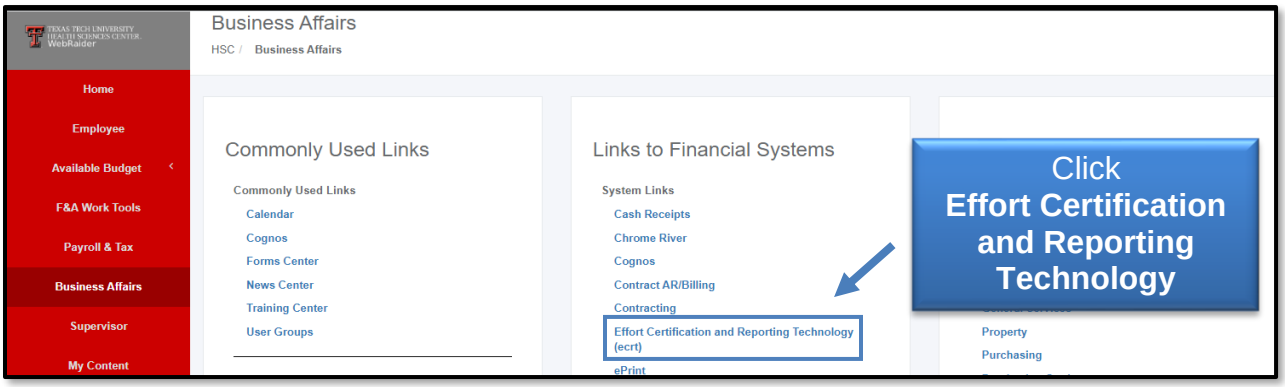
Certify My Statement in ecrt - PI Role

Effort Certification and Reporting Technology (**ecrt)** is designed to help you comply with the provisions of TTUHSC's effort reporting policies, federal policy OMB Uniform Guidance (UG) section 2 CFR 200.430, NIH Salary Limitation on Grants, and other relevant agency policies that govern the need to provide certification of an individual's effort pursuant to his/her sponsored and non-sponsored programs. TTUHSC's effort certification process is simplified and standardized as a result of this technology.

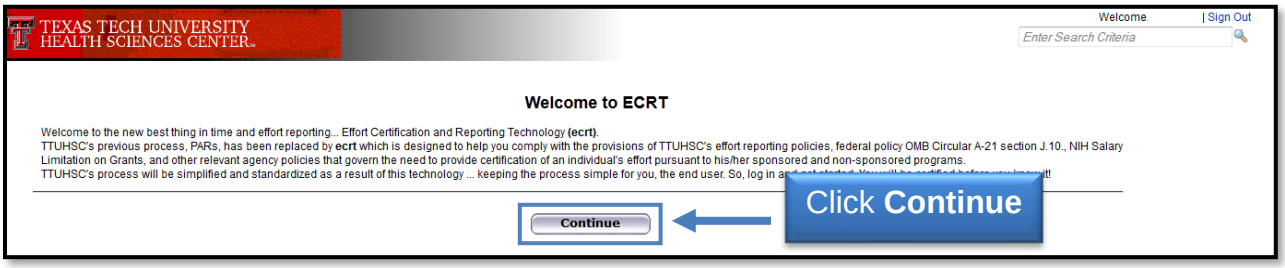
The system can be accessed from:

- ecrt
- WebRaider Portal > Business Affairs tab > Links to Financial Systems > **Effort Certification and Reporting Technology (ecrt)**



The link can also be accessed through the F&A Work Tools tab.

The ECRT Welcome page is displayed. Click **Continue**.

