

Effort Certification User Manual

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Revisions

Version 1.2 of this manual updated the following pages...

Pg 1: added earn codes SAB & SAP; effective SPR2014 will be included in effort calculations

What is Effort Certification?

Effort reporting is the process where an individual certifies that the salaries charged to sponsored projects are reasonable in relation to the actual work performed. The Federal guidelines 2 CFR Part 220, Cost Principles for Educational Institutions (OMB Circular A-21), require educational institutions that receive federal money to follow prescribed principles in determining the costs incurred for such work. NMSU supports the effort reporting requirements outlined in 2 CFR Part 220 (OMB Circular A-21) through an online effort certification process. The certification process is administered twice a year through the Banner Electronic Effort Certification application.

Business Rules

The following business rules will be followed in the Electronic Effort Certification Process.

Effort will only be certified for:

- Employees being paid on grants and/or contracts.
- Regular payroll based on the following earn codes:
 - REG – Regular Staff Earnings
 - RGA – Regular Academic Earnings
 - RGG – Graduate Student Earnings
 - RGO – Temporary Staff – Other
 - RGT – Temporary Staff Earnings
 - RSF – Regular Student Flat Rate
 - ASR – Adjustment – Special Rate
 - DFA – Deferred Amount
 - SAB – Sabbatical ½ Year Full Pay
 - SAP – Sabbatical Full Year 60% Pay
- Salaried Employees based on the following employee classes:
 - A1 – Faculty FT Reg – Academic
 - A2 – Faculty PT Reg – Academic
 - A3 – Faculty FT Temp – Academic
 - A4 – Faculty PT Temp – Academic
 - AD – Faculty FT Reg – Deferred Pay
 - B1 – Faculty Reg FT – Annual
 - B2 – Faculty Reg PT – Annual
 - B3 – Faculty FT Temp – Annual
 - B4 – Faculty PT Temp – Annual
 - B5 – Faculty FT Federal – Annual
 - C1 – Faculty FT – Other
 - C2 – Faculty PT – Other
 - E1 – Staff FT Reg – Exempt
 - E2 – Staff PT Reg – Exempt
 - E3 – Staff FT Temp – Exempt (as of FALL2013 no longer included; changed to timesheet employee)
 - E4 – Staff PT Temp – Exempt (as of FALL2013 no longer included; changed to timesheet employee)

- E5 – Staff FT Federal – Exempt
- SG – Graduate Assistant (RA/TA)
- PSL Employees will not certify effort but will enter time sheets in the Web Time System.
- Percentage of Effort charged to each fund for an employee should be verified.
 - Variances of 5% or more need to be corrected.
 - Corrections to Effort can only be made via the Electronic Labor Redistribution process or through the Payroll Department; effort reports cannot be modified in the Banner Electronic Effort Certification process.
- Effort certification will occur twice a year and will cover 6 months of effort.
- A Pre-Review period of one month will be utilized to allow the appropriate personnel to review and process Electronic Labor Redistribution transactions.
- The Pre-Review period will be followed by the Certification period of one month.
- Employees that meet the Effort Certification criteria will need to certify their effort, with the exception of Graduate Students. Graduate Students will be certified by the Fund Managers for the funds on which they are being paid.
- Once effort has been certified, the payroll records will be locked and Electronic Labor Redistributions cannot be processed.
- On the Fly queue members cannot be added to the Effort Certification queue.

Roles & Responsibilities

Pre-Reviewer: an individual responsible for reviewing effort reports and requesting changes prior to the certification process. Usually this role is held by the fund’s Research Administrators and/or Department Heads. Timely action by the pre-reviewers is critical to the effort certification process.

Acknowledger: an individual responsible for reviewing and acknowledging effort reports. Usually this role is held by the fund’s Principal Investigator and Fund Manager.

Certifier: any regular employee who charges a percentage of their time to grants and/or contracts. Effort reports for graduate students will be certified by the Fund Manager.

NMSU
SPA - Electronic Effort Reporting - Role Matrix
 June, 2012

	Pre-Review		Certification	← Stage
	Review	Acknowledge	Certify	← Action
Res Administrator	x			
Department Head	x			
PI		x		
Employee on restricted funding			x	
PI/Co-PI for graduate student			x	

Refer to **Appendix A** for instructions on identifying Principal Investigators, Pre-Reviewers, and Fund Managers using Banner forms.

Certification Timeline

Effort Certification occurs twice a year and covers 6 months of effort.

Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec
Spring Report Period											
							Spring Pre-Review				
								Spring Certification			
						Fall Report Period					
	Fall Pre-Review										
		Fall Certification									

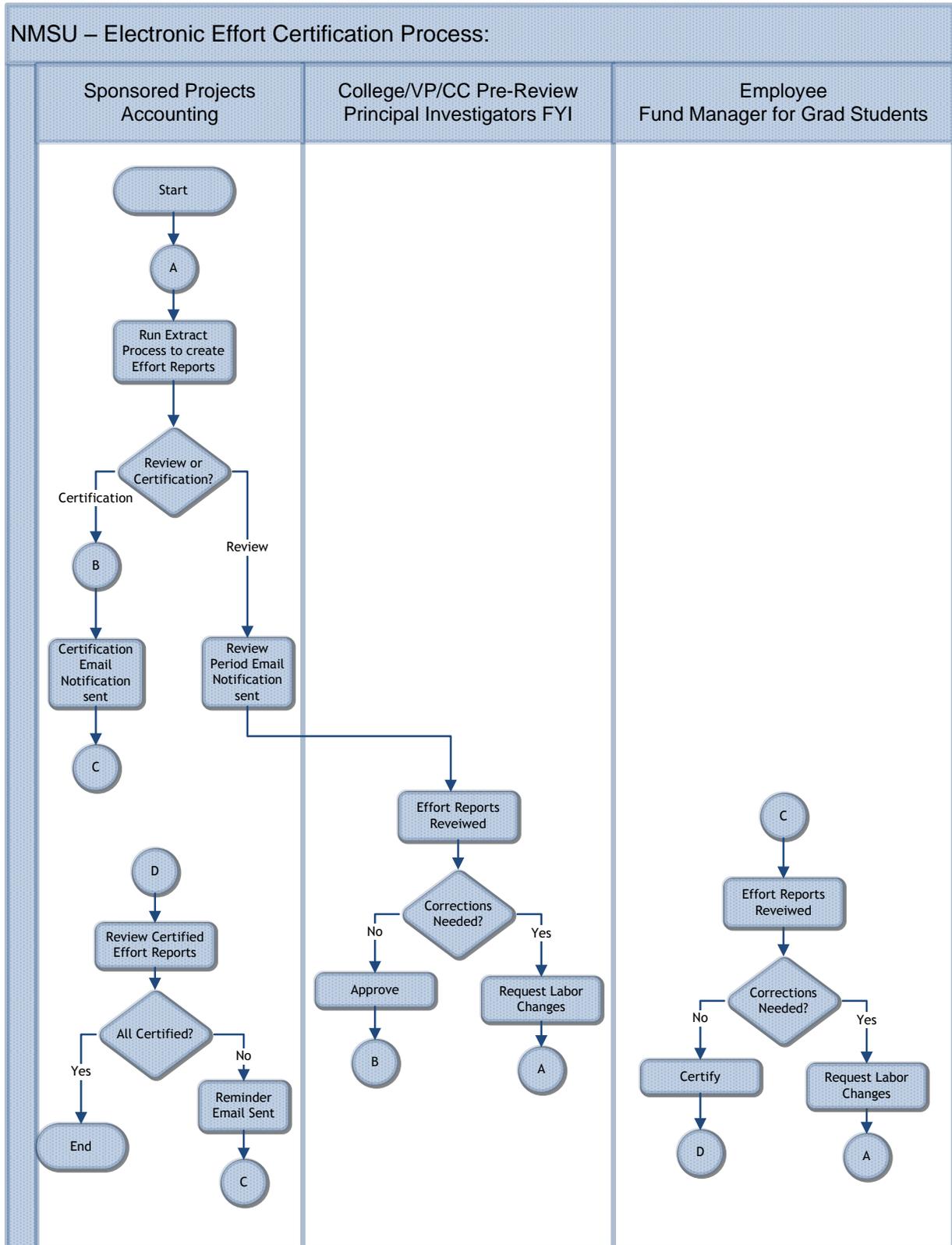
Email Notifications

Pre-Reviewers will be notified via email the 1st day of the pre-review period, every Tuesday thereafter, and every day during the last week of the pre-review period.

Acknowledgers will be notified via email the 1st day of the pre-review period only (PI's and Fund Managers).

Certifiers will be notified via email the 1st day of the certification period, every Tuesday thereafter, and every day during the last week of the certification period.

