

ECRT – FOLLOW UP ON UNCERTIFIED CARDS

The University of Akron, ECRT 2018 version 5.2

ecrt@uakron.edu

Additional Information

Each row in the Certifier list is an effort card that is still open:

- Statement Owner is the employee that was paid on a grant.
- Department is the employee's home department.
- Period is the semester that the card belongs to.
- Due Date is when the card should be certified.
- If status starts with:
 - "Not Certified", then the row is a card that the PI(s) must certify.
 - "Not Ready", then the row is a future card that can be ignored.

If you click on the Department, Ecrt will take you to the Department page.

Select the Card to Review

1. After signing into Ecrt, click on the Associated Certifiers tab.

If your Work List displays rows with a Due Date older than today, then these cards are overdue and must be certified as soon as possible.

Work List for Christie Rodgers

CARD CERTIFIERS – Under **Statements Awaiting Certification**, effort cards in NOT CERTIFIED status must be certified. Click on a Statement Owner's name to access his/her card. At the top of the page that appears, click on the words **Effort Statement Instructions** for help.

EFFORT COORDINATORS – Under **Effort Tasks** are effort cards you must process or not process (return to the PI). In the Type column below, click a blue link to access its card. On the page that appears, read the instructions (in bold) for more guidance.

Under **Associated Certifiers** are Not Certified effort cards. Please follow up with the PI on cards that are past their due date to get them certified.

Statements Awaiting Certification	Associated Certifiers (20)						
Statement Owner	Department	Period	Due Date	Type	Status	PI	
Brockett, Beverly	003703-003703 - VP, Innovation&Econ Dev	Fall 2016 (09/29/2016-01/16/...	04/20/2020	Base	Not Ready for Certification		
		Summer 2017 (5/22/2017-9/2...	12/21/2017	Base	Not Certified, Not Processed, Re-Opened		
Dent, Darlene	004723-004723 - Assoc VP/Controller	Fall 2016 (09/29/2016-01/16/...	04/20/2020	Base	Not Ready for Certification		
Hergenrither, Diane	000530-000530 - Curricular/Instructional Study	Summer 2017 (5/22/2017-9/2...	12/21/2017	Base	Not Certified, Not Processed		
Hernandez, Bianca	004723-004723 - Assoc VP/Controller	Fall 2016 (09/29/2016-01/16/...	04/20/2020	Base	Not Ready for Certification		
		Summer 2017 (5/22/2017-9/2...	12/21/2017	Base	Not Certified, Not Processed		
Kemp, Kimberly	004723-004723 - Assoc VP/Controller	Fall 2016 (09/29/2016-01/16/...	04/20/2020	Base	Not Ready for Certification		
		Summer 2017 (5/22/2017-9/2...	12/21/2017	Base	Not Certified, Not Processed, Re-Opened by ...		
Luccioni, Jay	004749-004749 - Telecomm Services	Fall 2016 (09/29/2016-01/16/...	04/20/2020	Base	Not Ready for Certification		
McElfresh, Stephanie	004723-004723 - Assoc VP/Controller	Fall 2016 (09/29/2016-01/16/...	04/20/2020	Base	Not Ready for Certification		
		Summer 2017 (5/22/2017-9/2...	12/21/2017	Base	Not Certified, Not Processed		
Rodgers, Christie	004723-004723 - Assoc VP/Controller	Fall 2016 (09/29/2016-01/16/...	04/20/2020	Base	Not Ready for Certification		
		Spring 2017 (1/17/2017-5/21/...	09/20/2017	Base	Not Certified, Not Processed, Re-Opened by ...		
		Summer 2017 (5/22/2017-9/2...	12/21/2017	Base	Not Certified, Not Processed		
Smith, Lois	004723-004723 - Assoc VP/Controller	Fall 2015 (09/31/2015-01/16/...	06/27/2016	Base	Not Certified, Not Processed		
		Spring 2016 (01/19/2016-05/...	11/25/2016	Base	Not Certified, Not Processed		
		Summer 2016 (05/23/2016-08...	07/27/2017	Base	Not Certified, Not Processed		
		Fall 2016 (09/29/2016-01/16/...	04/20/2020	Base	Not Ready for Certification		
		Spring 2017 (1/17/2017-5/21/...	09/20/2017	Base	Not Certified, Not Processed		
		Summer 2017 (5/22/2017-9/2...	12/21/2017	Base	Not Certified, Not Processed, Re-Opened by ...		

2. Click on an overdue row.

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- The last, or only, PI to certify the card must also certify the unsponsored row.
- Click the Effort Statement PDF icon at the top right to print the Effort Statement.
- Near the bottom of the card, click on the Effort Note History + sign to see any saved comments.

