

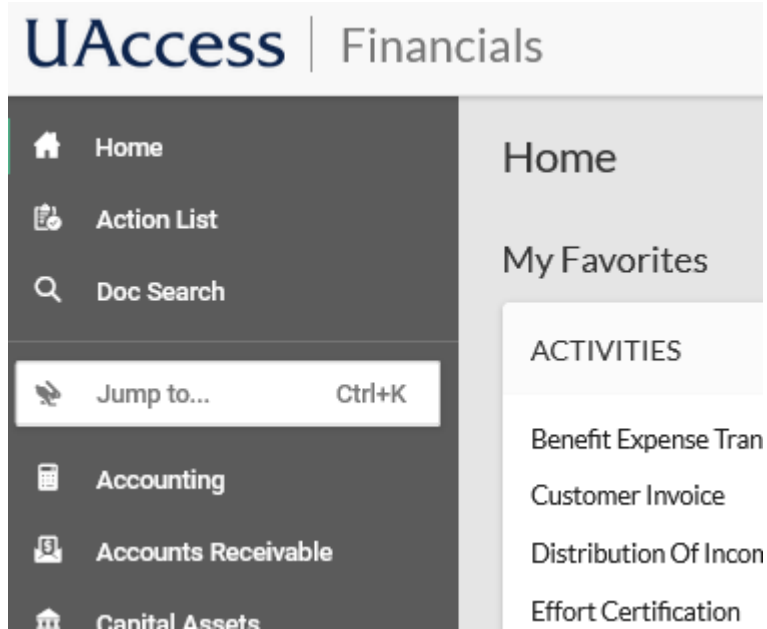
## UNIVERSITY OF ARIZONA - UACCESS FINANCIALS INSTRUCTIONS TO APPROVE EFFORT CERTIFICATION REPORTS

### Resources and Training:

- Research Gateway Effort Certification policy and procedures: <http://rgw.arizona.edu/administration/managing-projects/effort-reporting>
- Interactive training for using the electronic system. Please login using your UA NetID and password, and select the Effort Certification topic: <https://upktraining.uits.arizona.edu/odstrack/content/financials/toc0.html>

### User Guide for approving effort certifications

1. Use your internet browser to access UAccess Financials at: <https://financials.uaccess.arizona.edu/kfs/webapp/dashboard/home>
  - If you are off-campus you will need to use the UA VPN (<https://vpn.arizona.edu>) to login to UAccess Financials.
  - If you have difficulty logging in from off-campus or cannot use the VPN on your device, please contact your business officer and ask them to send you screenshots of the reports via email. You can then reply to your business officer stating you approve the reports. Your business officer will then contact Sponsored Projects to have the reports finalized.
2. Click on the button that says “Action List” on the top left corner of your screen



3. The system will prompt you to login with your UA NetID and password.

Enter your NetID and Password

NetID:

Password:

LOGIN clear

[Sign up for NetID+ for a second layer of security!](#)

Establish UA NetID authentication now to access protected services later.

Help & Resources

Create your NetID

- [Set your WebAuth Preferences](#)
- [Change/Reset your Password](#)
- [UITS WebAuth Help](#)

4. After logging in, you will be taken to your action list. We recommend you filtering your action list by selecting the “filter”

Action List

preferences refresh filter

Action List | Outbox






637 items retrieved, displaying 1 to 500.[First/Prev] 1, 2 [Next/Last]

Id	Type	Title	Route Status	Action Requested	Initiator	Delegator	D:
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5. In the action list filter select APPROVE in the Action Request then click the “filter” button.

### Action List Filter

Parameters

Document Title	<input type="text"/>	Exclude? <input type="checkbox"/>
Document Route Status	<div>All</div>	Exclude? <input type="checkbox"/>
Action Requested	<div>APPROVE</div>	Exclude? <input type="checkbox"/>
Action Requested Group	<div>NO Filtering</div>	Exclude? <input type="checkbox"/>
Document Type	<div> <input type="text"/></div>	Exclude? <input type="checkbox"/>
Date Created	<div>from: <input type="text"/> </div> <div>to: <input type="text"/> </div>	Exclude? <input type="checkbox"/>
Date Last Assigned	<div>from: <input type="text"/> </div> <div>to: <input type="text"/> </div>	Exclude? <input type="checkbox"/>

filter

clear

reset

cancel

then you find the Effort Certifications in your action list, click on the Document Id numbers (leftmost column) to open the individual reports.

[illegible]

6. You will see the effort report showing pay distributions for that individual. The top of the report shows the time period of the report. The principal investigator's name is next to each sponsored account. In the screenshot below, this report is for John Doe who worked on Wilbur Wildcat and Wilma Wildcat's sponsored accounts. If the distributions match the effort the individual worked for your account, please scroll down and click the approve button.
- If the distributions do not match what you expect to see - do not approve the report. Please instead contact your business officer for assistance to change the distributions on the report to match what was actually worked.
  - Please also ensure cost share effort is listed on the effort report.

\* required field

Document Overview

▼ hide

Document Overview

\* Description: John Doe Jan-June Base Pay

Org. Doc. #:

Explanation:

Report Information

▼ hide

Report Information

Employee Name John Doe

\* Report Number 2014-B02

Report Start Date 01/01/2014

Report End Date 06/30/2014

Effort Summary

▼ hide

Add New Detail Line

add:

\* Chart

\* Account Number

Sub-Account

Effort

Salary

Actions

Federal and Federal Pass Through Accounts

	* Chart	* Account Number	Sub-Account	Original Effort	Effort	Original Salary	Salary	Actions
1	UA University of Arizona-Management	30065 Research study... (Wilbur Wildcat)	-----	13% 13.0000%	13	17,253.17	17,253.17	recalculate revert
2	UA University of Arizona-Management	30065 Experiment Project A... (Wilma Wildcat)	CS001 Cost Share, Wilma 1122200	12% 12.0000%	12	15,926.01	15,926.01	recalculate revert
Subtotals:				25%	25%	33,179.18	33,179.18	

Other Sponsored and Non-sponsored Accounts

	* Chart	* Account Number	Sub-Account	Original Effort	Effort	Original Salary	Salary	Actions
1	UA University of Arizona-Management	11222 ENGR-AEROSP & MECH	-----	75% 75.0000%	75	99,537.47	99,537.47	recalculate revert
Subtotals:				75%	75%	99,537.47	99,537.47	

Grand Totals

Grand Totals:				100%	100%	132,716.65	132,716.65	
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Effort Detail

► show

Notes and Attachments (0)

► show

Ad Hoc Recipients

► show

Route Log

► show

calculate

send ad hoc request

reload

approve

close