

PERT Department Representative's Effort Review Checklist

- ❑ 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).
- ❑ Verify that all employees identified above, have an effort report in the system for the reporting period.
 - **Best Practice:** Run GEMS Query: U_ER_ADMIN_REVIEW to ensure all required effort reports have been generated.
- ❑ Review each effort report for accuracy (Account Details info vs. current and pending pay history).
- ❑ Verify that the appropriate payroll percent was charged to the appropriate accounts.
- ❑ Verify that any and all committed cost sharing is represented.
- ❑ 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 GEMS combination code(s) as needed.
- ❑ Enter comments/explanations for all changes.
- ❑ Verify all allowable certifiers are correctly identified on the effort report's Allowable Certifiers page as needed.
 - **OPS - PI/Co-PI** common to all projects listed on the report; supervisor listed on GEMS Job Data for the associated Empl Rcd#; Department Head or Chair.
 - **Terminated non-OPS - PI/Co-PI** common to all projects listed on the report; Reports To listed on GEMS Job Data for the associated Empl Rcd#; Department Head or Chair.
- ❑ Notify certifiers when you have completed your review and/or adjustments to their effort report(s) by,
 - clicking on the email button on the effort report via the Admin Review page to notify that employee if they are the certifier or
 - navigating to the Effort Certify page, open the effort report for the employee you wish to notify and use the "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 particular effort report once he or she is logged into the system.
 - **Note:** In order to use the Notify feature you must be on the certifier page and not admin review page.
 - **Best Practice:** Use the DR Email Notification Templates - Certifier's Announcement
- ❑ Monitor status of the reports for "Rejected" reports, adjust as appropriate and notify the certifier.
- ❑ Monitor status of reports to remind certifiers of their deadlines to certify.
 - **Best Practice:** Use the DR Email Notification Reminder Template
- ❑ Prepare and submit all **retroactive expenditure transfers (RETs)**. **RETs are required for all Account Details changes.** Refer to ResearchCCHIP #001 (<https://www.usf.edu/research-innovation/sr/pa/documents/cchip/cchip001-cost-transfers.pdf>), Timeline for Processing Cost Transfers on Sponsored Research Projects
 - **Best Practice:** Use the Pay Distribution Worksheet to track submitted RETs:
<https://www.usf.edu/research-innovation/sr/pa/documents/pay-distribution-worksheet.xls>