Workday Effort Certification: Newly Created Role

Please share this communication with other individuals that may find this information helpful.

In support of the community’s request for enhanced Effort Certification features, the Workday Effort Certification process includes a newly created role, the Effort Analyst (ECA). The purpose of this role is to facilitate departmental monitoring of the overall Effort Certification process and provide support to Effort Certifiers.

The ECA’s access to Workday’s Effort Certification module is view-only with the ability to run monitoring reports supporting Yale’s Effort Certification process essential in supporting the responsibilities associated with the role of the ECA.

Responsibilities of the ECA include:

- Understanding and working knowledge of Yale’s policies/procedures including but not limited to effort commitments, effort reporting, and cost transfer
- Responding to department personnel questions regarding effort reporting policies and procedures; and
- Monitoring the completion of Effort Certification Statements (ECS), ensuring proper review, and escalating ECS issues in a timely manner so that certification is in accordance with the due dates established by the University.

Similar to the Effort Certification Reviewer, the ECA is required to complete all effort related training and is assigned to the ECA role based on the Grant Role Hierarchy.

Required training includes the following training guides and courses:

- Assign Payroll Costing Allocation – Workday Training Guide
- Create Payroll Accounting Adjustments – Workday Training Guide
- Cost Transfer Principles – Office of Sponsored Projects Training Class
- Effort Principles – Office of Sponsored Projects Training Class
- Effort Certification in Workday – Workday Training Guide

In order to assign an individual to the ECA role, the Operations Manager or Lead Administrator must submit a request to Effort.Reports@yale.edu. The request follows:

<table>
<thead>
<tr>
<th>Last Name</th>
<th>First Name</th>
<th>Net ID</th>
<th>Grant Hierarchy ID/Name*</th>
<th>Requester Name</th>
<th>Requester Contact Information</th>
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*If the Grant Hierarchy Name(s) or ID(s) is unknown, please provide information about the department to assist the Effort Certification Manager with identifying Role Assignments Hierarchy.

All questions regarding the ECA role and/or the effort reporting process should be directed to Effort.Reports@yale.edu.