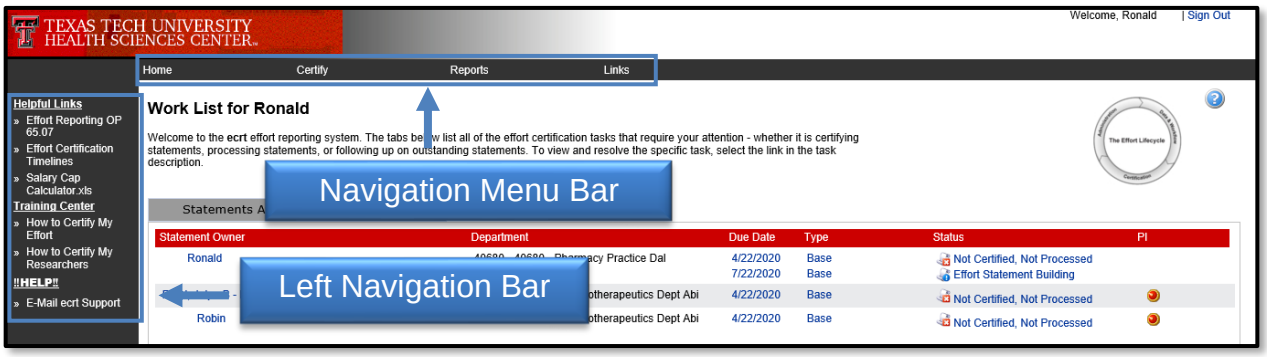


Navigation

The primary method of navigating within the system is using the navigation menu bar along the top of the screen. The navigation menu bar is on every screen of the application, allowing you to move from one page to another quickly. When you place the cursor on a label in the navigation menu bar, the available pages to which you can navigate appear in the menu drop-down list. The Home menu on the far left returns the user to the Work List from anywhere in the application. There are also clickable links

available on certain pages of the application that allow you to select for navigation to other pages.

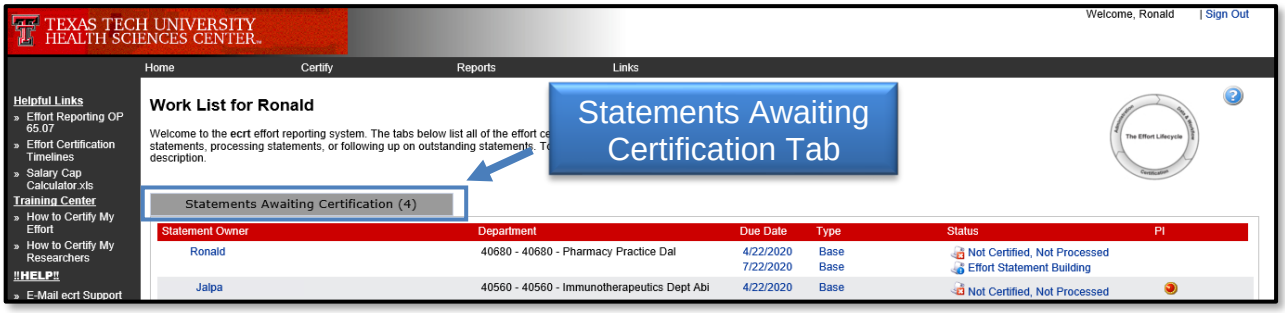
The Left Navigation Bar that is available on the Work List page contains useful links to training documents and other reference material. These links are also displayed in the Links drop-down menu in the navigation menu bar which is available at the top of every page of the application.