Review the Card's Header & History

3. Check the card's header:

The card's employee (covered individual) & semester (period of performance) appear at the top of the card in the blue bar. The status of the card should start with "Not Certified".

Smith, Ma Lisa W - 7522 (AA Employee) Date Effort Period: 05/22/2017 to 08/31/2017 Due Date: 12/31/2017 Status: Not Certified, Not Processed, No Opened by Payroll Adjustment Reconciliation

WARNING: You cannot certify this Effort Statement because you do not have the right to certify Statements.
INFO: This Effort Statement has been previously saved.

Speedtype (Accounts) [-]	Payroll	Cost Share	Required Effort	Computed Effort	Certified Effort	Certify?
Sponsored						
54256 Kinship 100002837Caldan	0.0%	0.0%	0.0%	0.0%	0.0%	<input checked="" type="checkbox"/>
54253 Coughl 1000028755Pro	14.1%	0.0%	0.0%	14.1%	14.1%	<input checked="" type="checkbox"/>
Sponsored Total:	21.0%	0.0%	0.0%	21.0%	21.0%	
Non Sponsored						
290211 Sponsored Program Accounting	38.5%	0.0%	0.0%	38.5%	38.5%	<input checked="" type="checkbox"/>
264861 IDC Debt Off Acad Affairs	38.5%	0.0%	0.0%	38.5%	38.5%	<input checked="" type="checkbox"/>
Non Sponsored Total:	77.0%	0.0%	0.0%	77.0%	77.0%	
Grand Total:	100.0%	0.0%	0.0%	100.0%	100.0%	

2 rows are uncertified

4. Look in the Certify? column to see if any rows have been checked. If so, these have been certified. The rows without a check are still uncertified:
 - If any Sponsored speedtype has an unchecked box, its assigned PI must still certify this row.
 - If the gray non-sponsored row is the ONLY row not checked, any PI on this card can certify it.

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Additional Information

Effort Transaction History

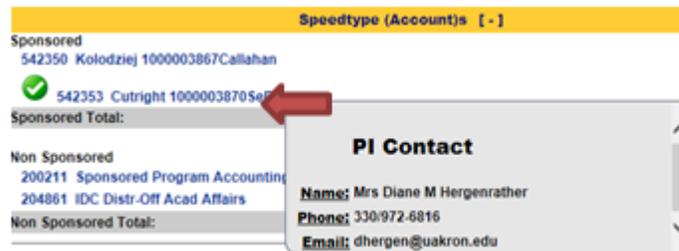
- Payroll rows loaded into this card display as “System User – 444-44-4444”.
- The last PI to certify will change the card status to “Certified”.

If a PI is unable to certify -

- A Designee may be assigned to the PI’s account. A Designee can certify any card containing this account.
- A Proxy may be assigned to the PI. A Proxy can certify all rows on the PI’s own card.

Find & Contact the PI(s) who need to Certify

5. To find the PIs who must still certify this card, move your mouse on top of each uncertified Sponsored speedtype name until the PI Contact box pops up.



Alternatively, you can scroll to the bottom of the card & click on the **Certifiers & Approvers** arrow. For each Certifier row, find the certifier’s name & his/her associated speedtypes (accounts)

Type	Name	Speedtype (Account)	Reason
Certifier	Hergenrather, Diane - 2289369	542353 Cutright 1000003870SePro	Speedtype (Account) PI
Certifier	McElfresh, Stephanie - 1215174	542350 Kolodziej 1000003867Callahan	Speedtype (Account) PI
Approver	Rodgers, Christie - 1251772	N/A	Department Effort Coordinator

6. In some cases, a Designee may be assigned to the speedtype or a Proxy for the PI. Check for Designees or Proxies in the INFO bar under the card’s blue header.

WARNING - You cannot certify this Effort Statement because you do not have the right to certify Statements.
INFO - This Effort Statement has been previously saved.
INFO - Dr John P Szabo - 11799 is currently assigned as a designee on Speedtype (Account) - 532124

7. If no Designee or Proxy exists, contact the PIs who must still certify. Otherwise, contact the Designee or Proxy.

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Additional Information

- All Associated Certifier rows that have a Due Date older than today are overdue.
- The overdue cards will stay in your Work List until they are certified or manually closed by the Central Administrator.
- To email the Central Administrator in ORA for help, click [Links](#) in the top blue bar & select **Ask for Ecrt Help Desk Assistance**.

Review Additional Cards

8. When you are finished reviewing a card, point your mouse on [Home](#) in the top blue bar and select Home page from the drop down list.



9. Click on the Associated Certifiers tab.

If additional overdue “Not Certified” cards appear in your Work List, you may choose one & repeat the steps in this guide starting with **Review the Card’s Header & History**.