Process Flow



Logging on to Banner Self-Service

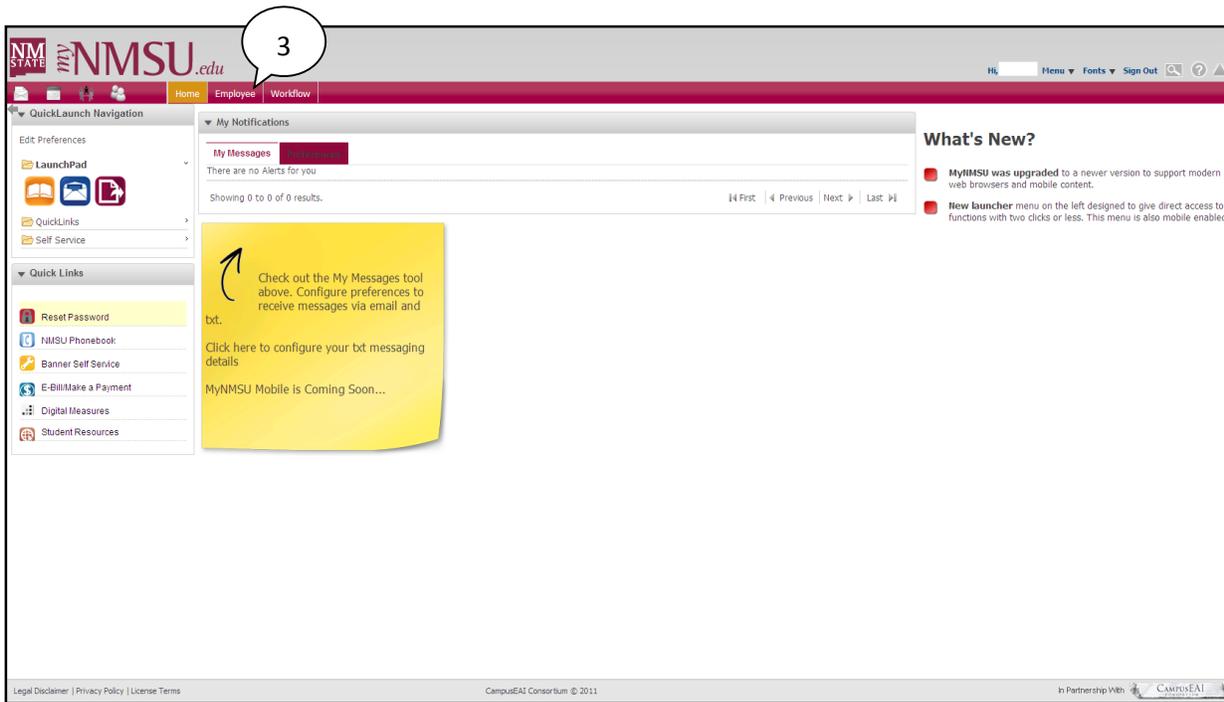
Banner Self-Service provides access to the Electronic Effort Certification.

1. Type <https://my.nmsu.edu> in the address bar of your web browser and press enter.
The myNMSU page will appear.

The screenshot shows the myNMSU website interface. At the top left is the NMSU logo. Below it is a navigation bar with 'Welcome' and 'Help' buttons. The main content area is divided into several sections. On the left, there is a 'Login' section with a red box around it and a speech bubble containing the number '2'. The login section includes fields for 'Login:' and 'Password:', a 'LOGIN' button, and links for 'Forgot Username?' and 'Forgot Password?'. Below the login section is a 'Create an account' button for new users. On the right, there is a 'Registration and Schedule Information' section with a sub-section 'Useful Links and Contact Information' containing links for 'Banner and Cognos and NMSU', 'INB Password Resets and account Unlock', 'Academic Calendar', 'ICT Help Desk', and 'Information about myNMSU and Email'. Below that is a 'Frequently Requested Help' section with links for 'Password Resets', 'Email: Settings, Devices and Troubleshooting', 'Connecting your Device to the NMSU Network', 'PC Maintenance', 'Virus - Software, Removal and Information', and 'Student Network Information'. At the bottom, there is a 'NEED ASSISTANCE?' section with contact information for the ICT Help Desk.

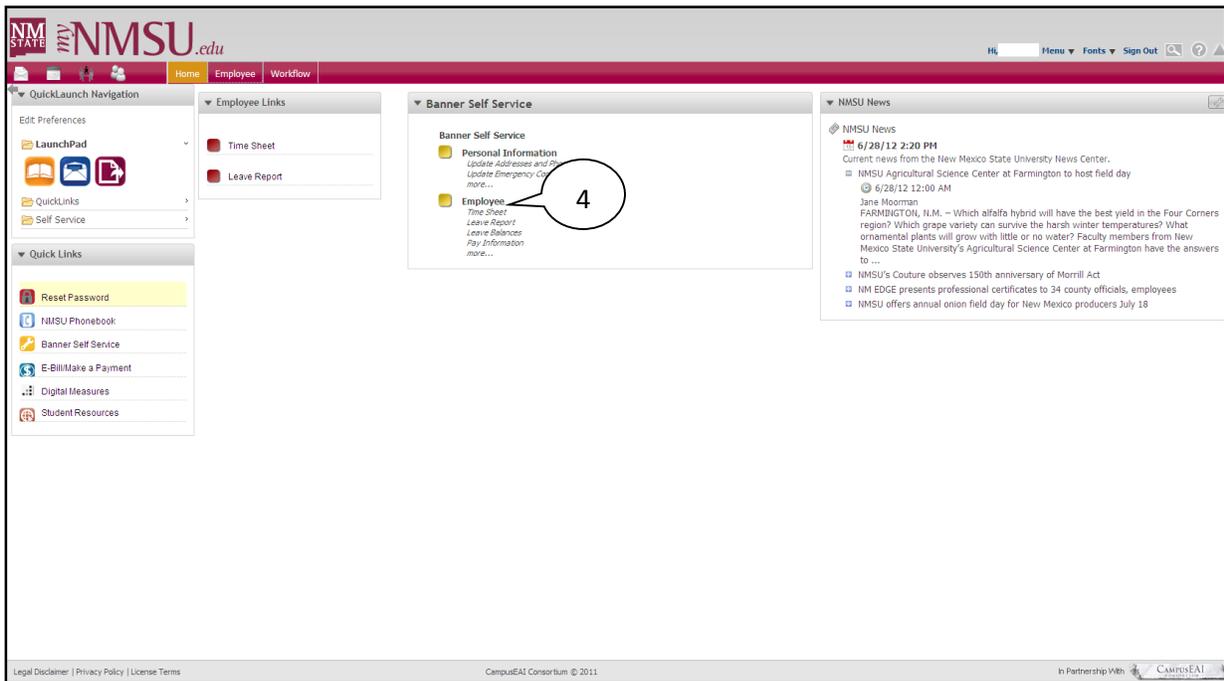
2. Enter **User Name** and **Password**.

The myNMSU home webpage will be displayed.



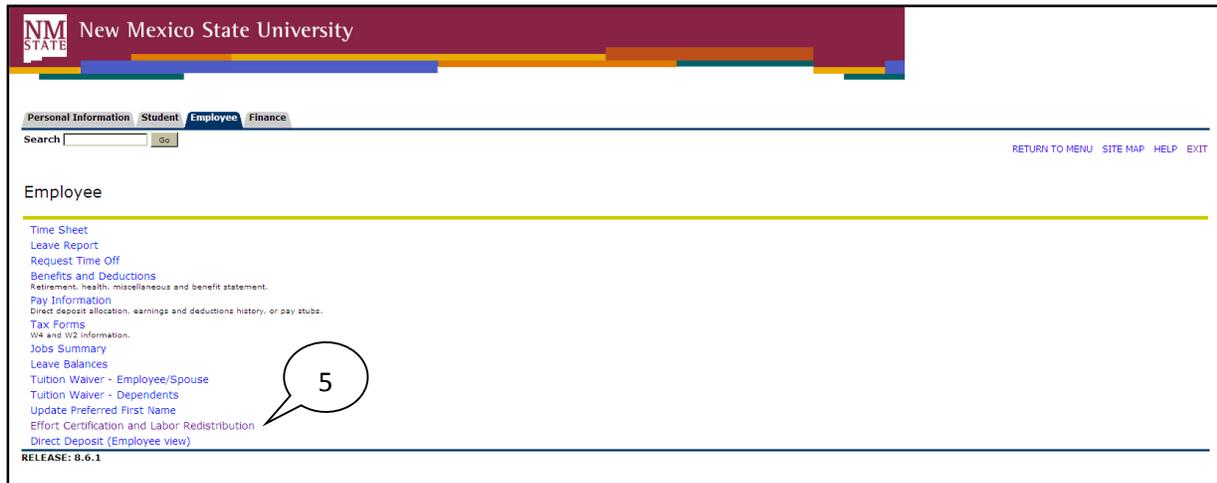
3. Click on the **Employee** Tab.

