Effort Reporting Step-by-Step Guide

Illinois Tech - Research Administration Services
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Introduction

Effort certification is a vital compliance process that ensures the accuracy of salary charges on sponsored research projects. This guide provides a step-by-step walkthrough for certifying your own effort or the effort of team members working on your grants.

System Access

1. Login: Access the system via the Illinois Tech portal.

2. Troubleshooting Login Errors:

   - If you receive a log-in credential error, log out of the portal and log back in.

   - If issues persist, submit a support ticket to the OTS Support Desk at supportdesk@illinoistech.edu.

The System: Access
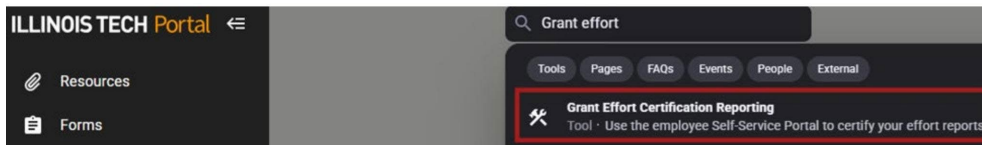
- If you receive an error when selecting the tool that your log-in credentials are invalid, try logging out of the Illinois Tech portal and log back in to proceed.

- If you are still unable to get into the effort certification system, you will need to submit an OTS Support Desk ticket via supportdesk@illinoistech.edu.

System Navigation

Options:

- Certify My Effort: Use this to certify your own effort.

- Review or Certify Reports: Use this to certify the effort of individuals working on your grants.

Tip: Choose the correct option based on your role in the certification process.

The System: Navigation

- Click "Certify My Effort" to certify your own effort

- Click "Review or Certify Reports" to certify the effort of others who worked on your grants

Searching for Reports

Search Instructions:

1. Click Advanced Search.

2. Required: The "Chart of Account Code" field must always be filled.

3. For best results:

   - Use COA Code: 1 (Institutional Funds).

   - Set Status to: Awaiting Certification.

Important: Leaving the COA Code field blank will prevent search results from displaying correctly.

The System: Search

- Use "Advanced Search" to look up employee effort using multiple search fields. The Chart of Account Code field **must be populated** for all searches.

- For best results, filter by Chart of Account Code "1" and Status "Awaiting Certification".
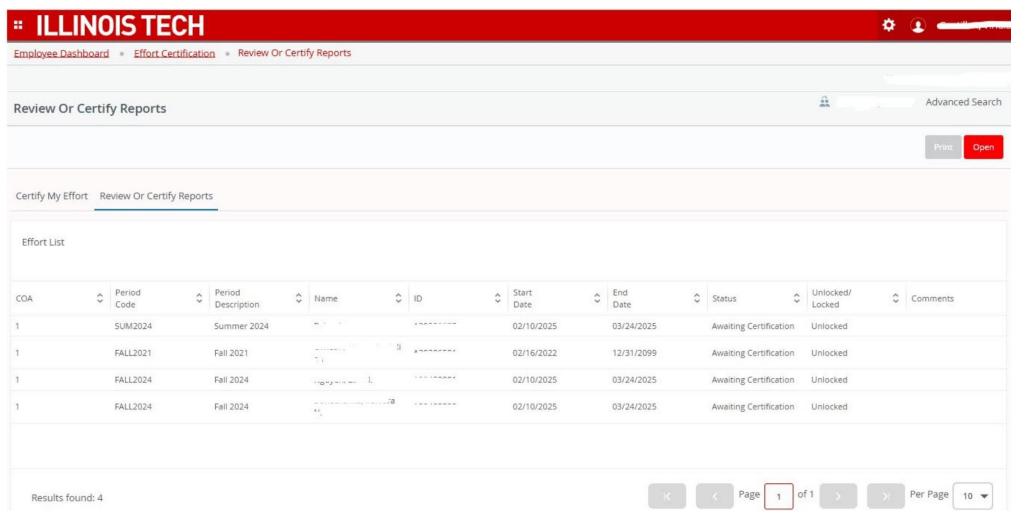
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Reviewing Search Results

1. A list of reports awaiting certification will appear.

2. Double-click on each report to open it for review.

3. What to Check:

   - Period code and description.

   - Start and end dates.

   - Correct allocation of effort percentages.

   - Associated grant numbers.

Ensure all effort details match your records before proceeding.

The System: Results

- You should see a list of reports that are awaiting certification
- Double click each report to open for review

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Reviewing and Certifying Reports

1. Carefully review all report sections, including Sponsored and Non-Sponsored Activity.

2. Do not use:

   - "Request Changes" button.

   - "Add New Funding" button.

Why? These buttons do not communicate with the University's payroll system and will not result in actual changes.

3. If the report is correct, click Certify.

4. Read the certification statement carefully.

5. Click I Agree to complete the certification.

If corrections are needed, contact Research Administration Services directly at ras@illinoistech.edu.

The System: Report View

The System: Certify

! *Note*: Do not select the "Request Changes" or the "Add New Funding" button. These options do not communicate or change anything in the University's payroll system.

Important Certification Notes

The certification statement is a binding acknowledgment that the reported effort is accurate.

Significant discrepancies in effort must be corrected through proper administrative channels, not via the system buttons.

Troubleshooting and Support

Contact Research Administration Services at ras@illinoistech.edu for unresolved issues or further assistance.

Contact OTS at support@illinoistech.edu for technical support.

The System: Report Issues/Request Changes

- Please review the "Effort Certification FAQs" document to find answers to common questions about effort certification.
- If you need further assistance, please contact Research Administration Services via email at ras@illinoistech.edu.

Quick Reference Checklist

☐ Log into the Illinois Tech portal.

☐ Select the correct certification option.

☐ Use Advanced Search with COA Code "1" and Status "Awaiting Certification".

☐ Review search results for accuracy.

☐ Double-click reports to open.

☐ Confirm grant details, effort percentages, and reporting periods.

☐ Do not use "Request Changes" or "Add New Funding" buttons.

☐ Certify the report if accurate.

☐ Contact Research Administration Services if changes are required.