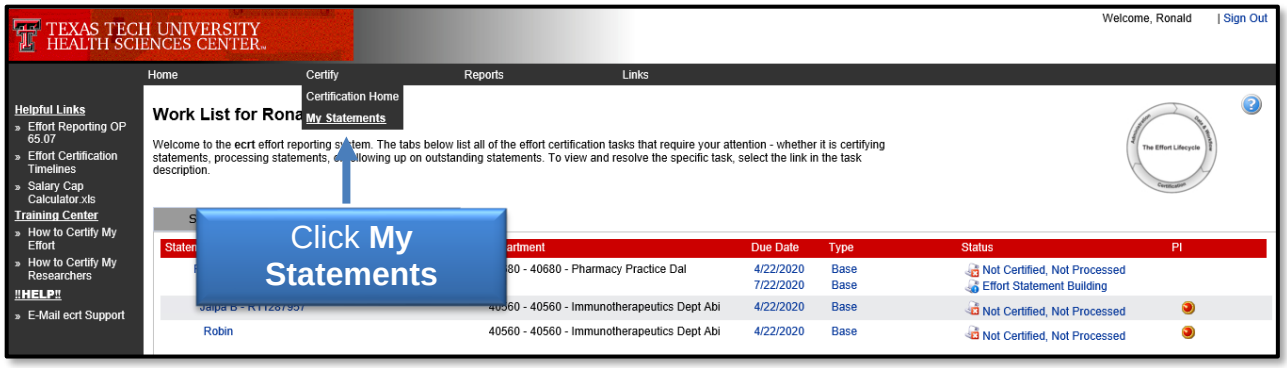
Work List Page

The PI Work List page contains the tasks that require your attention in the Statements Awaiting Certification tab. Next to the tab name is the number of items displayed on the page. This list shows all statements for which you have certification responsibility.

To access a statement from the list, select **your name** from the Statement Owner column which will direct you to your effort statement page. Selecting the **Due Date**, statement **Type**, or **Status** of a specific statement will also take to the effort statement.

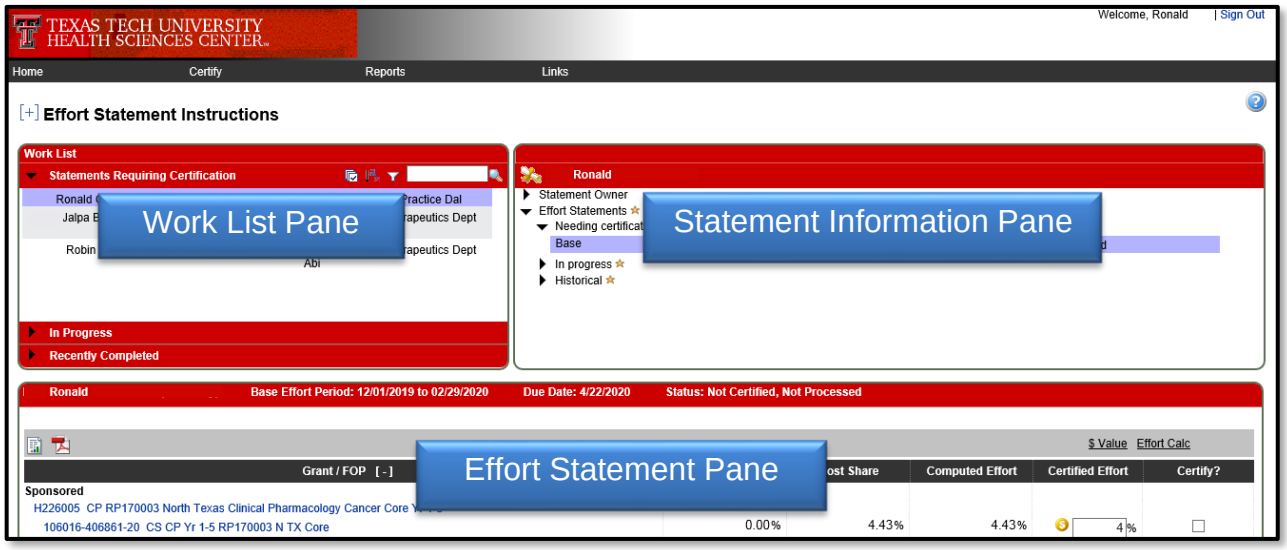


You may also access your statement by clicking **My Statements** from the Certify navigation menu located in the navigation menu bar along the top of the screen.