Employee tab information will be displayed.

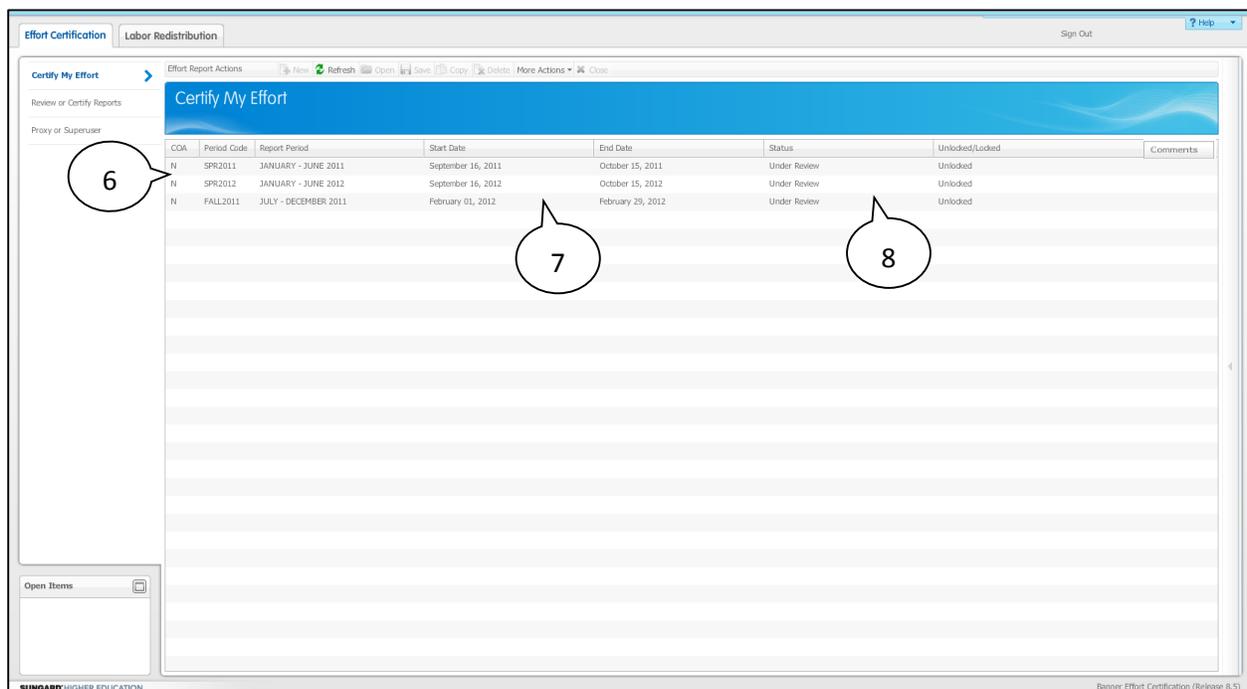


4. Click on the **Employee** link.

The Employee list options will be displayed.



- Click on the **Effort Certification and Labor Redistribution** link. The following screen will be displayed.

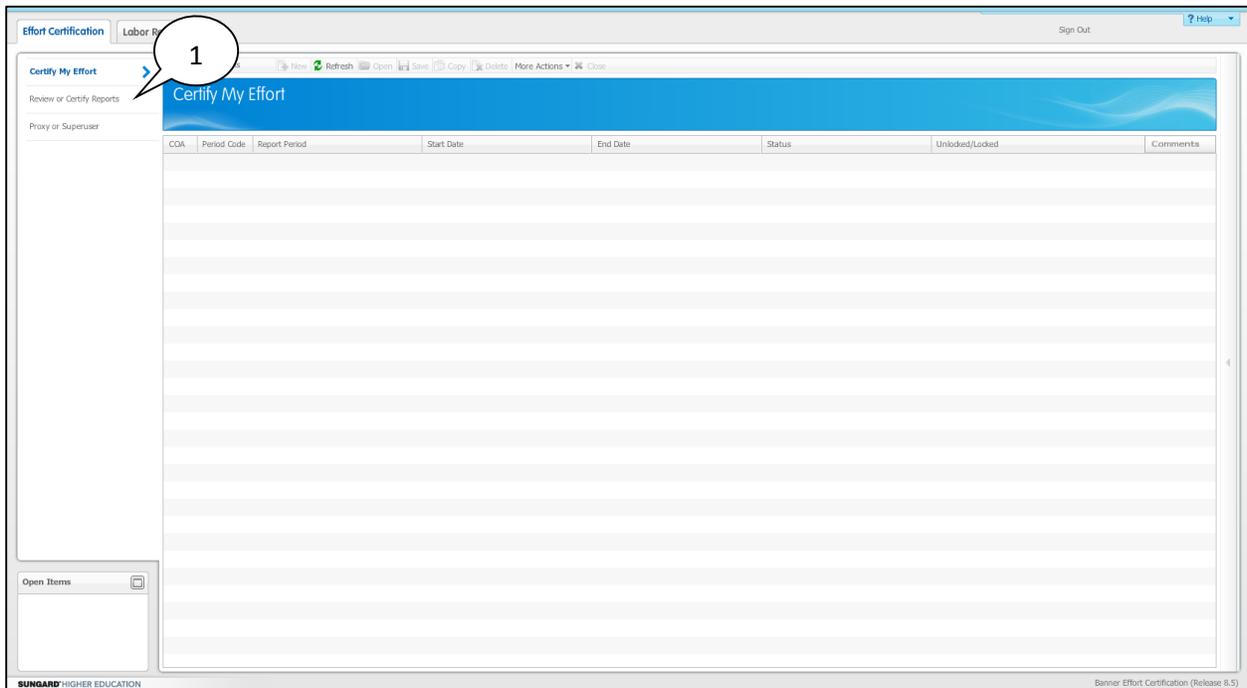


- Depending on your role and payroll allocations, you may/may not see data on the first screen – **Certify My Effort**. This screen shows your own time needing to be certified, if applicable.
- The **Start Date** and **End Date** are the certification period dates.
- The **Status** and **Unlocked/Locked** columns tell you the state the effort report is in.

- a. Under Review/Unlocked – this state is active when a report is waiting pre-review or certification. The payroll allocations can be adjusted with an electronic labor redistribution if necessary.
- b. Awaiting Update/Unlocked – this state is active after an electronic labor redistribution has been completed but the effort report has not been updated or reviewed.
- c. Completed/Locked – this state is active after the employee has certified the effort. No changes to payroll allocation for the effort period can be made.

Search for Employees to Review/Acknowledge

As a pre-reviewer or acknowledger, complete the following steps during the pre-review period to locate individuals who charge time to your grant/contract. The search procedure is not required when certifying your own effort.

