

Effort Certification Procedure

William Paterson University maintains an effort certification system in accordance with the Office of Management and Budget Circular Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards (“Uniform Guidance”). The Uniform Guidance Subpart E 200.430 contains the federal regulatory requirements for internal controls over certifying time expended on sponsored projects. The University utilizes the Banner Effort Certification module, accessed via Banner 9 Self-Service to comply with Uniform Guidance requirements.

All individuals identified as “Covered Employees” in the WPUNJ Office of Sponsored Projects Effort Reporting Policy must follow these procedures for effort certification.

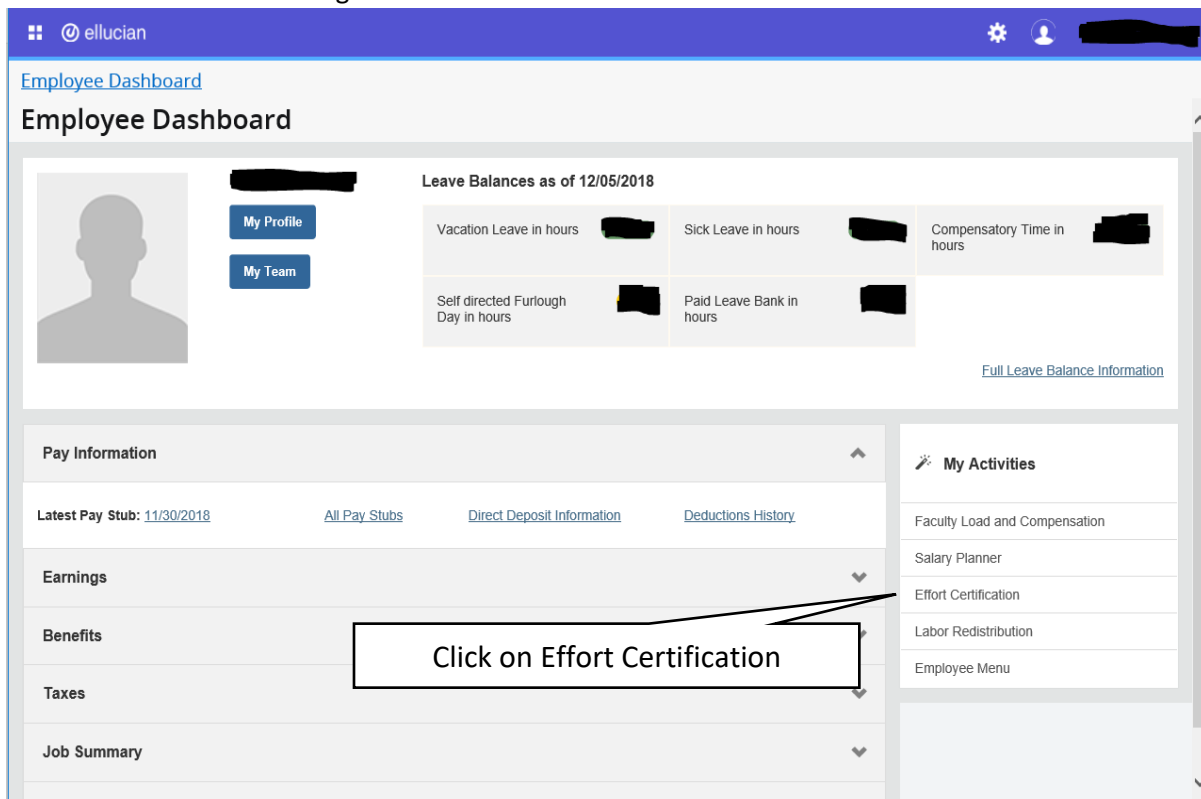
Certification is done monthly. Each month between the 1st and 15th of the month, your salary charged to a grant in the just-prior month is available for certification, and can be accessed on Banner 9 self-serve. If you have had salary charged to a grant in any month, you will get an email notification to log into Banner 9 self-serve and certify your effort. If the percentage of time charged or the Fund/Org are correct, certification is a simple process of clicking a few buttons. If the percentage and/or Fund/Org are incorrect, you will need to request a change following instructions below.

If you need assistance with this procedure or have questions, please contact Tamar Lamour (ext.: 2533; lamourt@wpunj.edu) or Glenda Jara (ext.: 2845; jarag1@wpunj.edu).

