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.

2. Click on an overdue row.
Additional Information

- 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”.

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.
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)

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.

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

   ![Home Page]

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.

<table>
<thead>
<tr>
<th>Statement Owner</th>
<th>Department</th>
<th>Period</th>
<th>Due Date</th>
<th>Type</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brockett, Beverly</td>
<td>VP, Innovation &amp; Econ Dev</td>
<td>Fall 2018 (09/29/2018-01/16/2019)</td>
<td>04/20/2020</td>
<td>Base</td>
<td>Not Ready for Certification, Not Certified, Not Processed, Re-Opened</td>
</tr>
<tr>
<td>Dent, Dalila</td>
<td>Assoc VP Controller</td>
<td>Fall 2018 (09/29/2018-01/16/2019)</td>
<td>06/29/2020</td>
<td>Base</td>
<td>Not Ready for Certification, Not Certified, Not Processed</td>
</tr>
<tr>
<td>Hergetmeyer, Dave</td>
<td>Computer/Institutional Study</td>
<td>Summer 2017 (07/02/2017-07/13/2017)</td>
<td>12/21/2017</td>
<td>Base</td>
<td>Not Ready for Certification</td>
</tr>
<tr>
<td>Hernandez, Brian</td>
<td>Assoc VP Controller</td>
<td>Fall 2018 (09/29/2018-01/16/2019)</td>
<td>04/20/2020</td>
<td>Base</td>
<td>Not Ready for Certification</td>
</tr>
<tr>
<td>Kemp, Kimberly</td>
<td>Assoc VP Controller</td>
<td>Fall 2018 (09/29/2018-01/16/2019)</td>
<td>04/20/2020</td>
<td>Base</td>
<td>Not Ready for Certification</td>
</tr>
</tbody>
</table>

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

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

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

3. 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.
ECRT – FOLLOW UP ON UNCERTIFIED CARDS

The University of Akron, ECRT 2018 version 5.2

clrt@uakron.edu

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.

![Statements](image)

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.