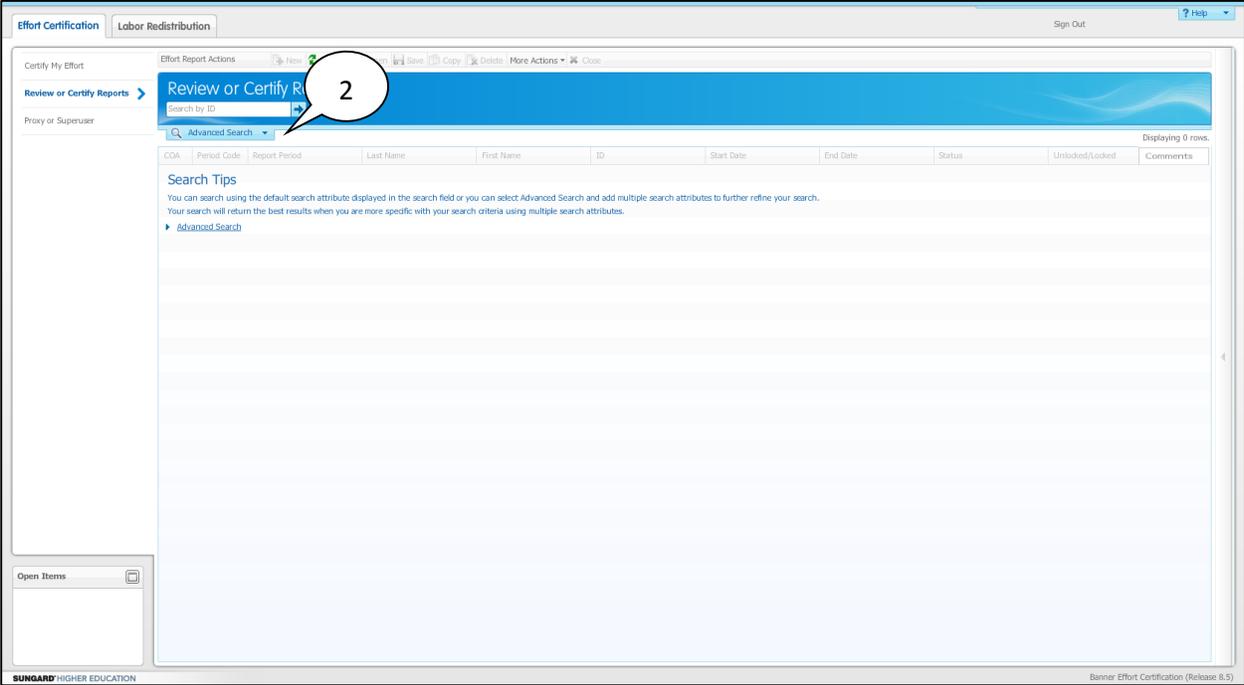


1. Click **Review or Certify Reports** from the left menu.

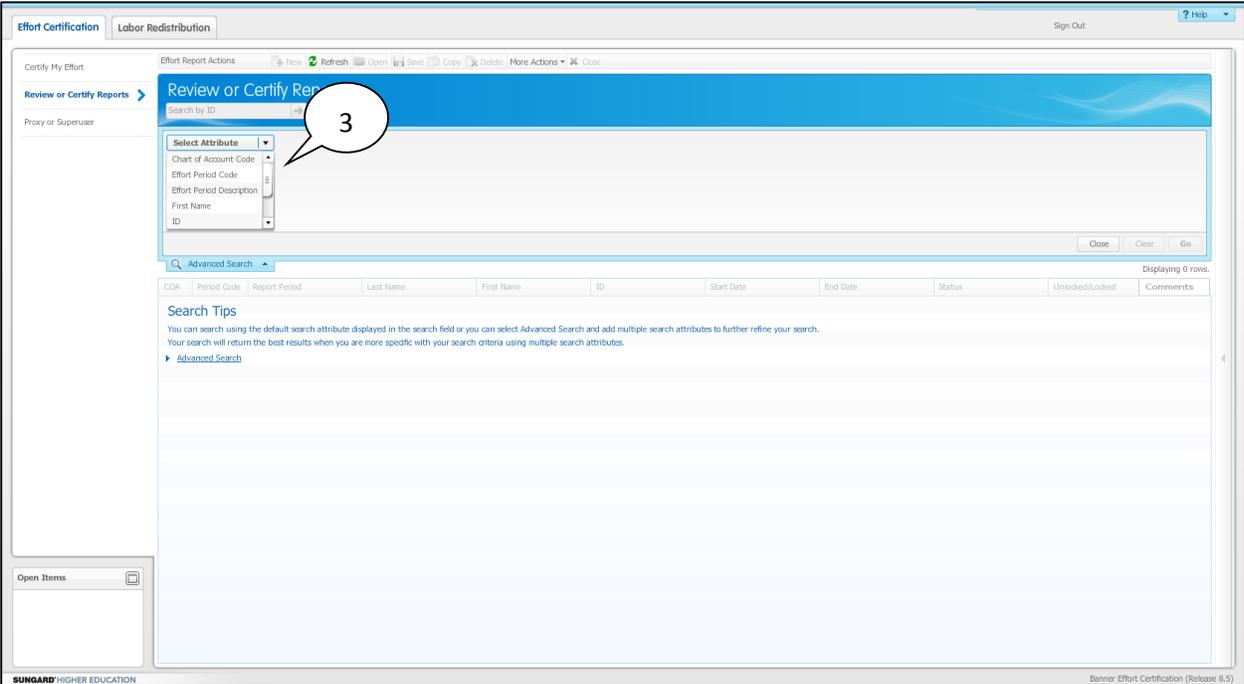
Employee effort reports can be found by entering their Aggie ID (Banner ID) or using additional search parameters to search by:

- Last and First Name: search criteria must include both names or at least the first three characters of each followed by an asterisk (*).

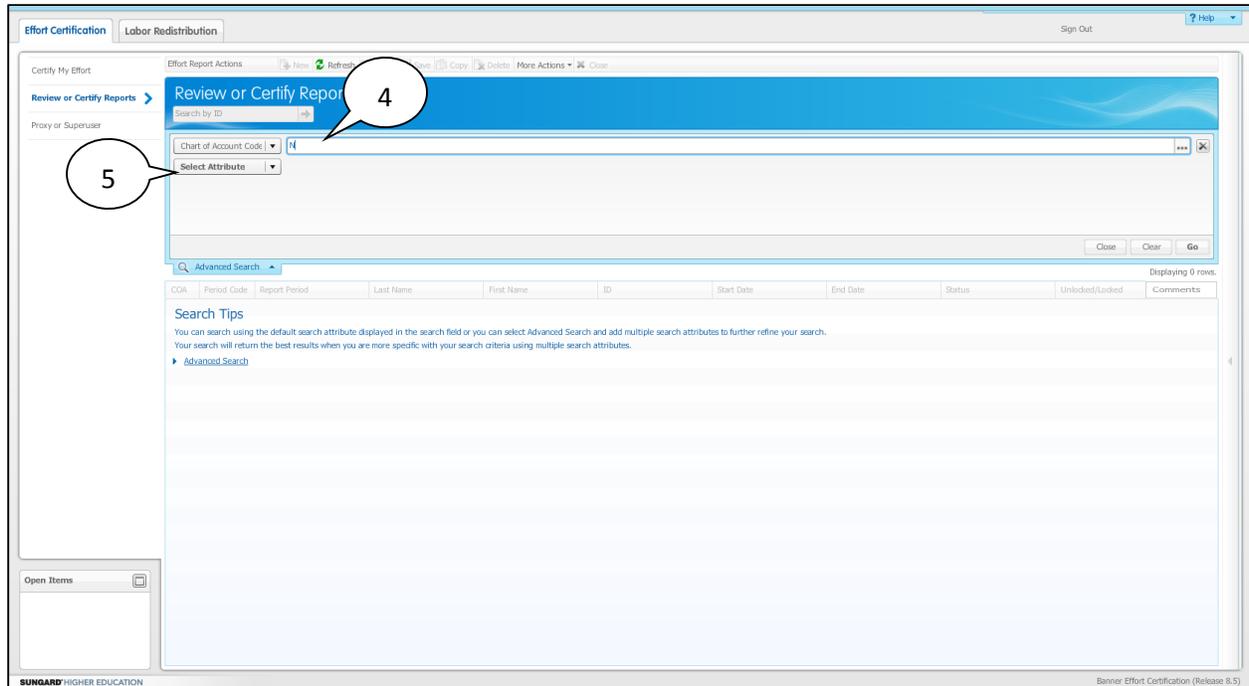
- Effort Period Code: search for all employees for an effort period. Use of this search attribution also requires the attribute Chart of Accounts="n".
 - Note: This is the search option displayed in the instructions that follow.



2. Click **Advanced Search**.



3. Click **Select Attribute** and Select **Chart of Account** from drop-down list.

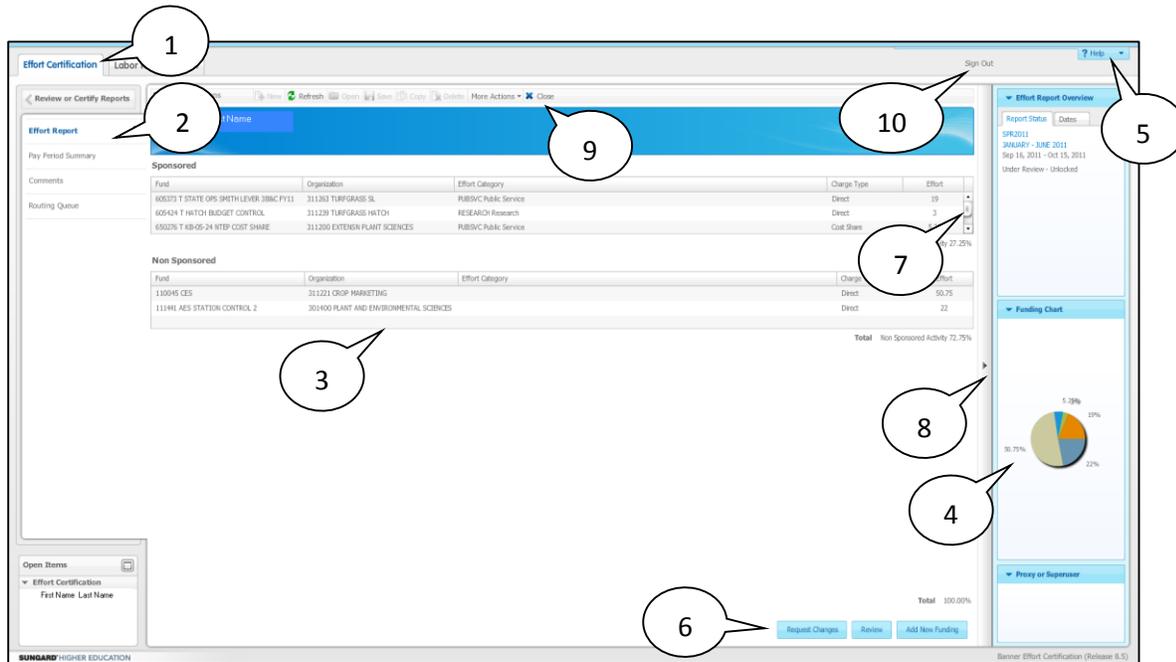


4. Enter "N" in the Chart of Accounts attribute field (N=NMSU)
5. Click **Select Attribute** again and select **Effort Period Code** from drop down list