Procedure:

1. Log onto Banner 9 Self-Service and click on Effort Certification under My Activities:

Banner 9 Self Service landing screen:



2. In the Effort Certification Screen (the 'Certify My Effort' tab) you will see the periods open for certification:

Employee Dashboard » Effort Certification » Review Or Certify Reports

Review Or Certify Reports Proxy Super User Advanced Search

Print Open

Certify My Effort

A. Click on the line to highlight (highlight the period you want to certify – in this case NOV)

B. Then, click Open

COA	Period Code	Period Description	Name	ID	Start Date	End Date	Status	Unlocked/ Locked	Comments
U	NOV	November	[REDACTED]	855 [REDACTED]	12/01/2018	12/15/2018	Awaiting Certification	Unlocked	

Start Date and End Date: this is the timeframe in which you must certify for this period

Results found: 1

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3. You will then see this Effort Report screen:

Effort Report Pay Period Summary Comments Routing Queue

Sponsored

Fund	Organization	Effort Category	Charge Type	Effort
310218 US SBA P/T Rutgers -SBDC CY2018	405000 Small Business Dev Ctr	SERVICES Services	DIRECT	70

Total Sponsored Activity 70%

Non Sponsored

Fund	Organization	Effort Category	Charge Type	Effort
100000 State Approp Nonfringe	405000 Small Business Dev Ctr		DIRECT	30

Total Non Sponsored Activity 30%

Total : 100.00%

If the percentage(s) and FOAP(s) are correct, click "Certify"

If not correct, click "Request Changes" and an email form will pop up. Explain the change needed and email to lamourt@wpunj.edu

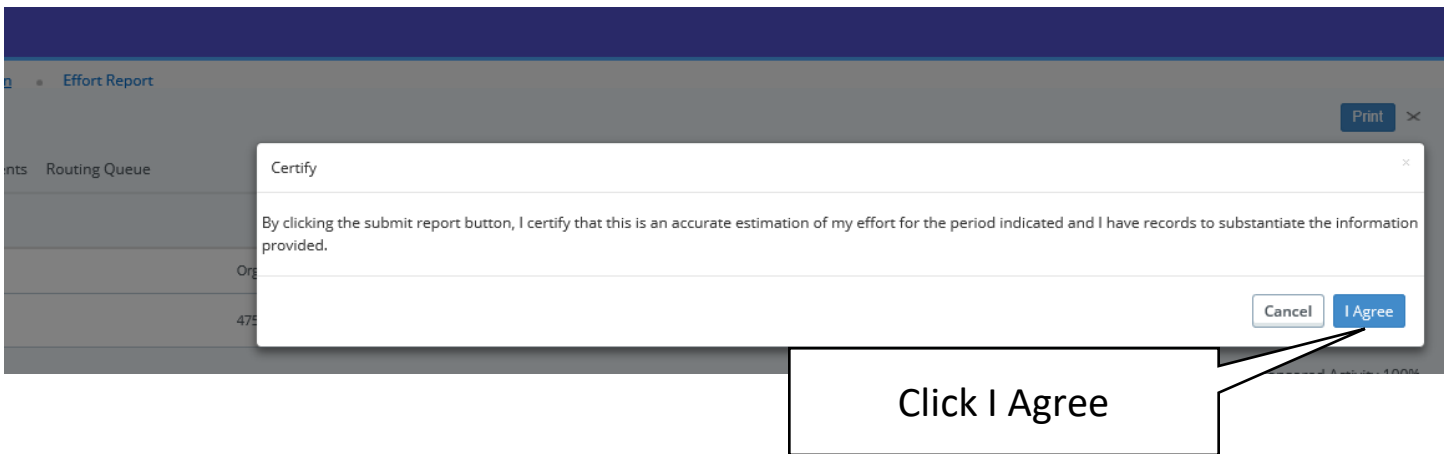
Request Changes Certify Add New Funding Save

DON'T USE: The "Add New Funding" function is not available. If funding changes are needed, use the Request Changes button instead and email the request to Lamourt@wpunj.edu

