Step-by-Step Instructions

Access Banner Effort Reporting

To view your reports that are “Awaiting Certification”, click on the column heading “Status” to sort by that column. All reports with the status equal to “Awaiting Certification” will appear at the top of the list. Double click on each report to perform your certification.
View the Effort Report Detail

1. **Effort Report**
   - Pay Period Summary
   - Comments
   - Routing Queue

2. **Comments**
   - Click here to view any comments associated with your report.

3. **Routing Queue**
   - You can click on any e-mail link to send an e-mail to any individual on the routing queue.

For Administrative Use ONLY.
Pre-Review and/or Certify the Effort Report

NOTE: Do NOT choose the Review or Certify buttons if you have not reviewed the report, or if you do not agree with the percentage of effort allocations or funding. If you have any concerns whatsoever about the accuracy of the report, you should choose the Request Changes button until your concerns are addressed.

To certify that the effort is correct, click “Certify”.

Please read the statement and understand what you are signing.
State and Status Defined – Search and Filter Effort Reports

- **STATE - Unlocked**: All actions take place while the effort report is in a state of Unlocked. As long as a report is Unlocked, changes can be made to the effort report at any time. During an Unlocked state, the effort report can be in any status. If the Unlocked report is in a status of Completed, it means the report was once Locked, and has since been Unlocked.

- **STATE - Locked**: The effort report must be in a status of Certified before it can be Locked, indicating that all required actions have been completed. After locking the report, the status will change to Completed, and no more changes can be made to the effort report, unless it is first unlocked by a Superuser.

- **STATE – Changes Submitted**: The Request Changes button has been selected, and the effort report is on hold until the changes have been processed, or the Clear Changes button has been selected.

- **STATUS - Under Review**: The effort report is awaiting review by all assigned Pre-Reviewers before certification can take place. After all Pre-Reviewers have completed their mandatory review actions, the status will change to Awaiting Certification.

- **STATUS - Awaiting Refresh**: A payroll action, such as a fund source change (PHAREDS), has been processed. An authorized user must then click the Update Report button displayed on the Effort Report Overview sidebar to refresh the report. This brings in the changes, and the effort report will no longer display the original incorrect information. The status will then return to Under Review, so the Pre-Reviewers can complete their actions.

- **STATUS - Awaiting Certification**: All mandatory review actions have been completed by all the Pre-Reviewers, and the report is ready to be certified by the Employee or Alternate Certifier. The status will change to Certified after the effort report has been certified.

- **STATUS - Certified**: All mandatory review and certify actions have been completed, but the effort report has not been locked.

- **STATUS – Completed**: When the certified effort report is locked, the status changes to Completed. This status remains even if the effort report is subsequently unlocked by a Superuser, until an event occurs that changes the status (i.e. request changes, correction, re-run the Effort Report, etc).

- **STATE/STATUS – Changes Saved/Returned for Correction**: N/A – these State and Status items are used only with the Labor Redistribution Module, which is not being implemented at this time.