

Effort Certification: Instructions for Certifiers

(Last Update - Dec 2008)



1. Log into the Spectrum Portal

Go to the Web site <http://spectrum.memphis.edu> and login to the Spectrum Portal using your UUID and password. The username and password required to enter the Portal are the same username and password you use to login to your University e-mail and UMdrive accounts. If you have trouble logging in, contact the ITD Helpdesk at (901) 678-8888.

2. Locate and click on the channel for **Effort Certification** on either the Employee or Faculty tab.

3. The **Summary** tab presents your data for the certifying period. **Review the data.** To see more details from the accounting system on each of the lines, click on **Show Codes**. To understand how the percentages were derived, click on **Detail** to see actual payroll distribution data by month.

4. If the data are correct, click **Certify** to complete the effort certification process. (Please note that if you are also the **Expected Approver** on any grant on your effort form, you must click **Certify**, return to the effort form, and then click **Approve**.)

5. If you need to adjust the percent of effort distribution and the change is greater than 5%, revise the **Certified %** column to reflect your estimation of your effort for this time period. Click **Certify** to complete the effort certification process.

6. If you believe that a grant that you expended effort on needs to be added,

6a. Click **Add lines**.

6b. Include as much detail about the grant as you can. If you know the specific Fund, Org and Prog codes of your grant, click **Show Codes (3)** followed by **Add lines (6a)**. Enter the Fund, Org, and Prog codes in the corresponding boxes.

6c. Revise the **Certified %** column (Total must equal 100%).

7. Click **Save Changes** when finished. Grants Accounting will be contacting you to complete the process. The **Save Changes** button allows the certifier to save changes made to the form. If **Save Changes** is clicked after the form has been certified, approved, or both, the form will have to be certified and approved again.

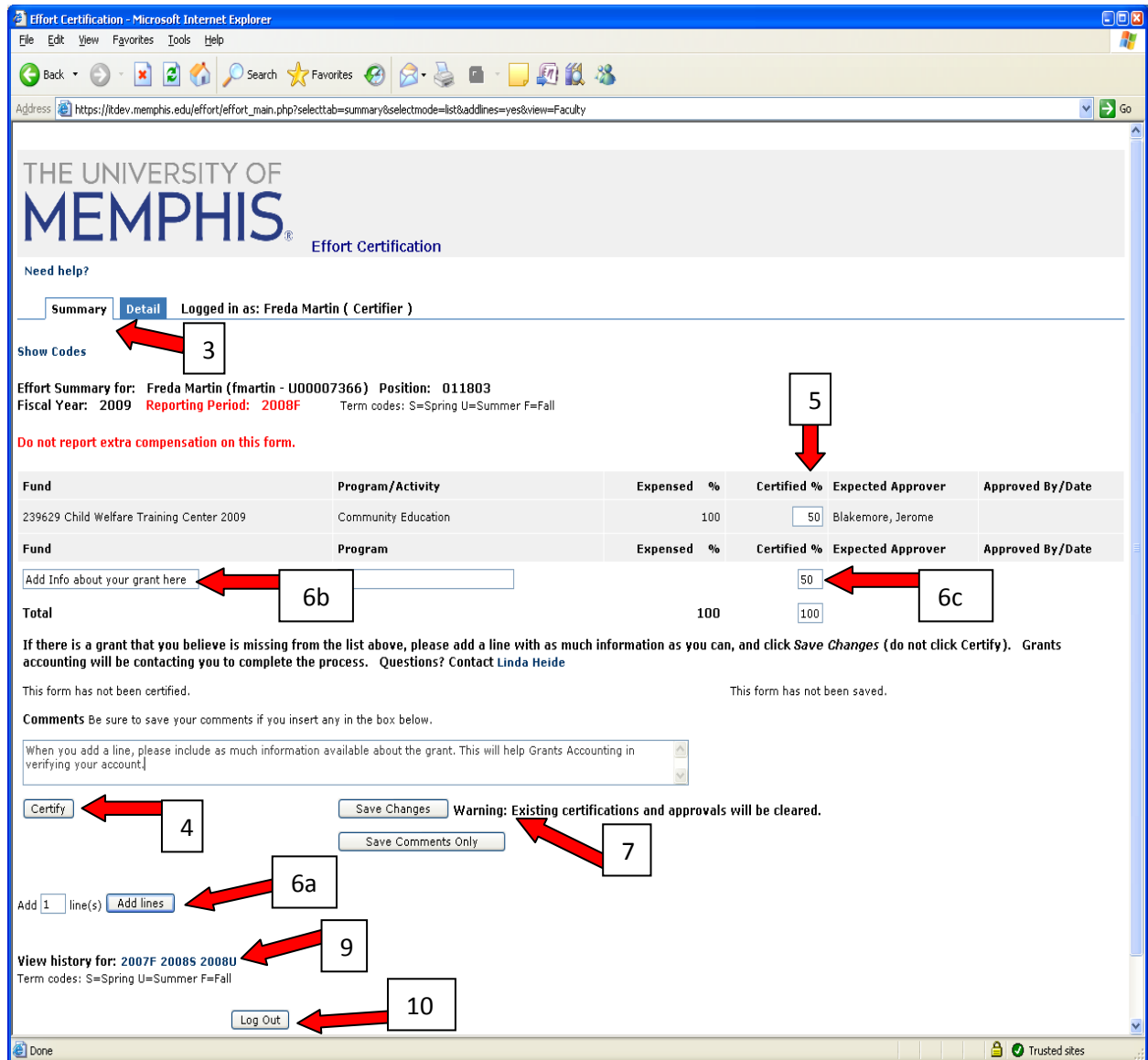
8. The **Expected Approver** (typically, the Principal Investigator) will receive an automatically generated email requesting their approval of your effort. No further action is required on your part unless so requested. If you are the **Expected Approver**, return to the effort form, and then click **Approve**.

9. To view a prior period effort form, click on the appropriate "View history for:" link.

10. Logout of the system by clicking on **Log Out**.

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THE UNIVERSITY OF MEMPHIS Effort Certification

Need help?

Summary **Detail** Logged in as: Freda Martin (Certifier)

Show Codes **3**

Effort Summary for: Freda Martin (fmartin - U00007366) Position: 011803
 Fiscal Year: 2009 Reporting Period: 2008F Term codes: S=Spring U=Summer F=Fall

Do not report extra compensation on this form.

Fund	Program/Activity	Expensed %	Certified %	Expected Approver	Approved By/Date
239629 Child Welfare Training Center 2009	Community Education	100	<input type="text" value="50"/> 5	Blakemore, Jerome	
Fund	Program	Expensed %	Certified %	Expected Approver	Approved By/Date
<input type="text" value="Add Info about your grant here"/> 6b			<input type="text" value="50"/> 6c		
Total		100	<input type="text" value="100"/>		

If there is a grant that you believe is missing from the list above, please add a line with as much information as you can, and click **Save Changes** (do not click **Certify**). Grants accounting will be contacting you to complete the process. Questions? Contact Linda Heide

This form has not been certified. This form has not been saved.

Comments Be sure to save your comments if you insert any in the box below.

When you add a line, please include as much information available about the grant. This will help Grants Accounting in verifying your account.

4 **Warning: Existing certifications and approvals will be cleared.** **7**

Add line(s) **6a**

View history for: 2007F 2008S 2008U **9**
 Term codes: S=Spring U=Summer F=Fall

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Go to <http://bf.memphis.edu/finance/accounting/effort.php> for additional information and assistance.