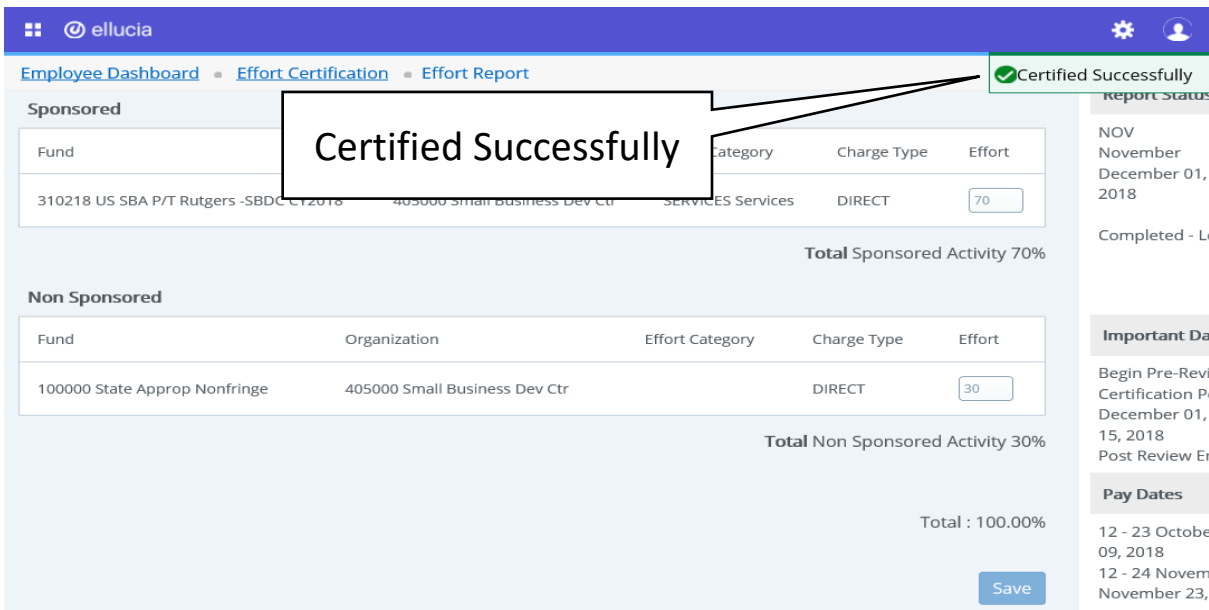
This screen shows FOAPS and percentages that add to 100% of your time. If they are correct, click the Certify button.

If there is anything incorrect about the percentage or the Fund/Org, click the Request Changes button – this will open an Outlook email form. You should address your email to Tamar Lamour (lamour@wpunj.edu), and describe what is incorrect and/or what changes should be made. If a reallocation is necessary, Tamar will initiate the process with Payroll.

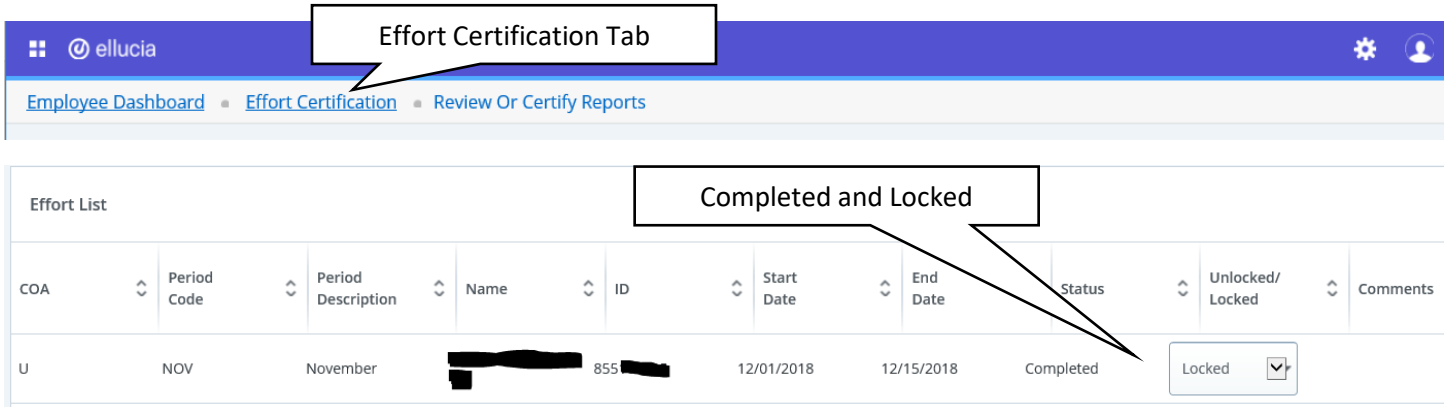
If correct, click the Certify button and you will get the below pop-up message. Click the I Agree button to finish the process.



After clicking I Agree, you will see "Certified Successfully":



- 4. Go back to the Effort Certification tab and you will see that the period you just certified shows as completed and locked.



You have now completed your effort certification for the month. Congratulations and thank you!

If you have requested changes (email to Tamar Lamourt) during this process, you will be notified after the changes are processed to log in and certify the revised effort allocations. In this case, go back to step 1 and follow these instructions from the beginning.