Statement Owner	Department	Period	Due Date	Type	Status
Brockett, Beverly	003703-003703 - VP, Innovation&Econ Dev	Fall 2016 (08/29/2016-01/16/... Summer 2017 (5/22/2017-8/2... 12/21/2017	04/20/2020 12/21/2017	Base Base	Not Ready for Certification Not Certified, Not Processed, Re-Opened
Dent, DaNelle	004723-004723 - Assoc VP/Controller	Fall 2016 (08/29/2016-01/16/...	04/20/2020	Base	Not Ready for Certification
Hergenrath, Diane	000530-000530 - Curricular/Instructional Study	Summer 2017 (5/22/2017-8/2... 12/21/2017	12/21/2017	Base	Not Certified, Not Processed
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Kemp, Kimberly	004723-004723 - Assoc VP/Controller	Fall 2016 (08/29/2016-01/16/... Summer 2017 (5/22/2017-8/2... 12/21/2017	04/20/2020 12/21/2017	Base Base	Not Ready for Certification Not Certified, Not Processed, Re-Opened by...

Once you are done reviewing cards, be sure to click Sign Out at the top right side of the page.



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Additional Information

- Besides the Sponsored section, other sections on the Dashboard are:
 - Non-Sponsored
 - Non-Department
 - Terminated

These sections are informational only and include cards with no sponsored accounts, other department's cards having rows (accounts) associated to your department, and cards belonging to employees who have no recent payroll.

- Press an employee's envelope icon on the far right to email this employee. Click Allow if the IE Security box appears.
- Press on an employee's looking glass on the far right to open the employee's profile page. Simply close this page when you are done reviewing it.

Check the Department Dashboard (optional)

- If you prefer, you can view card statuses by Department. On the top blue bar, click Manage & select Department Dashboard from the drop down.



- Click into the second search box and select one of your Departments. Do not select a College. Then press Choose.



- Click on the People tab and wait a minute or two for the page to load in and display all the cards' icons under the Statements column. Focus on the top (Sponsored) section of the Dashboard.

The 'People' tab of the Department Dashboard. It shows a table of employees with columns for Name, Employee Type, Employee ID, Role, Statements, and Action. An orange arrow points down to the 'Statements' column.

Name	Employee Type	Employee ID	Role	Statements	Action
Sponsored					
Hernandez, Ms Banka L	UA Employee	2601850	Grad Assistant	[Icons]	[Icons]
Kemp, Ms Kimberly	UA Employee	1649168	Grad Assistant	[Icons]	[Icons]
McElfresh, Ms Stephanie	UA Employee	1215174	Principal Investigator	[Icons]	[Icons]
Rodgers, Mrs Christie A	UA Employee	1251772	Effort Coordinator	[Icons]	[Icons]
Smith, Ms Lois M	UA Employee	7532	Grad Assistant	[Icons]	[Icons]
Non-Sponsored					
Non-Department					
Terminated					

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Additional Information

- Move your mouse to hover over any icon in the Statement column to view the card's employee, semester, and status.
- Other icon colors include:
 - Blue = future cards not ready
 - Green = closed cards
 - Black = closed cards
 - White = closed cards

Only follow up on the red & yellow icons.

- Other tabs on the Dashboard are **Award and Speedtype** and **Department Information**. The Award tab contains a full list of this department's accounts. The Department tab shows the assigned Effort Coordinator and the college's departments.

Check the Department Dashboard (optional)

4. In the Statements column, look for icons with a red X; these are uncertified cards. Also look for icons with a yellow ! triangle; these are unprocessed cards.



If an icon with a red X appears, click on this icon to open the card. Start with Step 3, at the beginning of this guide, to get the card certified.

If an icon with a yellow ! triangle appears, you need to process this card. In the top blue bar, click on Home and select Home page to open your Work List. Follow the steps in the **Process Cards guide**.

Home Certify Manage Reports Administration Links

Work List for Christie Rodgers

CARD CERTIFIERS – Under **Statements Awaiting Certification**, effort cards in NOT CERTIFIED status must be certified. Click on a Statement Owner's name to access his/her card. At the top of the page that appears, click on the words **Effort Statement Instructions** for help.

EFFORT COORDINATORS – Under **Effort Tasks** are effort cards you must process or not process (return to the PI). In the Type column below, click a blue link to access its card. On the page that appears, read the instructions (in bold) for more guidance. Under **Associated Certifiers** are Not Certified effort cards. Please follow up with the PI on cards that are past their due date to get them certified.

Statements Awaiting Certification	Effort Tasks (2)	Associated Certifiers	
Type	Identifier	Name	Date
Process Base Certification Statement	1215174	McEfresh, Stephanie	06/05/2018 9:48 AM
Process Base Certification Statement	2001650	Hernandez, Banka	05/31/2018 1:50 PM