The screenshot shows the 'Review or Certify Reports' interface. At the top, there are tabs for 'Effort Certification' and 'Labor Redistribution'. Below the tabs, there are search filters: 'Chart of Account Code' (set to 'H'), 'Effort Period Code' (set to 'SPR2011'), and 'Select Attribute'. A search bar with a 'Go' button is located at the bottom right of the search form. Below the search form, there is a table with the following columns: CGA, Period Code, Report Period, Last Name, First Name, ID, Start Date, End Date, Status, and Unlocked. A 'Search Tips' section is also visible, providing instructions on how to use the search functionality. Callout boxes labeled '6' and '7' highlight the 'Effort Period Code' field and the 'Go' button respectively.

6. Enter the **effort period code** in the attribute field.
 - a. The Selector Button  can be used to view a list of values available for selection.
 - b. For the period of January – June, the effort period code is “**SPRyyyy**” where “yyyy” is the Year being reviewed.
 - c. For the period of July – December, the effort period code is “**FALLyyyy**” where “yyyy” is the Year being reviewed.
7. Click **Go** to perform the search.

The Effort Report



The Effort Certification window is divided into three main parts – The navigation pane on the left, the main workspace in the center, and the sidebar on the right. The numbers on the window above correspond to the descriptions in the following table.

#	Item	Description
1	Tabs (also known as Modules)	The main tabs at the top of the workspace allow you to access different types of information. The Effort Certification tab allows you to access the Effort Certification module.
2	Links	The left navigation pane contains a series of navigational links.
3	Main Workspace	This is the main workspace window. A summary of the report period allocations between Sponsored and Non-Sponsored and the various funds charged can be viewed.
4	Right Sidebar	Contains an Effort Report Overview showing the report status and dates for review & certification; a funding chart; and role of the user if logged in as a proxy or superuser.
5	Help	Contains system help for the current open view.
6	Buttons	Context-specific buttons can appear below the main workspace window if applicable.
7	Scroll bars	If more information is available than can be displayed in the workspace window, horizontal and/or vertical scroll bars are available.
8	Expansion Bar	The arrow on the expansion bar feature allows you to open or close the sidebar when you would like to view the main workspace window in a larger view.
9	Close Button	The close button closes the current effort report and returns the user to the Search Results page.
10	Sign Out	The sign out button is used to log out of the system. Failure to sign out properly may result in all effort reports being locked from other users.

Reviewing the Effort Report

Effort reports are based on actual payroll. The system will take into account Electronic Labor Redistributions prior to and during the Electronic Effort Certification process. The percentage of effort is determined by taking the six month payroll and averaging this payroll by funding types. The pre-reviewer will need to work with their principal investigators and/or fund managers to determine if the reported percentages are correct.

The screenshot displays the 'Effort Certification' interface. On the left, a navigation pane has a callout '2' pointing to the 'Pay Period Summary' link. The main area shows a table of effort allocations. A callout '1' points to the 'Total' row of the 'Non Sponsored' section. On the right, a 'Funding Chart' pie chart shows the distribution: 5.25% (Sponsored), 19% (Direct), 22% (Cost Share), and 53.75% (Non Sponsored).

Fund	Organization	Effort Category	Charge Type	Effort
605373 T-STATE OPS SMITH LEVER 388C FY11	311263 TURFGRASS SL	PUBSVC Public Service	Direct	19
605424 T HATCH BUDGET CONTROL	311229 TURFGRASS HATCH	RESEARCH Research	Direct	3
650276 T KB-05-24 NTEP COST SHARE	311200 EXTENSI PLANT SCIENCES	PUBSVC Public Service	Cost Share	5.25
Total				Sponsored Activity 27.25%
Fund	Organization	Effort Category	Charge Type	Effort
110045 CES	311221 CROP MARKETING			50.75
111491 AES STATION CONTROL 2	301400 PLANT AND ENVIRONMENTAL SCIENCES			22
Total				Non Sponsored Activity 72.75%
Total				100.00%

1. Review the summary effort report. Variances of 5% or greater need to be corrected on an Electronic Labor Redistribution.
2. To view the allocations by pay period, click on the **Pay Period Summary** link in the left navigation pane.

The screenshot shows the Banner Effort Certification (Release 8.5) interface. The main window displays a 'Pay Period Summary' for the reporting period from January 01, 2011, to January 15, 2011. The table lists allocations for five semi-monthly periods. Callout 3 points to the 'Effort Period Percent' column, and callout 4 points to the 'Organization' column. On the right, there is an 'Effort Report Overview' panel with a 'Funding Chart' pie chart showing 90.75%, 5.25%, and 22%.

Organization	Grant	Fund	Effort Type	Payroll Percent	Effort Period Percent
301400 PLANT AND ENVIRONMENTAL		111441 AES STATION CONTROL 2		22.0001	1.8333
311221 CROP MARKETING		110045 CES		56.0001	4.6667
311239 TURFGRASS HATCH	GR0003434 HATCH FED APPROP FY 11	605424 T HATCH BUDGET CONTROL	RESEARCH Research	2.9999	0.25
311263 TURFGRASS SL	GR0003426 2011-41100-03100	605373 T STATE OPS SMITH LEVER 3I	PUBSVC Public Service	18.9999	1.5833

The **Pay Period Summary** shows the allocations made during each pay period of the reporting period.

3. Use the **Scroll Bar** to view all the pay periods.
4. Click on the **Pay Period Link** to view additional details about the pay period allocations including **Position number, Earn Code, Shift, Index number, and FOAPAL** details.
 - a. Note: in accordance with Federal guidelines 2 CFR Part 220 (OMB Circular A-21), only percentages are reported on effort reports. Cognos report "HR-LD-278B Labor Expense Detail".

The screenshot shows a detailed view of the 'Pay Period Semi-Monthly Current 1 2011'. The table lists allocation details including Sequence, Position, Effective Date, Earning Code, Shift, COA, Index, Fund, Organization, Account, Program, Activity, Location, and Percent.

Sequence	Position an	Effective D	Earning Co	Shift	COA	Index	Fund	Organizati	Account	Program	Activity	Location	Percent
0	719824 - 0	November	REG Regul	1	N	117961 TU	605424 T H	311239 TU	614100 EXI	1600 RESE	229042 AR		3
0	719824 - 0	November	REG Regul	1	N	101607 01	110045 CE	311221 CR	614100 EXI	1700 PUBL			56
0	719824 - 0	November	REG Regul	1	N	117785 TU	605373 T S	311263 TU	614100 EXI	1700 PUBL	230097 AR		19
0	719824 - 0	November	REG Regul	1	N	115539 TU	111441 AE	301400 PL	614100 EXI	1600 RESE	217100 TU		22

5

Effort Report

Monthly Current 1 2011 January 01, 2011 - January 15, 2011

Organization	Grant	Fund	Effort Type	Payroll Percent	Effort Period Percent
301400 PLANT AND ENVIRONMENTAL		111441 AES STATION CONTROL 2		22.0001	1.8333
311221 CROP MARKETING		110045 CES		56.0001	4.6667
311239 TURFGRASS HATCH	GR0003434 HATCH FED APPROP FY 11	605424 T HATCH BUDGET CONTROL	RESEARCH Research	2.9999	0.25
311263 TURFGRASS SL	GR0003426 2011-41100-03100	605373 T STATE OPS SMITH LEVER 3I	PUBSVC Public Service	18.9999	1.5833

Semi-Monthly Current 2 2011 January 16, 2011 - January 31, 2011

Organization	Grant	Fund	Effort Type	Payroll Percent	Effort Period Percent
311221 CROP MARKETING		110045 CES		56.0001	4.6667
311239 TURFGRASS HATCH	GR0003434 HATCH FED APPROP FY 11	605424 T HATCH BUDGET CONTROL	RESEARCH Research	2.9999	0.25
311263 TURFGRASS SL	GR0003426 2011-41100-03100	605373 T STATE OPS SMITH LEVER 3I	PUBSVC Public Service	18.9999	1.5833
301400 PLANT AND ENVIRONMENTAL		111441 AES STATION CONTROL 2		22.0001	1.8333