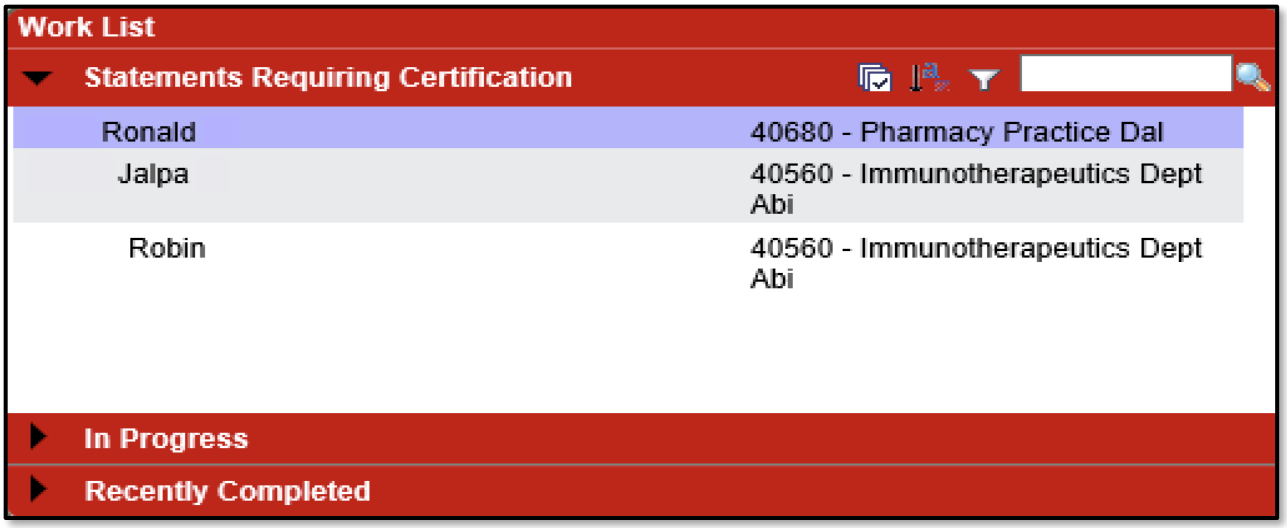


Certify My Statement:

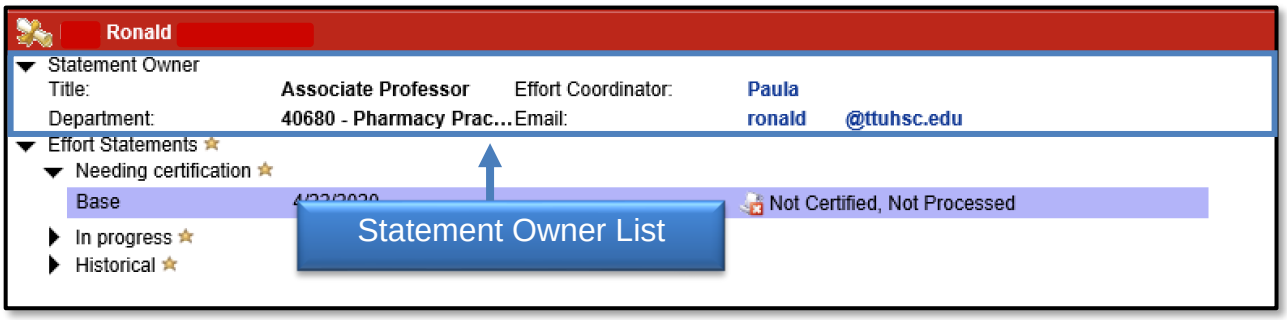
The Effort Statement page displays three panes containing information relevant to the certification process: the Work List pane, the Statement Information pane, and the Effort Statement pane.



The top left pane is the Work List. The Statements Requiring Certification List in this pane shows the PI's name, department number and department name and the same information for all individuals that are currently related to the PI. The PI always appears at the top of this list. Related individuals will appear in the list if they have at least one statement with an uncertified FOP on which the user is the PI. The Recently Completed list shows related people who have effort statements for the current Period of Performance that have been certified.



The top right pane on the Effort Statement is the Statement Information pane. There are multiple expandable/collapsible lists in the pane. The first list is the Statement Owner list. Click the **arrow** to the left of Statement Owner to expand the list. The Statement Owner list displays demographic information about you - your title, the Primary Effort Coordinator, your home department, and your email.



