

Effort Reports follow a designated approval path (workflow), creating notifications in each Approver’s worklist. A notification requires each Approver to take the appropriate action. The available buttons on the notification depend on the Approver’s role in certifying the report. The result of selecting a specific Action Button determines the status of the effort report.

Department Effort Officer (DEO)

Action Button	Explanation
Close	Close indicates that information is incorrect/documents need to be reprocessed. Status changes to REJECTED , and a new effort report is generated.
Forward	Forward indicates that no additional process is required and changes the status to ACCEPTED .
Reassign	By selecting Reassign , the DEO is transferring the rights of the document to a third-party who must then Close, Forward, or Reassign the document. Note: <i>This does not allow the third-party to certify the effort report. The DEO is only transferring their responsibility. The third-party must take action to move the effort report into its next status.</i>

UAB Project Employee

Action Button	Explanation
Certify	Certify changes the report status to CERTIFIED if the Project Employee determines all information to be correct.
Reject	Reject indicates that information is incorrect/documents need to be reprocessed. Status changes to REJECTED , and a notification is sent to the DEO’s queue. <i>A comment is required when Rejecting an effort report</i>
Reassign	By selecting Reassign , the Project Employee is reassigning the effort report to a third-party for review. <i>The third-party must take action to move the effort report into its next status</i>

UAB Project Employee (Non-faculty 04-Irregular)

Action Button	Explanation
Forward	After reviewing and determining the effort report is correct, Forward sends the report to the PI(s) for certification.
Reject	Reject indicates that information is incorrect/documents need to be reprocessed. Status changes to REJECTED , and a notification is sent to the DEO’s queue. <i>A comment is required when Rejecting an effort report</i>
Reassign	By selecting Reassign , the Project Employee is reassigning the effort report to a third-party for review. <i>The third-party must take action to move the effort report into its next status</i>