Semi-Monthly Current 3 2011 February 01, 2011 - February 15, 2011

Organization	Grant	Fund	Effort Type	Payroll Percent	Effort Period Percent
301400 PLANT AND ENVIRONMENTAL		111441 AES STATION CONTROL 2		22.0001	1.8333
311239 TURFGRASS HATCH	GR0003434 HATCH FED APPROP FY 11	605424 T HATCH BUDGET CONTROL	RESEARCH Research	2.9999	0.25
311263 TURFGRASS SL	GR0003426 2011-41100-03100	605373 T STATE OPS SMITH LEVER 3I	PUBSVC Public Service	18.9999	1.5833
311221 CROP MARKETING		110045 CES		56.0001	4.6667

Semi-Monthly Current 4 2011 February 16, 2011 - February 28, 2011

Organization	Grant	Fund	Effort Type	Payroll Percent	Effort Period Percent
311263 TURFGRASS SL	GR0003426 2011-41100-03100	605373 T STATE OPS SMITH LEVER 3I	PUBSVC Public Service	18.9999	1.5833
311239 TURFGRASS HATCH	GR0003434 HATCH FED APPROP FY 11	605424 T HATCH BUDGET CONTROL	RESEARCH Research	2.9999	0.25
311221 CROP MARKETING		110045 CES		56.0001	4.6667
301400 PLANT AND ENVIRONMENTAL		111441 AES STATION CONTROL 2		22.0001	1.8333

Semi-Monthly Current 5 2011 March 01, 2011 - March 15, 2011

Organization	Grant	Fund	Effort Type	Payroll Percent	Effort Period Percent
311200 EXTENSN PLANT SCIENCES	GR0001060 KB-05-24 NTEP	650276 T KB-05-24 NTEP COST SHAR	PUBSVC Public Service	7	0.5833
311221 CROP MARKETING		110045 CES		49	4.0833
311263 TURFGRASS SL	GR0003426 2011-41100-03100	605373 T STATE OPS SMITH LEVER 3I	PUBSVC Public Service	18.9999	1.5833

Effort Report Overview

Report Status: Under Review - Unlocked

Funding Chart

Proxy or Supervisor

- Click the **Effort Report** link in the left navigation pane to return to the effort report summary page.

Effort Report Overview

Report Status: Details

SPR2011
 JANUARY - JUNE 2011
 Sep 16, 2011 - Oct 15, 2011
 Under Review - Unlocked

Funding Chart

5.25%
 19%
 90.75%
 22%

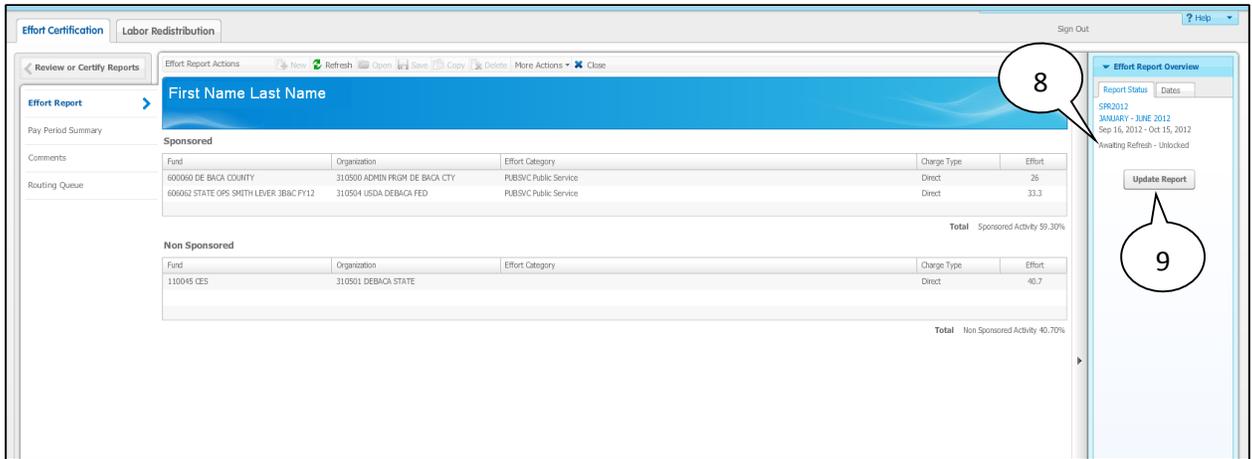
Request Changes **Review** **Add New Funding**

Total 100.00%

6. During your review, if you have identified changes that need to be made, an Electronic Labor Redistribution needs to be initiated. The **Request Changes** button opens a mail message that can be sent to the appropriate ELR initiator. However, this button does not populate any information besides the email subject line. Once this option has been selected, the report is no longer accessible to individuals in the routing queue until the record has been changed via an Electronic Labor Redistribution or the requester releases the record with the **Clear Changes** button (this button will appear after the request changes button has been selected even if the email is not sent).

Clear Changes

7. The **Add New Funding** button is not used at NMSU.



8. Following the completion of any necessary Electronic Labor Redistributions, the **Report Status** will be “Awaiting Refresh – Unlocked”.
9. Click the **Update Report** button to update the redistribution and review new percentages.

10. Once satisfied that the effort report is complete and accurate, click the button to complete the effort report. The name of this button will vary depending on your role.
- a. Review – available to pre-reviewers
 - b. Acknowledge – available to acknowledgers
 - c. Certify – available to certifiers
 - i. Certifiers will receive a pop-up certification statement and must click **I Agree** button.

? Certify

I HEREBY CERTIFY TO THE BEST OF MY KNOWLEDGE AND BELIEF THAT THE INDIVIDUAL NAMED IN THE EFFORT REPORT, PERFORMED WORK AS NOTED AND THAT THE PERCENTAGES OF EFFORT REFLECT A REASONABLE ESTIMATE OF WORK PERFORMED DURING THE STATED PERIOD.

Team Tip:

Comments are not required for the effort certification process. Appendix B contains instructions for adding comments if necessary.

The screenshot shows the Banner Effort Certification interface. At the top, there are tabs for 'Effort Certification' and 'Labor Redistribution'. A toolbar contains various actions like 'New', 'Refresh', 'Open', 'Save', 'Copy', 'Delete', and 'More Actions'. A 'Close' button is highlighted with callout 13. In the top right, a 'Sign Out' button is highlighted with callout 14. The main area displays an 'Effort Report' for a user named 'First Name Last Name'. It is divided into 'Sponsored' and 'Non Sponsored' sections, each with a table of activity. A 'Total' row shows 'Sponsored Activity 27.25%' and 'Non Sponsored Activity 72.75%'. On the right, an 'Effort Report Overview' panel shows the report status as 'Awaiting Certification - Unlocked' (callout 12) and a 'Funding Chart' pie chart. At the bottom right, 'Request Changes' and 'Add New Funding' buttons are highlighted with callout 11. An 'Open Items' panel is visible in the bottom left.

11. After the effort report is complete, the **Review/Acknowledge/Certify** button will disappear and
12. The report status will change
 - a. to **“Awaiting Certification – Unlocked”** if completed by pre-reviewer or acknowledger
 - b. to **“Completed – Locked”** if completed by certifier
13. Click the **Close** button to close the effort report (pre-reviewers/acknowledgers).
14. Click **Sign Out**.

Appendix A: Helpful Cognos Reports

The following Cognos Reports may be helpful to you in completing the Effort Certification process.

EEC Effort Report – Summary of Effort for the selected Employee and Effort Certification Period; similar to the Effort Report in the Electronic Effort Certification system.

EEC Pay Period Summary Report – Summary of Effort by pay period for the selected Employee and Effort Certification Period; similar to the Pay Period Summary page in the Electronic Effort Certification system.

EEC Tracking Report – Report to monitor the progress of the Effort Certification process. The report will give a list of Effort Certification reports along with the state and status of each report.

EEC Effort Certification Required – List of Effort Certification Reports which require Pre-Review approval or Certification by the individual receiving the report. Report will be emailed to the Pre Reviewers every Tuesday of the first 3 weeks of the pre review period and every day of the final week. Report will be emailed to the Certifiers every Tuesday of the first 3 weeks of the certification period and every day of the final week (note: this report is not viewable in Cognos but only available via email).

HR-LD-287B Labor Expense Detail – Displays detail payroll labor and fringe expense in addition to each pay period dollar amount.

