

Effort Certification Document

Reassign Instructions

The **Reassign** function allows you to return the effort document to the assigned *reviewer* or *certifier* listed on the **All-Person** column. See **exhibit A**

- Use the **Reassign** function if the **Save for Later** button was clicked and the effort document is now locked in your inbox or if the effort document was submitted and another reviewer needs to make adjustments to the effort document. **Note:** If the effort document is awaiting certifier approval, contact the certifier to **(Send Back)** the document to reassign it to the correct *reviewer* or *certifier*.

Exhibit A

Summary

Aggregate

Details

Positions

Organizations

Process History

Process History 6 items

Process	Step	Status	Completed On	Due Date	Person (Up to 5)	All Persons
Effort Certification	Effort Certification	Step Completed	05/27/2022 06:35:01 PM		Maria Hernandez	1
Effort Certification	Administrative Review	Awaiting Action			Andres Chan (Effort Certification Manager (Unconstrained))	19

19 items

All Persons

Andres Chan (Effort Certification Manager (Unconstrained))
Ben Bell (Effort Certification Reviewer)
Carmen Hernandez (Effort Certification Reviewer)
Caroline Sakai (Effort Certification Reviewer)
Catherine Velazquez (Effort Certification Reviewer)
Janet Stoeckert (Effort Certification Reviewer)

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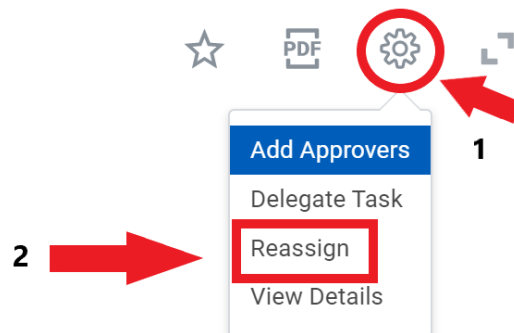
Below are **two methods** of locating the ***Reassign*** Function.

Method 1

Step#1 Open the ***Effort Certification Document (ECD)*** using the **Inbox**.



Step#2 Click the ***Task Actions*** wheel icon located in the document's upper right corner, then click the ***Reassign***.



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Step#3 Click the hamburger menu to select the employee to whom the **Effort Certification Document (ECD)** is being returned. Next, enter the reason for the reassignment in the **Reassignment Reason** box and click the **OK** button.


Reassign This Task

20 day(s) ago - Due 05/30/2022

To reassign a step, you must enter a reason in the Reassignment Reason field.

Business Process * Payroll Accounting Adjustment: Daniel Hackman - 08/01/2021 - 12/31/2021

My Tasks 1 item

Step	Business Process	Subject	Due Date	Proposed Person	Reassignment Reason
Create Payroll Accounting Adjustments	Payroll Accounting Adjustment: Daniel Hackman - 08/01/2021 - 12/31/2021	Daniel Hackman	05/30/2022		

1 Select the proposed person from the menu

2 Enter a reason

Proposed Person

Reassignment Reason

Search

- Effort Certification Manager (Unconstrained)
- Effort Certification Reviewer**
- Implementers
- ISSG-effortcertbot (User-based)
- USC Effort Certification Administrator

Select (Effort Certification Reviewer)

Step#4 once the reassignment request is finalized by the ITS Dept., the effort document will appear in the associate's inbox.

You have submitted

Up Next: Maria Hernandez | PI Certification of Active Student | Due Date 06/27/2022

[View Details](#)

