LOGGING INTO THE SYSTEM

Sign into your MyASU and in the Research Tools field select Effort Reporting and then Effort Reporting by Employee this will take you to your queue (do not change any information).

***Secondary IDs (e.g., RA or PS) will not give the user access to the Effort Reporting work queue. Users must login with their regular ASURite username.***

OPENING A FORM

Verify that the My Work Queue Only checkbox is checked and click the Search button to retrieve effort reports. You may also enter search criteria to query for certain reports. For a detailed explanation of search criteria, see the Effort Reporting Guide – DEA.

1) A listing of reports will be generated if there is more than one report with the requested search criteria.
   a. Select the appropriate line to open the effort report.
2) If a form automatically appears, there will only be one effort report with the requested search criteria.
3) If no forms appear, there are no matches to your search criteria. You may either engage other search criteria or log off.

DEA REVIEWER

1) Verify that all the projects the employee worked on during the effort period are listed on the applicable effort report. Click the project number link to open the project information window.
   a. If all projects are included, proceed to step 2.
   b. If all projects are not included, either direct pay or cost sharing will need to be adjusted.
      i. To adjust payroll, create a payroll redistribution(s) to adjust payroll data. See step 4.
      ii. To adjust Cost Sharing, contact ORSPA’s Effort Reporting Team.
2) Verify the accuracy of all cost sharing information by expanding the Sponsored Section by clicking the button in the Sponsored Funding section of the form. The Sponsored Funding section will include the payroll and cost sharing (if applicable) splits for each project.
   a. If Cost Sharing data is not present on the effort report, proceed to step 3.
   b. If Cost Sharing data is present, verify that the percentage stated is the correct percentage for the effort reporting period. Also, please verify that the distinction between cost sharing generated from a companion account and committed module is correct. Verification can be made by checking award documentation, Form 315, and/or consulting with the PI. If changes are necessary, contact ORSPA’s Effort Reporting Team.
3) Verify that the Payroll Distribution percentages and dollars for each account listed are correct for the effort reporting period by clicking the button to expand the Sponsored Section and click on the Account level link in the Gross Payroll column.
   a. If changes are not necessary, proceed to step 5.
   b. If changes are necessary, proceed to step 4.
4) Please visit http://researchadmin.asu.edu/cost_transfers regarding online payroll redistributions
   a. Once submitted, please allow 2-3 business days for the transfers to post to the applicable effort report.
5) To determine which approval queue the report is currently in:
a. Click the icon on the effort report.
b. The approval queue will be listed next to the project line(s).

6) To add a comment, click the icon next to the project line (Line Level) or click the icon next to the approval button (Header Level)
   a. To view all comments, click the View All link at the top of the comments form.
   b. A record of the comment will be kept with the effort report once the effort report is saved.

7) To view the Audit Details, click the icon next to the project line (Line Level) or click the icon next to the approval button (Header Level).

8) To view an error ( ), information ( ) or warning message ( ), simply click the appropriate icon. An explanation of the message will be provided along with what action should be taken to resolve the issue, if applicable. All Line Level errors must be resolved before an effort report can be moved to the next stage. See the Error Message Key for further guidance on error messages.

**DEA APPROVER OR REJECTING THE FORMS**

9) Select the button at the upper right-hand side of the form.

10) Select the appropriate option from the action box and click OK:
   a. Certify/Approve: the form will be approved and moved into the appropriate Effort Certifier’s work queue and the form will be automatically saved.
   b. Reject: the form will be rejected and returned to the ORSPA work queue. The form will be automatically saved. Please do not reject the form if you have not first spoken to the ORSPA Effort Team. This selection can be used if the form does not belong to your department or if ORSPA has suggested a rejection. If rejecting the form, a comment must be entered in the provided text box. Please be specific about any issues you see with the form or any questions you may have.
   c. None: no action will be taken and the form will remain in your work queue with the option to approve at another point in time. The form will not be automatically saved. To save any changes, click the button at the bottom of the form.
   d. Any comments added in the comment box will be retained with the effort report at the Header Level.

**AFTER APPROVAL OR REJECTION OF A FORM – NEXT STEPS**

11) Choose whether to review other effort reports or log out of the effort reporting system.
   a. To review other effort reports:
      i. To view other reports which match your original search criteria, click the button.
      ii. Or, select the button to revise your search criteria. Remember to check your work queue before determining if your tasks have been completed. See the next step for verifying that your work queue is completed.
   b. To log off, click the Sign Out option in the upper right-hand corner of the screen.

12) To verify that you have reviewed and approved all effort reports in your work queue:
   c. From the Search screen, verify that the My Work Queue Only checkbox is checked and click the button to display the results. If no results are returned, you have completed all forms in your work queue. If effort reports are still present, return to the beginning.

**LOGGING OFF**

13) Click the Sign Out option in the upper right-hand corner of the screen.