Appendix B: Identifying Roles using Banner Forms

Not sure who the Fund Manager or Principal Investigator is for the funds on your effort report? The following Banner forms can be used to identify individuals with responsibility for restricted funds. For access to these reports, you will need appropriate Banner security access or may need to seek assistance from your Research Center for this information.

FRAGRNT

Using Banner form FRAGRNT, you can find the name and email address for a grant's Principal (primary) Investigator, Fiscal Monitor, EEC Pre-Reviewer, and/or Contract Administrator/Manager.

The screenshot shows the Banner FRAGRNT form in a web browser. The browser title is "Grant Maintenance FRAGRNT 8.8.1.5 (UBAN)". The form has several tabs: Main, Grant Agency, Location, Cost Code, Personnel, Billing, User Defined Data, and Effort Reporting. The Personnel tab is selected. The form contains the following fields and values:

- Grant:** GR0003209 (Callout 1)
- Sal:** 20892 (Callout 2)
- ID:** 8000 xxxxx (Callout 3)
- Indicator:** 001 Primary Investigator (Callout 3)
- Chart of Accounts:** N
- Organization:** 300001 AGRICULTURE AND HOME ECON COLLEC
- Salutation:** (empty)
- Title:** (empty)
- Address Type:** (empty)
- Address Sequence Number:** (empty)
- Phone Type:** (empty)
- Phone Sequence Number:** (empty)
- E-mail:** email @nmsu.edu (Callout 3)
- Billing or Report Format:** (empty)
- Full Time Equivalency:** (empty)
- Employee:** Yes (Callout 3)

Callout 4 points to the vertical scroll bar on the right side of the form.

1. Open form FRAGRNT and enter the **Grant number**. Click the **Next Block**  icon.
2. Click on the **Personnel** tab.
3. The **Primary (Principal) Investigator** name, id, and email will be displayed.
4. Use the **scroll bar** on the right to view other personnel assigned.
 - a. Indicator 001: Principal Investigator
 - b. Indicator 002: Fiscal Monitor
 - c. Indicator 003: EEC Pre-Reviewer (Department Head)
 - d. Indicator 004: EEC Administrator (Research Administrator)

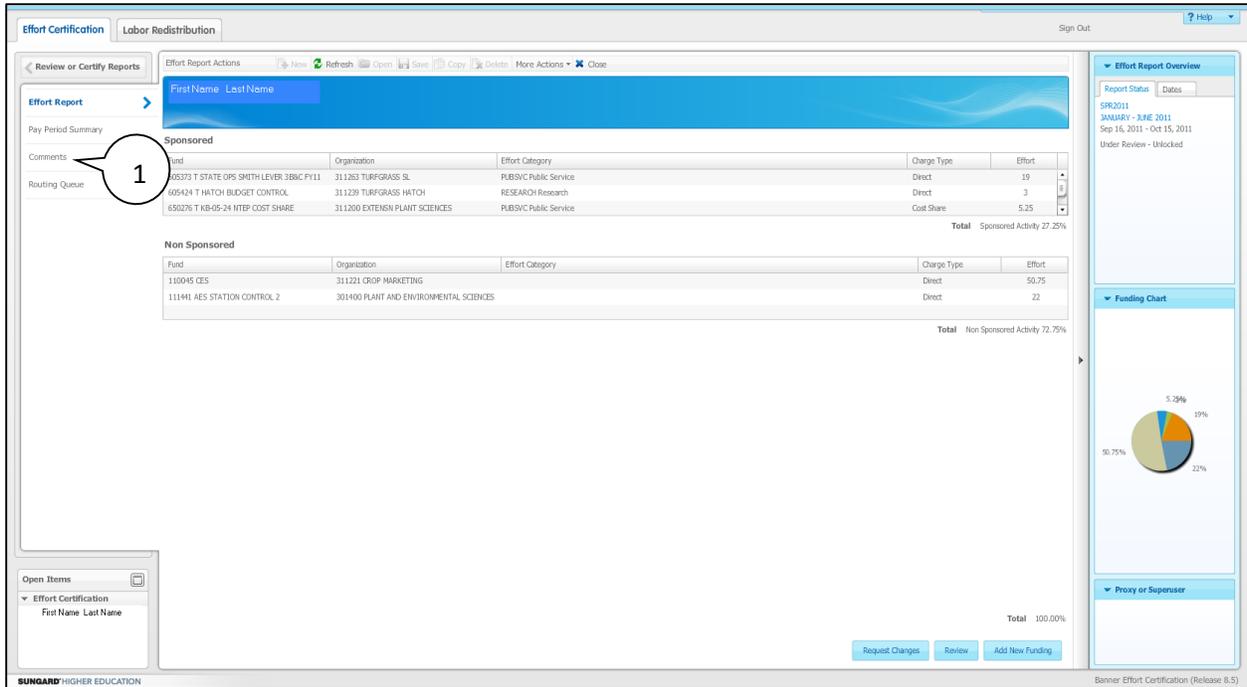
FTMFUND

Using Banner form FTMFUND, you can find the name of the Fund Manager for a grant.

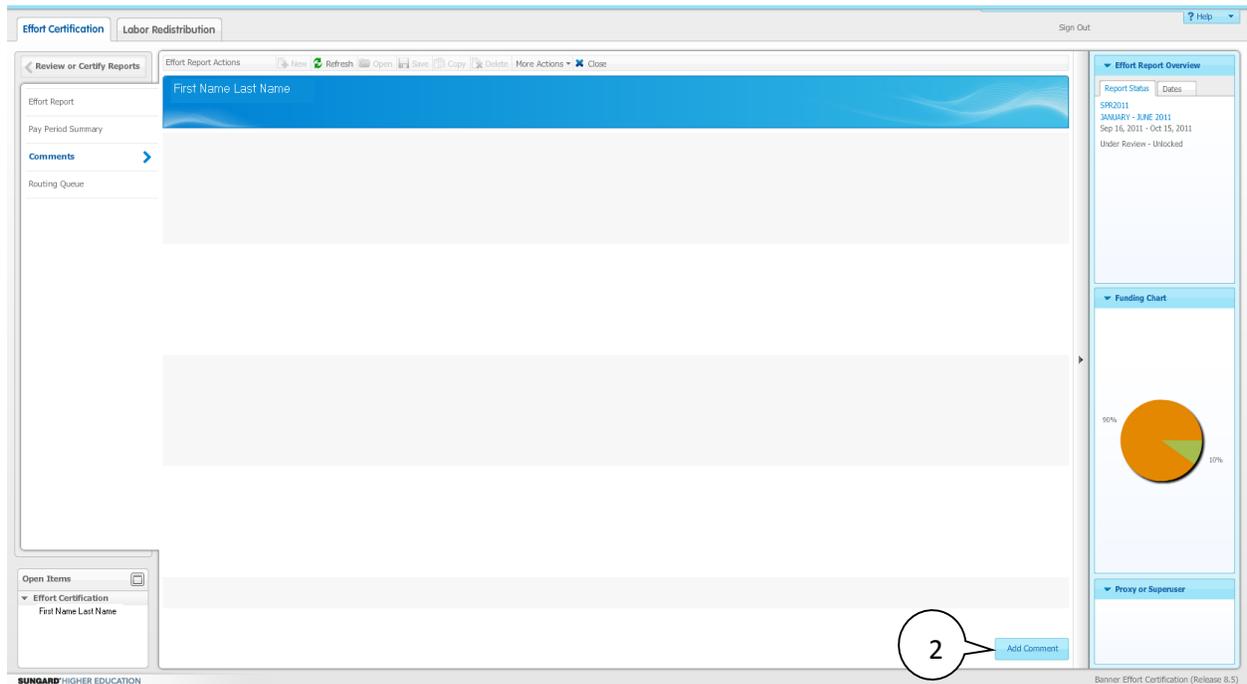
1. Open form FTMFUND and click the **Enter Query**  button.
2. Enter the Grant number in the **Grant** field or the Fund number in the **Fund** field.
3. Click the **Execute Query**  button to populate data.
4. The Fund Manager is listed in the **Financial Manager** field.

