple results are found matching the search criteria, a Search Results listing will appear at the bottom of the screen. Multiple rows may appear for each employee, representing multiple jobs (Empl Rcds) or multiple Effort Reports, each representing a different reporting period.*

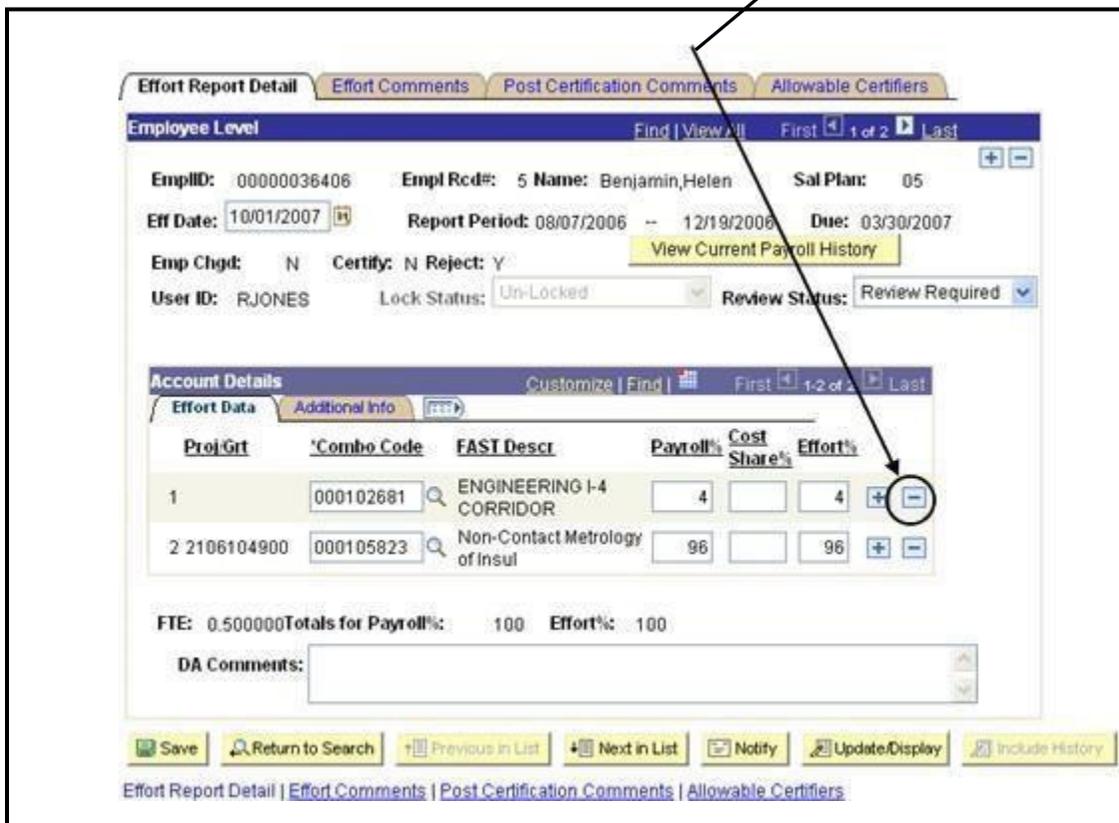
Step 2: The Effort Report Detail page displays for the rejected record. Records that have been rejected by the certifier have an additional item, the **Review Status** checkbox. Click the **Effort Comments** tab.



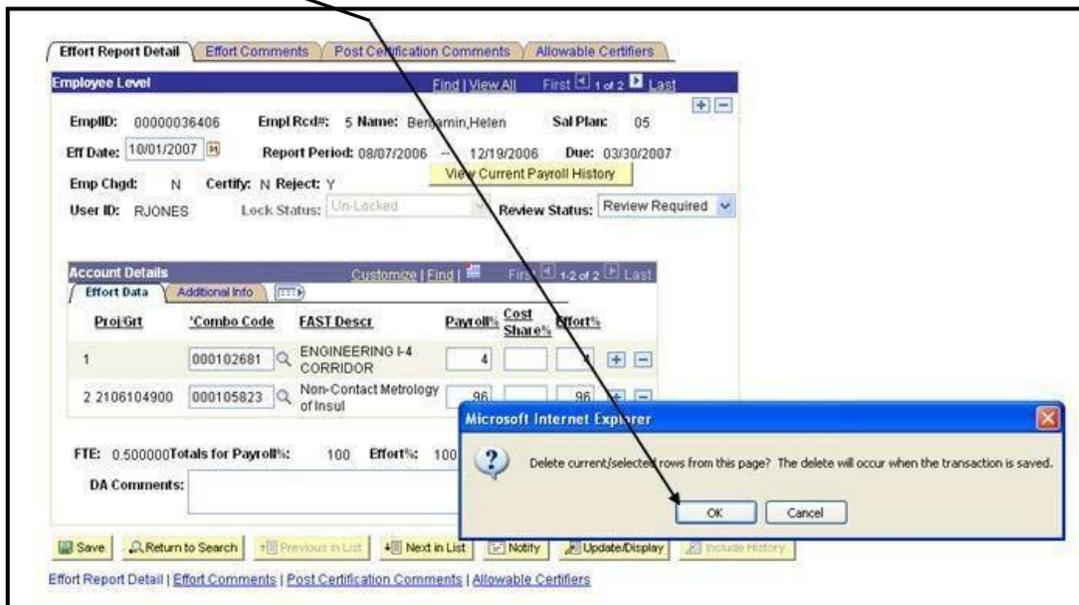
Step 3: Each report displays the comments that were saved for the report. Employees should leave an explanation for the rejection in the Comments box. Click the **Effort Report Detail** tab.