The next list, titled Effort Statements, contains information about all of your statements. A gold star will appear next to the Effort Statements label if there are any statements for you. The statements in the Effort Statements list are grouped into three additional lists. The first list is the Needing Certification list which contains any statements in a Not Certified, Not Processed status. The certification due date (which is the end date of the Certification Period) and the status of the statement are displayed.

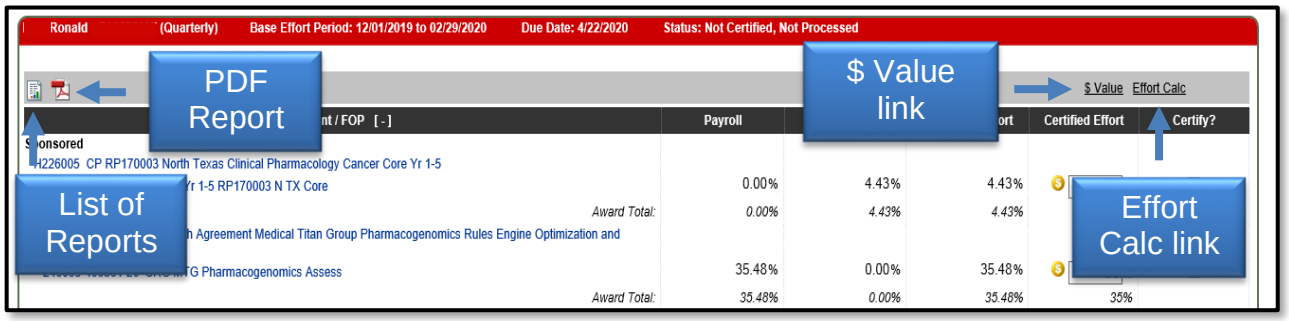
The second list is the In Progress list. The In Progress list contains any statements in the Certified, Not Processed status or Effort Statement Building status.

The third list is the Historical list. The Historical list contains statements from any previous period. The statements are listed in ascending order, and you can view any historical statement by clicking on the statement status link.

The third pane displays your effort statement. The Effort Statement Header displays your name and R number, the employee type, statement type, Period of Performance dates, the due date, and the status of the statement.

Below the header is the Message Box that will under certain circumstances display information about the statement. Below the Message Box is the Statement Action Bar, which is an area that contains a variety of icons and links that allows you to perform certain actions:

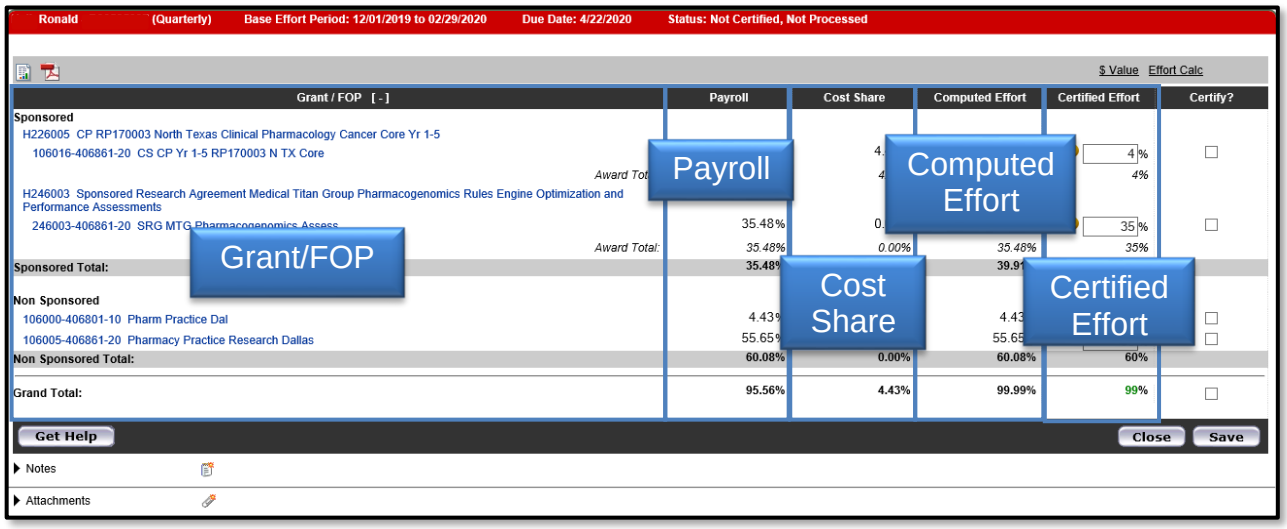
- The List of Reports icon allows you to run selected reports to which you have access that contain more information about the data on the effort statement.
- The PDF Report icon generates the Effort Statement PDF that is used for a Manual Certification.
- The $ Value link displays the payroll dollars underlying the percentages on the effort statement. Remember you can't certify in $ Value mode.
- The Effort Calc link is a tool that calculates a percentage of effort based on an input of average hours worked.