Appendix C: Adding Comments

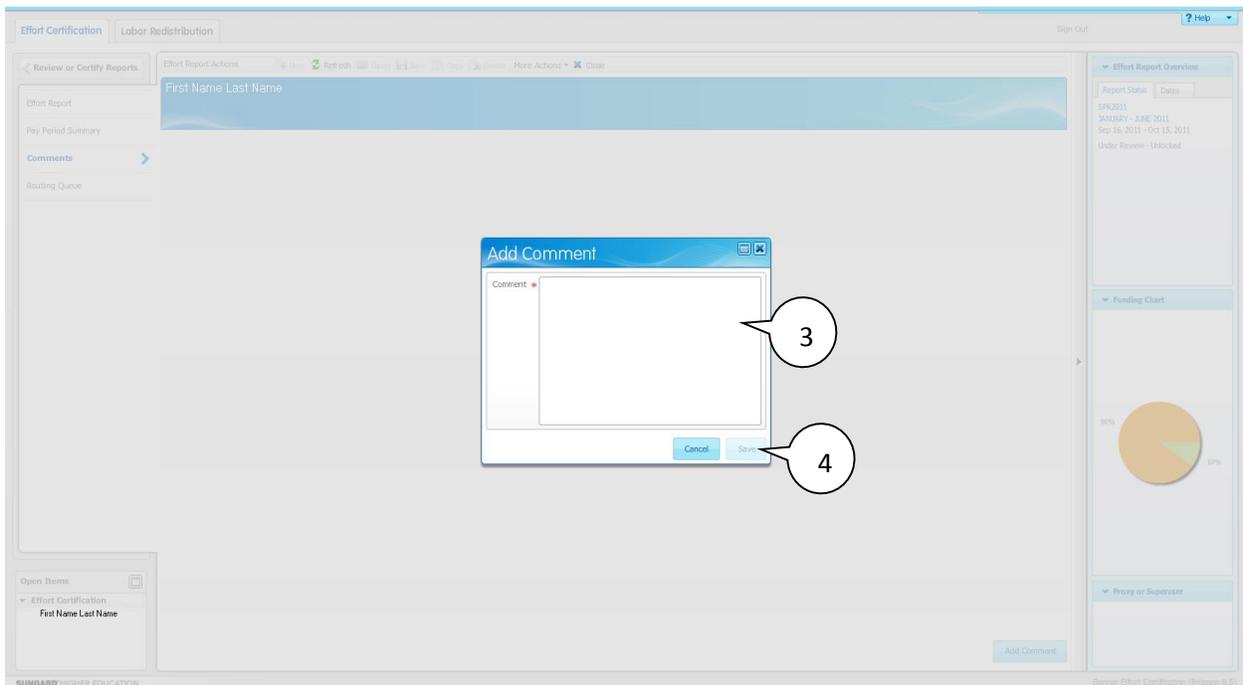
Adding comments is not required when reviewing an employee's effort report. However, if deemed appropriate, comments can be added using the following steps.



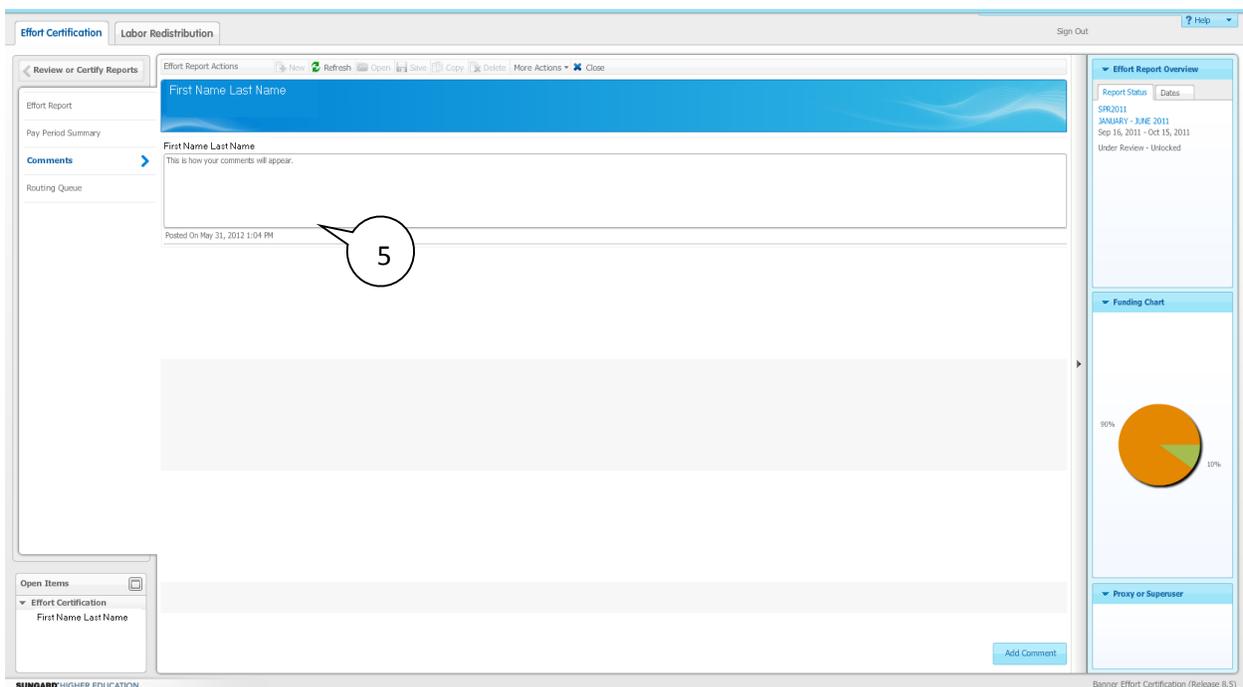
1. Click **Comments** in the left navigation pane.



2. Click the **Add Comment** button.



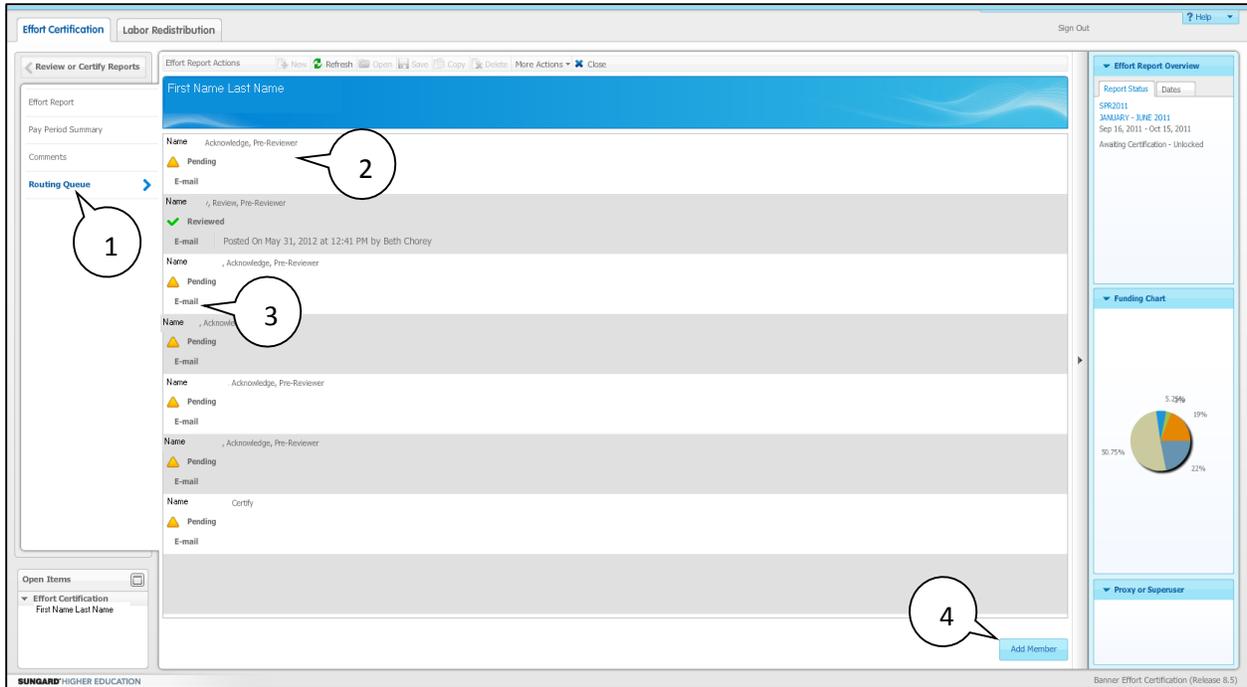
3. Enter your comment in the space provided.
4. Once you start typing, the **Save** button will become active. Click **Save** to save your comments.



5. Your comments will appear on the Comments page with a date/time stamp. Once entered, comments cannot be deleted or edited.

Appendix D: Routing Queue

The routing queue shows all the people who need to acknowledge, review, and/or certify the effort report. The following is an explanation of what you will see on the routing queue.



1. Access the routing queue by clicking **Routing Queue** link from the left navigation pane.
2. Each person having a role in the effort certification process is listed in the routing queue. Each listing will include...
 - a. The person's name
 - b. The action required by the person – Review, Acknowledge, or Certify
 - c. The role of the person if other than the employee – Pre-Reviewer
 - d. The status of the person's action – Pending, Reviewed
3. The **email** link will open a blank email to the individual.
4. The **Add Member** button is not used by NMSU.