Step 4: Per the Employee Comments, update the Account Details to reflect 100% Payroll/Effort on FAST Combo Code 000105823. Click the **Delete row 1** icon.



Step 5: Click **OK** to confirm deletion of the row.



Step 6: Change the Payroll% to **100** (Effort% updates automatically) and **enter the reason** for the change in the DA Comments box.

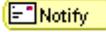
The screenshot shows the 'Effort Report Detail' interface. The 'Employee Level' section displays: EmplID: 00000036406, Empl Rcd#: 5, Name: Benjamin, Helen, Sal Plan: 05, Eff Date: 10/01/2007, Report Period: 08/07/2006 -- 12/19/2006, Due: 03/30/2007. The 'Account Details' section shows a table with columns: Proj/Grt, Combo Code, FAST Descr, Payroll%, Cost Share%, and Effort%. The first row has values: 1, 2106104900, 000105823, Non-Contact Metrology of Insul, 100, and 100. Below the table, it shows 'FTE: 0.500000 Totals for Payroll%: 100 Effort%: 100'. The 'DA Comments' field contains: 'Change reflects pending RET for PP 0703 - 4% from 000102681 to 000105823.' The 'Review Status' is set to 'Review Required'.

Step 7: Change the Review Status to **Review Complete**, this will make the report available again for certification. Click **Save**.

The screenshot shows the same 'Effort Report Detail' interface as in Step 6. The 'Review Status' dropdown menu is now set to 'Review Complete'. The 'DA Comments' field remains the same. The 'Save' button is highlighted with a red arrow.

Step 8: Notify the faculty member or other certifiers (for OPS) that the report has been corrected and is ready to be reviewed and if now correct, certified.

**Note:** Once changes are saved the  button can be used to notify the employee for certification review (non-OPS only).

If you choose to use the  feature, you must navigate to the Employee Effort Certification page and click the Notify button from the employee's effort report.

Once the **Send Notification** page appears:

- Enter the email address of the certifier in the **To:** field
- You may copy **(CC/BCC)** anyone else who should receive the notice
- Be sure to CC yourself, if using the **Notify** button.
- Select the **Priority** from the drop down list.
- Enter the **Subject**.
- Write a **Message** to the certifier. The message will appear in the body of the email.
- Click **OK** to send the notification.

### Send Notification

Type names or email addresses in the To, CC, or BCC fields, using a semi-colon as a separator.  
Click LOOKUP RECIPIENT to search for a name. Click DELIVERY OPTIONS to view or change the method of the send.

| Notification Details |                                                                                                                                                                     | <a href="#">Lookup Recipient</a> | <a href="#">Delivery Options</a> |
|----------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------|----------------------------------|
| <b>To:</b>           | <input type="text" value="sghiotto@research.usf.edu"/>                                                                                                              |                                  |                                  |
| <b>CC:</b>           | <input type="text"/>                                                                                                                                                |                                  |                                  |
| <b>BCC:</b>          | <input type="text"/>                                                                                                                                                |                                  |                                  |
| <b>Priority:</b>     | 1-High                                                                                                                                                              |                                  |                                  |
| <b>Subject:</b>      | Effort Report is Ready for Certification                                                                                                                            |                                  |                                  |
| <b>Template</b>      | Workflow Notification                                                                                                                                               |                                  |                                  |
| <b>Text:</b>         | Priority: %NotificationPriority<br>Date Sent: 2006-03-09                                                                                                            |                                  |                                  |
| <b>Message:</b>      | Dear Dr. Gulitz, your Fall 2005 effort report is ready for certification. Please contact me if you have any questions or concerns.<br>Your Dept PERT Representative |                                  |                                  |

Click OK to send this notification and exit this page. Click Cancel to exit this page without sending a notification.  
Click Apply to send this notification and remain on this page.

The notification message will look similar to the example below:



When the recipient clicks the emailed link, the system will prompt for the recipient's User ID and Password (unless the recipient is already signed onto FAST). Once signed on, the system will link directly to the Employee Effort Certification page from which the notification was sent.



## Mission Statement

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