Effort Certification Calculation Tool Instructions

Purpose
The purpose of the Effort Certification Calculation Tool is to provide assistance with the Effort Certification process. This tool consists of two parts: the Certification Percentage Worksheet, and the Certification Calendar.

The Worksheet assists in calculating the percentage of effort and identifies when an Amended Effort Certification Statement is required. The Worksheet permits up to eighteen accounts to be entered for percentage calculation, with six accounts per page. If more than eighteen accounts are to be certified, please contact the Institutional Effort Coordinator in Sponsored Projects Administration (SPA) for assistance (503-494-3211 or spaeffrt@ohsu.edu).

The Calendar assists in determining the number of days per month that an employee works. The Calendar can be used to calculate the effort percentage for a single account when there is a change in payroll distribution percentage during the month or when the employee works a partial month.

Instructions
The areas in yellow are data input cells. All other cells are protected.

Certification Percentage Worksheet

{1} Employee: Enter the name of the employee for whom effort is being certified.

{2} Account #: Enter the account number of the OGA Project or GL account for which effort is being certified.

{3} Date Range: Enter the inclusive dates during which the employee worked on this account.

{4} Days Worked on this Project During the Month: For each month, enter the number of days during the month the employee worked on this project. If the employee did not work on the account during the entire month, use the Calendar (instead of the Worksheet) to calculate the effort percentage for the account. (See Instructions for the Certification Calendar if changes occur during a month.)

{5} Pay Distribution Percentage: For each month, enter the payroll distribution percentage for the employee for this account. If the payroll distribution percentage changed during the month, use the Certification Calendar to calculate the effort percentage for the month. (See Instructions for the Certification Calendar if changes occur during a month.)

{6} % from Pre-Printed ECS: Enter the effort percentage as it appears on the Pre-printed Effort Certification Statement. If the account being certified was not included on the ECS, enter zero (0).
Note: With the entry of the data in fields {4}, {5} & {6}, the Worksheet is designed to calculate the Effort Certification Percentage for a single project {7}, identify whether there is variance of 5% or more from the original ECS percentage {8}, and identify if an Amended ECS is needed for this project {9}. Accumulative information for all projects on the Worksheet is also determined {10} & {11}.

{7} Percent Effort for this Account for the Certification Period: The percentage of effort calculated is based on the data provided. If this calculation differs from the percentage for this account on the Pre-Printed Effort Certification Statement, enter this percentage on the Amended ECS.

{8} Variance is 5% or more of Pre-Printed Percent: The Worksheet will identify either “Yes” or “No” for this account depending on the data entered.

{9} Amended ECS Required for the Account: The Worksheet will identify either “Yes” or “No” for this account depending on the data entered.

{10} Total Percentage: The Worksheet will calculate the Effort Percentage of all accounts on the Worksheet. The total percentage should be 100.00%. If it is not, check each account for accuracy. If the employee works less than 1.0 FTE or if the percentage is less than 100%, contact the Institutional Effort Coordinator (SPA Effort Coordinator).

{11} Amended Effort Certification Statement Required for this Employee: The Worksheet will identify if an Amended ECS is required for this employee.

Certification Calendar

{12} Employee: Enter the name of the employee for whom effort is being certified.

{13} Account #: Enter the account number of the OGA Project or GL account for which effort is being certified.

{14} Date Range: Enter the inclusive dates during which the employee worked on this account.

{15} Days Worked on this Project During the Month: For each week, enter the number of days the employee worked on this project.

{16} Pay Distribution Percentage: For each week, enter the payroll distribution percentage for the employee for this account. If the payroll distribution percentage changed within a week, contact the Institutional Effort Coordinator for assistance.

{17} Percent Effort for this Account for the Month: The percentage of effort is calculated based on the data provided for each week.

{18} Total Days Worked during this Certification Period. The number of days the employee worked on this account during the Certification will be calculated and entered here.
{19} **Days Worked:** The number of days worked will auto-fill from data entered in the month/week calendar. Enter the data from this column into {4}, Days Worked on this Project During the Month, of the corresponding account on the Certification Percentage Worksheet.

{20} **Pay Distribution Percentage:** The pay distribution percentage will calculate and auto-fill from data entered in the month/week calendar. Enter the data from this column into {5}, Pay Distribution Percentage, for the corresponding account on the Certification Percentage Worksheet.

**NOTE:** If the information is being moved using the Copy function, use Paste Special/Values.

**General**
When an Amended Effort Certification Statement is required, attach a copy of the Effort Certification Calculation Tool, a copy of the labor distribution adjustment and a justification statement for the change.

Questions related to the use of the Effort Certification Calculation Tool, should be addressed to Michael Clark, the SPA Institutional Effort Coordinator (503-494-3211 or spaeffrt@ohsu.edu)