ECRT - PROCESS CARDS

Additional Information

- The employee designated as the primary Effort Coordinator for a department must process its cards.

- Each "Process" row in the Task list is a certified card: The Identifier column is the employee's UA ID. The employee's name appears in the next column. The date that the employee certified the card displays in the last column.

- On the left gold bar, click on "Ask for Ecrt Help Desk Assistance" to email your questions to the Ecrt Administrator.

Select the Card to Review

1. After signing into Ecrt, click on the Effort Tasks tab.

2. If your Work List displays "Process Base Certification Statement" rows, then these are the certified cards that you need to review.

3. Click on the **Process Base Certification Statement** row you wish to review.

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Additional Information

- The basic instructions appear in bold near the top of the card.

- Click the Effort Statement PDF icon at the top right to print the Effort Statement.

- You must review cards that contain a large certified variance on 1 or more rows.

- A large variance occurs when:

  The Certified Effort column exceeds the Computed Effort column by +/-5% or more.

  And the dollar amount of the variance exceeds $100.

- To see the each payroll that loaded into the card by account, click on first icon in the gray bar & then select Payroll report.

Review the Card

4. Make sure the employee (covered individual) & semester (period of performance) that you want to review appears at the top of the Statement.

5. The last PI who certified this card appears in the purple box above the gray bar.

Process Base Effort Statement (05/22/2017 to 08/27/2017)

Due Date: 12/21/2017

Covered Individual:	Ms Bianka L Hernandez - 2601650	Location:	24
Title:	Mgr, Financial Research Admin	Appointment:	CP
Department:	004723 - 004723 - Assoc VP/Controller	Effort Coordinator:	Christie A Rodgers
Email:	bhb@uakron.edu	Period of Performance:	05/22/2017 to 08/27/2017
Status:	Certified, Not Processed		

This Effort Statement contains a large variance between the Computed Effort % based on the employee's salary vs the Certified Effort % as entered by the PI. The Cost Transfer Dollars column shows the +/- amounts that will be moved to and from these speedtypes if you process this card. After you review the cost transfer dollars with the PI:

- Press Cost Transfer Needed if the card is OK and a PAF should be initiated.
- Press Do Not Process if the card must be returned to the PI for correction.
- Press Cancel to exit the card without processing it yet. It will stay on your Work List.

Last Certified by Mr Matthew Kolodziej - 1292236 on 05/31/2018 1:50 PM

6. Between the 2 gold bars, review the accounts in the Speedtype column with dollars in the Cost Transfer column. This is the estimated amount of payroll that should be moved **from** one account **to** another account to match the effort certified by the PI.

Speedtype (Account(s [+])	Payroll	Cost Share	Required Effort	Computed Effort	Certified Effort	Cost Transfer Dollars	Cost Transfer Percentage	Cost Share is Cost Transfer
Sponsored								
542351 Kolodziej 1000003868GAR	71.2%	0.0%	0.0%	71.2%	50.0%	$ -142.00	-21.2%	0.0 %
542355 Mahajan 1000003872CEG	28.8%	0.0%	0.0%	28.8%	50.0%	$ 142.00	21.2%	0.0 %
Sponsored Total:	100.0%	0.0%	0.0%	100.0%	100.0%	$0.00	0.0%	0.00%
Grand Total:	100.0%	0.0%	0.0%	100.0%	100.0%	$0.00	0.00%	0.00%

Cancel   Cost Transfer Needed   Do Not Process

Additional Information

Effort Transaction History

- The Certifier's transaction rows display as "Certified at x%".

- Payroll rows loaded into this card display as "System User – 444-44-4444".

- The last PI to certify will change the card status.

Near the bottom of the card, click on the Effort Note History + sign to see any saved comments.

Find the PIs who Certified

7. To view all the PIs who certified this statement, scroll to the bottom of the card & click on the Effort Transaction History's + sign.

8. Find the rows with "Certified at x%" & note the Name & Speedtype on these rows.

Name	Speedtype (Account)	Transaction
Mr Matthew Kolodziej - 1292236	N/A	Changed from Not Certified, Not Processed to Certified, Not Processed
Mr Matthew Kolodziej - 1292236	542351 Kolodziej 1000003868GAR	Certified at 50.0%
Mrs Diane M Hergenrather - 2289369	542355 Mahajan 1000003872CEG	Certified at 50.0%

Check with these PI(s) to be sure that they intended to certify at different % than what was computed on the card. A PAF will be needed to move the payroll among the accounts shown on the card.

9. If you are ready to process the card, go to the next slide. Otherwise, you may press **Cancel** until you are able to talk with the PI(s) who certified.

