

How to get an Effort Form out of Post-Review

Determining the problem:

1. What is the situation, for which PIDs are Effort and payroll not in sync? Review the form in post-review.
 - a. Certified % more on sponsored PID than the payroll % that was distributed
 - b. Certified % less on sponsored PID than the payroll % that was distributed
2. Is the certifier still employed?
 - a. Yes
 - b. No
3. When was the form certified?
4. Review payroll drill down
 - a. Were RCTs posted after the form was certified?
 - b. Was the outage a result of an RCT?
 - c. Was there retro pay (paid or repaid, FOR the period of the Effort form in post-review)?
5. Run PCD by PP coinciding with effort periods
6. Do the PCD & Effort forms (amount per payroll column) reconcile?

Solving the problem:

1. If payroll is correct, the form needs to be recertified
 - a. If the certifier is employed – have the certifier recertify
 - b. If the certifier is no longer employed –
 - i. If the certified % is less than the payroll % - wages will have to be moved off the sponsored PID as the form cannot be recertified
 - ii. If the certified % is more than the payroll % - Cost will assist in forcing the form into completion
2. If the certification is correct
 - a. If the certified % is less on a sponsored PID than the payroll % that was distributed, the excess wages need to be moved off the sponsored PID which will result in a credit to the sponsor
 - b. If the certified % is more on a sponsored PID than the payroll % that was distributed
 - i. If the PP is LESS than 1 year ago
 1. If the sponsored PID is still open, wages may be moved to the sponsored PID
 2. If the sponsored PID is closed, investigate w/ SPAC, can the account be opened? (often not)
 - ii. If the PP is OVER 1 YEAR ago,
 1. wages cannot be moved to a sponsored PID this long after the fact
 2. wages can be moved to a cost share
 3. Cost will need to assist in forcing completion of the form
3. If the PCD & Effort forms (amount per payroll column) do not reconcile
 - a. If there was retro pay, contact effort help and let them know the PCD & effort do not tie, and that retro pay was involved

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- b. If there was no retro pay, contact effort help and let them know the PCD & effort do not tie and that you did not see retro pay