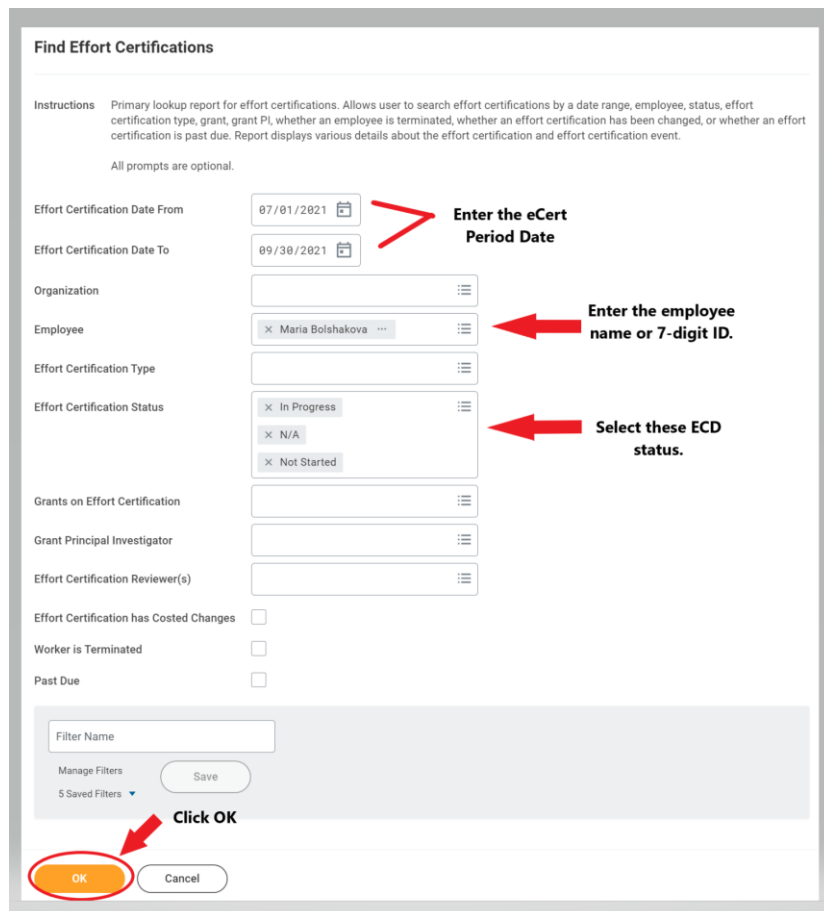
Review

Effort Certification Document

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Method 2


Step#1 *Open* the *Effort Certification Document (ECD)* using the **Find Effort Certifications** report.




Find Effort Certifications

Instructions Primary lookup report for effort certifications. Allows user to search effort certifications by a date range, employee, status, effort certification type, grant, grant PI, whether an employee is terminated, whether an effort certification has been changed, or whether an effort certification is past due. Report displays various details about the effort certification and effort certification event.

All prompts are optional.

Effort Certification Date From: 07/01/2021  **Enter the eCert Period Date**

Effort Certification Date To: 09/30/2021 

Organization:

Employee: **Enter the employee name or 7-digit ID.**

Effort Certification Type:

Effort Certification Status:

 Select these ECD status.

Grants on Effort Certification:

Grant Principal Investigator:

Effort Certification Reviewer(s):


Effort Certification has Costed Changes: ☐

Worker is Terminated: ☐

Past Due: ☐

Filter Name:

Manage Filters:

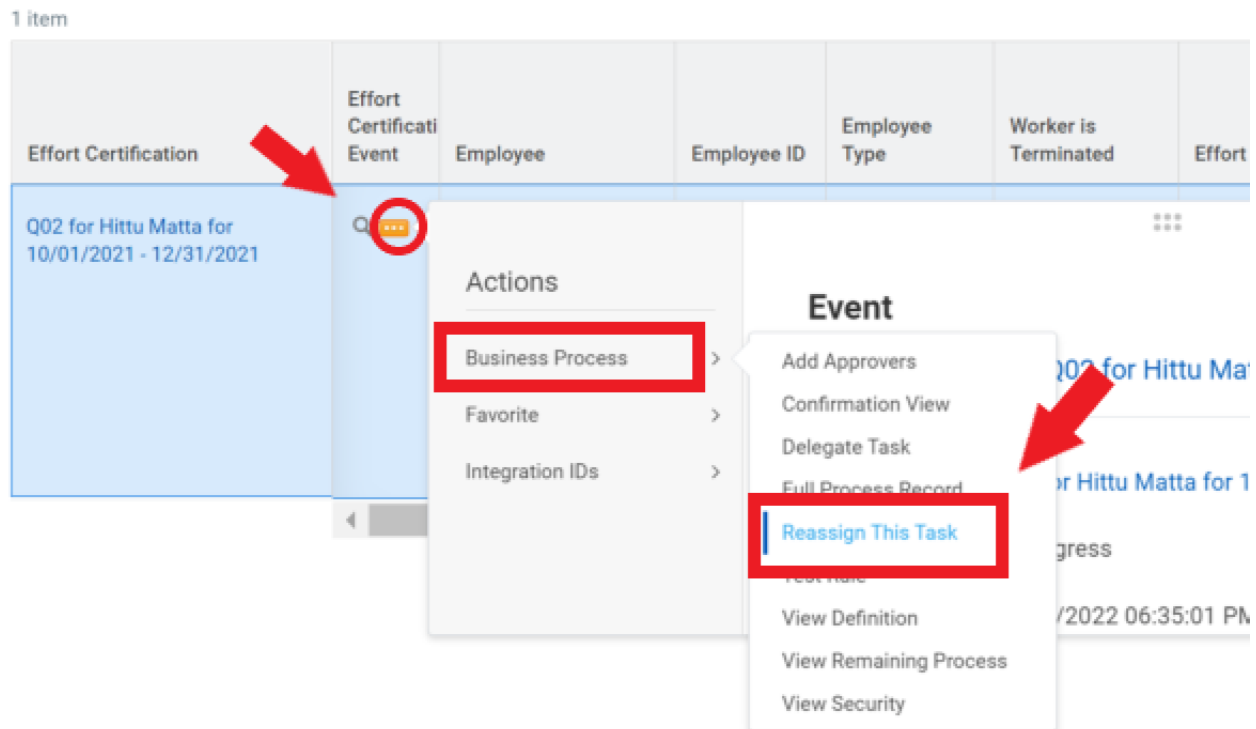
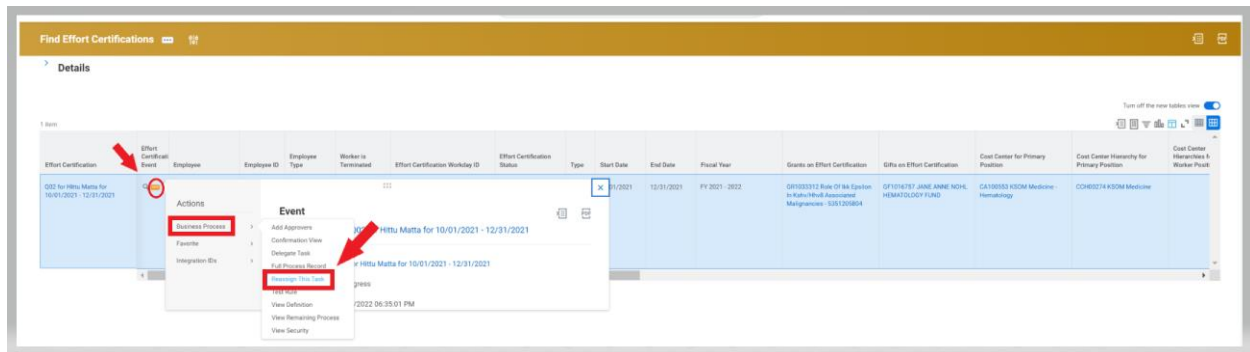
5 Saved Filters 

Click OK

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Step#2 Click the (...) *ellipsis* to open the submenu, and click on the **Reassign This Task**.



Step#3 Click the hamburger menu to select the employee to whom the **Effort Certification Document (ECD)** is being returned. Next, enter the reason for the reassignment in the **Reassignment Reason** box and click the **OK** button.

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Reassign Instructions

Reassign This Task

20 day(s) ago - Due 05/30/2022

To reassign a step, you must enter a reason in the Reassignment Reason field.

Business Process ★ Payroll Accounting Adjustment: Daniel Hackman - 08/01/2021 - 12/31/2021

My Tasks 1 item

Step	Business Process	Subject	Due Date	Proposed Person	Reassignment Reason
Create Payroll Accounting Adjustments	Payroll Accounting Adjustment: Daniel Hackman - 08/01/2021 - 12/31/2021	Daniel Hackman	05/30/2022	<input type="text"/>	<input type="text"/>

1
Select the
proposed person
from the menu

2
Enter a reason

Proposed Person	Reassignment Reason
<input type="text" value="Search"/> <ul style="list-style-type: none"> Effort Certification Manager (Unconstrained) Effort Certification Reviewer Implementers ISSG-effortcertbot (User-based) USC Effort Certification Administrator 	<input type="text"/>

Select (Effort
Certification Reviewer)

Step#4 once the reassignment request is finalized by the ITS Dept the effort document will appear in the associate's inbox.

You have submitted

Up Next: Maria Hernandez | PI Certification of Active Student |
Due Date 06/27/2022

[View Details](#)

[Review](#)