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Additional Information

- If the Cost Transfer Needed button does not appear, then the sum of the Cost Transfer dollars is not zero (within a $0.20 tolerance).

- If this card is processed with cost transfer dollars, the Central Administrator in ORA will likely call you or the PI unless you enter a note.

- Once you process a card, this task will disappear from your Work List.

Process or Return the Card

8. Once you have reviewed the card with the PI(s), you are ready to act on the card.

Computed Effort	Certified Effort		Cost Transfer Dollars	Cost Transfer Percentage	Cost Share is Cost Transfer
71.2%	🪙	50.0%	$ -142.00	-21.2%	0.0 %
28.8%	🪙	50.0%	$ 142.00	21.2%	0.0 %
100.0%		100.0%	$0.00	0.0%	0.00%
100.0%		100.0%	$0.00	0.00%	0.00%

[Cancel] [Cost Transfer Needed] [Do Not Process]

➢ To accept the card without revision:

- Enter an explanatory note in the text box under the second gold bar.

  Use the text field below to enter an Effort note. (4000 character max.)

  After discussing the cost transfers with Dr. Pugh, we agreed that a cost transfer should take place. I am processing this card.

  [Save Effort Note]

- Press **Save Effort Note**.
- Then press **Cost Transfer Needed** on the gold bar.
- You will be returned to the Work List. Skip to step 10.

➢ To return the card to the PI for revision, press the **Do Not Process** button & continue on to step 9.

Additional Information

- Emails are sent out the following morning.

- Once you return a card, this task will disappear from your Work List. You can go on to process any remaining tasks.

- If the PI revises the returned card so that the new certified effort is within +/- 5% of the computed effort, this card will not return to your Work List after certification.

Return the Card to the PI

9. After you press the **Do Not Process** button, an "email notification message" will appear.

Message from webpage

An email notification may be sent as part of this process. To send the email, select OK. To avoid sending the notification, select Cancel.
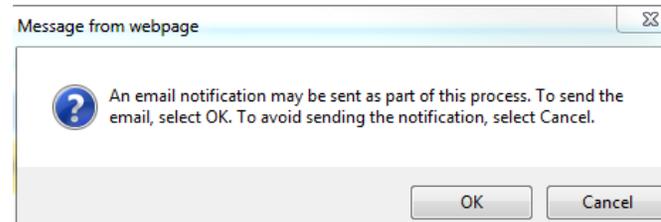
OK   Cancel

➢ Click OK to send an email to the PI :
- Compose the email message on the next popup that appears.
- Click **Send the Email**. You will be returned to your Work List.

Send Email   close

Subject: Your Ecrt certified card was returned for revision

Message:

Your Effort Card is returned due to a variance between your certify % and the computed % that exceeds 5% on an Account. Please review & correct the certify %s on this card, add a note to the card if needed, and re-certify the card.

body p

Send the Email
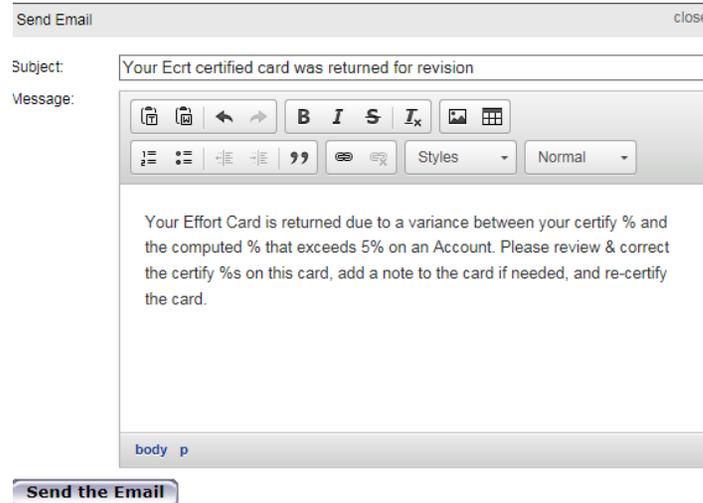
➢ Or click Cancel to send no email to the PI. You will be returned to your Work List.

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Additional Information

- All Process Base Certification Statement rows will stay in your Work List will you accept the cards or returned them to the PIs.

Process Additional Cards

10. If additional "Process Base Certification Statement " rows appear in your Work List, you may choose one & repeat the steps in this guide starting with **Review the Card's Header & History**.

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	McElfresh, Stephanie	06/05/2018 9:46 AM

If you are done processing cards, be sure to click **Sign Out** at the top right side of the page.

| Welcome, Christie Rodgers | Sign Out |