Effort Certification Reviewer: Effort Administrative Review

This guide details the high level steps for an Effort Certification Reviewer during the effort certification process in Workday. This is the administrative review of an employee's effort distribution before an employee certifies their effort.

View Effort Certification Work Area and Select an Employee

1. Search for **Effort Certification Work Area** in the Workday search bar and select to open.

2. Select **My Work Queue** to view the employees whose effort require your review**.**

3. Select the **Review** button to open the Administrative Review of the Effort Certification for an employee.

Review Effort

1. Review the **Aggregate** tab for accuracy. Utilize the Administrative Review Checklist **HERE** for guidance.

2. If there are NO CHANGES, scroll down to add a comment that your review was complete and effort accurate.

3. Select **Submit** to send to Effort Certifier to certify their effort.

Effort Certification - Effort Changes

Change Effort

1. If effort is incorrect, select **Change Effort**.

2. This brings up a box with instructions and a link to a **REDCap** form. The REDCap for is used to request the cancellation of the employee's effort certification so that a PAA can be submitted to correct the effort allocation.

3. In the rare instance you need to add an attachment but not make changes, click **here** and follow the instructions.

(1) Change Effort

Cancel Effort Certification Request Form

Please use the form below to request cancellation of an outstanding effort certification. When we have processed your cancellation request, you will receive an email with instructions to request re-issue when all PAAs are through workflow.

(2) https://redcap.link/RequestEffortCertCancellation

(3) To add an attachment to the details tab, click here.

Step 1/1   Done

Cancel Effort Certification Request

1. Please read each item and provide the requested information.

2. **Submit to VUMC Finance**.

Cancel Effort Certification Request Form

Please use the form below to request cancellation of an outstanding effort certification. When we have processed your cancellation request, you will receive an email with instructions to request re-issue when all PAAs are through workflow.

Your information has been auto-filled using your VUMC ID. Communications related to this request to cancel an effort certification will be sent to the email address below.

Requestor First Name   Tesha

Please complete the information below for the effort certification you would like to cancel.

(1) **Certifier Full Name**   Clark Kent
* must provide value   First Last

Certifier Employee ID   0345678
* must provide value   0 characters remaining
                                              Please enter the full 7 digit EID

Effort Certification Period to Cancel   Federally Funded 7.1.24-9.30.24 ⌄
* must provide value

(2) Submit to VUMC Finance

Effort Certification - Effort Changes

Effort Cancellation Receipt & Instructions

1. Upon submission, you will receive a pop-up message confirming that the cancellation was received.

(1)

VUMC Finance has received your request.

Next steps:

1. We will cancel the effort certification in Workday.

2. You will receive a confirmation email that we cancelled the effort certification. **SAVE THAT EMAIL! It contains a link you'll need later.**

3. Complete all neccessary PAAs, ensure they are through workflow, then check the pro-forma effort report for accuracy.

4. Use the **unique** link provided in the confirmation email you received in step #2 to let us know the effort certification for Clark Kent Federally Funded 7.1.24-9.30.24 is ready to be re-issued.

5. We will re-issue the effort certification in Workday.

6. You will receive an email that the re-issued effort certification for Clark Kent Federally Funded 7.1.24-9.30.24 is now available in your effort certification work area.

As always, contact vumc.effort@vumc.org if you have questions or problems.

Thanks,

VUMC Finance Effort Team

[Close survey]

Effort Cancellation Confirmed & Next Steps

1. An Effort Cancellation Confirmation email will be sent to the Effort Certification Reviewer when the Effort Certification has been cancelled, within 24 hours. Retain this email as it will be needed to request the effort certification to be re-issued once PAAs have made it through workflow. Follow the instructions in the order they are listed in the email. The Pro Forma Effort Report guide is found HERE.

⭐ It is important to submit Payroll Accounting Adjustments (PAAs) to correct the employee's effort AND verify they are completed (by running Pro Forma Effort report) before requesting the re-issue of the employee's effort certification.

Effort Certification Cancelled: Clark Kent Federally Funded 7.1.24-9.30.24

VE VUMC Effort <vumc.effort@vumc.org>
    To ● Garcia-Taylor, Tesha D
    Thu 12/19/2024 9:55 AM

Hi Tesha - we have processed your request to cancel the effort certification for:

(1)

- **Certifier Name**: Clark Kent
- **Effort Certification Period**: Federally Funded 7.1.24-9.30.24
- **Date of Your Request**: 12-19-2024

Next steps:

1. SAVE THIS EMAIL. YOU'LL NEED THE LINK IN STEP #3 LATER.

2. Complete all neccessary PAAs, ensure they are through workflow, then check the pro-forma effort report for accuracy (How to Run the Pro-Forma Effort Certification Report).

3. Use the unique link Re-Issue Effort Certification Request Form to let us know the effort certification for Clark Kent Federally Funded 7.1.24-9.30.24 is ready to be re-issued. This link is unique to this effort certification. You will receive a separate email and link for each cancellation request.

4. We will re-issue the effort certification in Workday.

5. You will receive an email that the re-issued effort certification for Clark Kent Federally Funded 7.1.24-9.30.24 is now available in your effort certification work area.

If the link above does not work, try copying the link below into your web browser:
https://redcap.vumc.org/surveys/?s=SuvzHw9MfqfTCWml.

Thank you,

VUMC Finance Effort Team

Effort Certification Re-issue

Once all PAAs have been processed, made it through workflow, and confirmed in the Pro Forma Effort Report in Workday, the effort certification re-issue may be requested. After the effort certification is re-issued, the Effort Certification Reviewer will begin their Administrative Review again.

Re-issue Effort Certification

1. Complete the REDCap to re-issue the certification. The link is a unique one, for the period and employee, found in the email received after the certification was cancelled. Answer the REDCap questions correctly.

DO NOT submit this until all PAAs make it through workflow and are confirmed in the Pro Forma Effort Report.

(1) **Re-Issue Effort Certification Request Form**   A A A
                                                                                                               ⊞ ⊟

Please complete the form below to request re-issue of the effort certification listed below after all related PAAs are through workflow.

Please answer the questions below accurately with the actions you have taken. If you answer "no", please provide further explanation in the comment box below.

This form is to ONLY be used for Clark Kent Federally Funded 7.1.24-9.30.24 effort certification.

Effort Certification Re-Issue Request For:

Certifier Name: Clark Kent
Certifier EID: 0345678
Effort Certification Period: Federally Funded 7.1.24-9.30.24

I have completed all necessary PAAs in Workday related to the effort certification period above. **If you answer "no", please provide further explanation in the comment box below.** * must provide value	○ Yes ○ No reset
All PAAs are through workflow and I have reviewed the Pro Forma Effort Certification in Workday for Clark Kent Federally Funded 7.1.24-9.30.24. * must provide value	○ Yes ○ No reset
I would like VUMC Finance to re-issue the Federally Funded 7.1.24-9.30.24 effort certification for Clark Kent. * must provide value	○ Yes ○ No reset
Comments related to this effort certification.	[ ] Expand

Submit to VUMC Finance

Re-Review Effort and Submit Effort Certification

The Effort Certification Reviewer will receive an email notification that the re-issued effort certification is now available in their Workday Effort Certification Work Area. Complete the Administrative Review, referencing the Administrative Review checklist if needed. No changes should be needed as the PAAs submitted as a part of this process were completed. Verify the employee's effort is correct in Workday. Submit for the employee's review and certification.