

**Effort Reporting Process Steps – Option to Add PI to Business Process in Financial System**

Current Process			Option for the Department to add Principal Investigator Process		
Workday Role	Unit	Responsibility	Workday Role	Unit	Responsibility
STEP 1: Effort Certification Manager	OSP Designee	For generating the quarterly effort reports and monitoring their completion	STEP 1 No change		
STEP 2: Effort Certification Reviewer (ECR)  (assigned by department)	Determined by Department  This person can add the PI into the business process	For validation of payroll, cross check correct account number and amount per month (e.g., per LOA, contract agreement).  If this person adds an additional person to the review business process it still requires this role to be the reviewer of payroll	STEP 2 Effort Certification Reviewer (ECR)  **This cannot be changed in WD	Determined by Department  <b>REQUIRED:</b> This person MUST add the PI into the business process	Still responsible to verify payroll, however this person can add Additional Reviewer which can be the PI.  This would require them to know which GR is assigned to which Worktag Owner = PI
<b>STEP 3 - OPTION</b> *Added by Departmental Reviewer  Additional Reviewer	PI = Worktag Owner  or  Supervisor	The PI can review to ensure that this person did work on the GR for the amount stated on the form. Review then submit for next steps	<b>STEP 3 – REQUIRED:</b>  **Must be added by Step 2 designee	PI=Worktag Owner	No change
STEP 4: Certifier	Employee	Responsible for the accurate reflection of work completed on the GR. If they have questions or concerns with the report they need to communicate with the reviewer prior to certification. In some exceptions (e.g., terminations), the task can then be reassigned to the PI or Manager for certification.	STEP 4 No change		
STEP Other occurs between steps 1-4 prior to certification  Grant Manager	Determined by Department  Only for Correspondence & Reassignments	Responsible when tasks get reassigned this role turns into the role of departmental reviewer if they do not have the security role to process PAA/Change effort as needed, then process continues	STEP Other  No changes		