The body of the effort statement contains the data that is critical to your certification. The Grant/FOP column displays a list of all the Grants/FOPS that you were paid from. The Payroll column shows the percentage that you were paid from a FOP for the period. The Cost Share column shows the total cost share recorded for you for that FOP for the period. The Computed Effort column shows the sum of the Payroll and Cost Share columns. This is your total effort for the period.

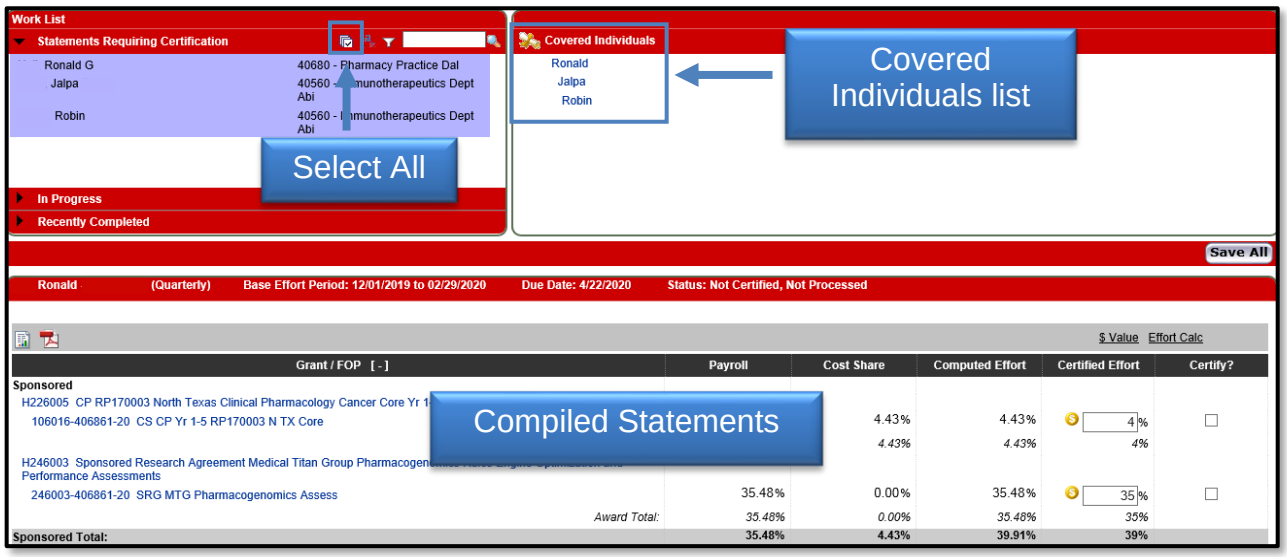
Before you certify it is critical that you review all of the FOPs on your statement and confirm that your effort is correctly documented. The Certified Effort column is where

you can make adjustments to your effort. It is pre-populated with a best guess based on your payroll distribution, but you should certify based on how you actually spent your time. To change a percentage, select the **Certified Effort** box and enter the **percentage of effort** you spent on the FOP.

