Revised Effort Certification Process for Principal Investigators
December 13, 2007

Pre-Review for Principal Investigators

- PI logs in Spectrum Portal using UUID & password
- PI accesses Online Effort System (SSO)
- PI clicks “Grants” tab
- PI selects a name & reviews data

Data Accurate?
- No: Contact Grants Accounting
- Yes: End of Pre-Review Process for Approver

Approval for Principal Investigators

- PI Receives Automatic Email
- PI logs in Spectrum Portal using UUID & password
- PI accesses Online Effort System (SSO)
- PI clicks “Approvals” tab
- PI selects a name & reviews data

Data Accurate?
- No: Contact Certifier to correct data.
- Yes: Click ‘Approve’

End of Approval Process for Approver

End of Effort Process

Changes made?
- No: Changes made?
- Yes: Grants Accounting reviews & takes appropriate actions.

Definitions

Approver – the PI.
Certifier – the faculty, PI, post-doc, graduate assistant or employee who, during the relevant time period, contributed effort to a sponsored program.
Effort – the total employee’s time spent on University activities for which the employee is compensated by the University.
Principal Investigator (PI) – the individual responsible for the conduct of the sponsored program.