PERT Department Representative's Effort Review Checklist

o Identify all employees in your area for whom an effort report should exist for the reporting period (employees paid from federally funded projects or provided committed cost sharing to sponsored projects, includes No Cost Extensions).

o Verify that all employees identified above have an effort report in the system for the reporting period.

- **Best Practice**: Run Query: U_ER_ADMIN_REVIEW to ensure all required effort reports have been generated.

o Review each effort report for accuracy (Account Details info vs. current pending pay history).

o Verify that appropriate payroll percent was charged to the appropriate accounts.

o Verify that all committed cost sharing is represented.

o Notify Sponsored Research Post Award of new cost share commitments not reflected in PERT **and submit retroactive pay distributions (RETs) to redistribute salary charges to the appropriate** combination code(s) as needed.

o Enter comments/explanations for all changes.

o Verify all allowable certifiers are correctly identified on the effort report's Allowable Certifier page as needed.

- **OPS- PI/Co-PI** common to all projects is listed on the report; supervisor listed on the Job Data for the associated Emp Rcd#; Department Head or Chair.

- **Terminated non-OPS** - PI/Co-PI common to all projects is listed on the report; supervisor listed on the Job Data for the associated Emp Rcd#; Department Head or Chair.

  o Notify Certifiers when you have completed your review and/or adjustments to their effort report(s) by,

  o Clicking on the email button on the effort report via the Admin Review page to notify that employee if they are the certifier or

  o Navigating to the Effort Certify page, open the effort report for the employee you wish to notify and use "Notify" feature at the bottom of the page to send your message to all parties as needed. This will send a link in an email that the certifier can click to take him or her directly to the effort report once he or she is logged into the system.

  o Note: In order to use the Notify feature you must be on the certifier page and not the admin review page.
    - **Best Practice:** Use the DR Email Notification Templates -Certifier's Announcement

o Monitor the status of the reports for "Rejected" reports, adjust as appropriate and notify the certifier.

o Monitor the status of the reports to remind certifiers of their deadlines to certify.

  - **Best Practice**: Use the DR Email Notification Templates -Certifier's Announcement

o Prepare and submit all **retroactive payroll transfers (RETs). RETs are required for all Account Detail changes.** Refer to CCHIP #001 CCHIP #001 Timeline for Processing Cost Transfers on Sponsored Research Projects

  ▪ **Best Practice:** Use the Pay Distributions Worksheet to track submitted RETs:
    ▪ 9/2023