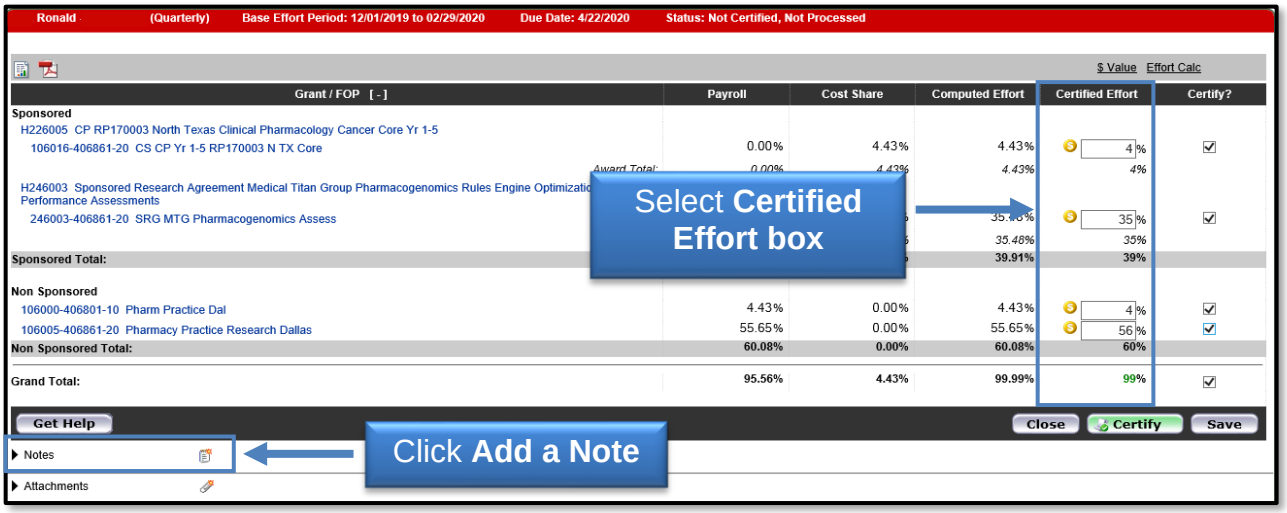


The PI has the ability to select all the related people in the Statements Requiring Certification list at one time. This tool is most useful when the PI wishes to review and/or certify multiple statements at one time. The Select All icon is the first icon to the right of the Active label.

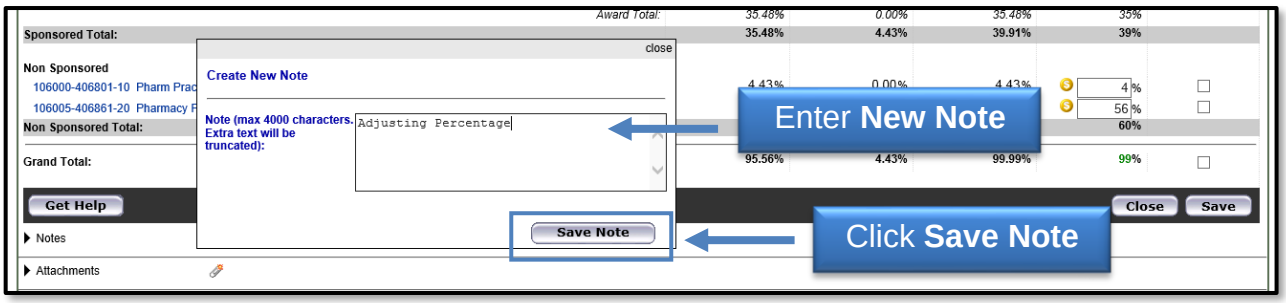
Selecting this icon highlights all the people in the Active list that have statements that are in a Not Certified status. The selected individuals are loaded in the Covered Individuals list in the top right pane. The PI can review and certify all available lines on the Not Certified statements, which includes their own statement and those for related individuals. Scroll down the page to review the statements.



If during this review, you need to change a percentage, select the **Certified Effort** box and enter **the percentage** of effort that was actually spent on the FOP. When you do make changes to your effort, it is helpful to leave a note describing your changes in the Notes section. To leave a note, click the **Add a Note** icon.



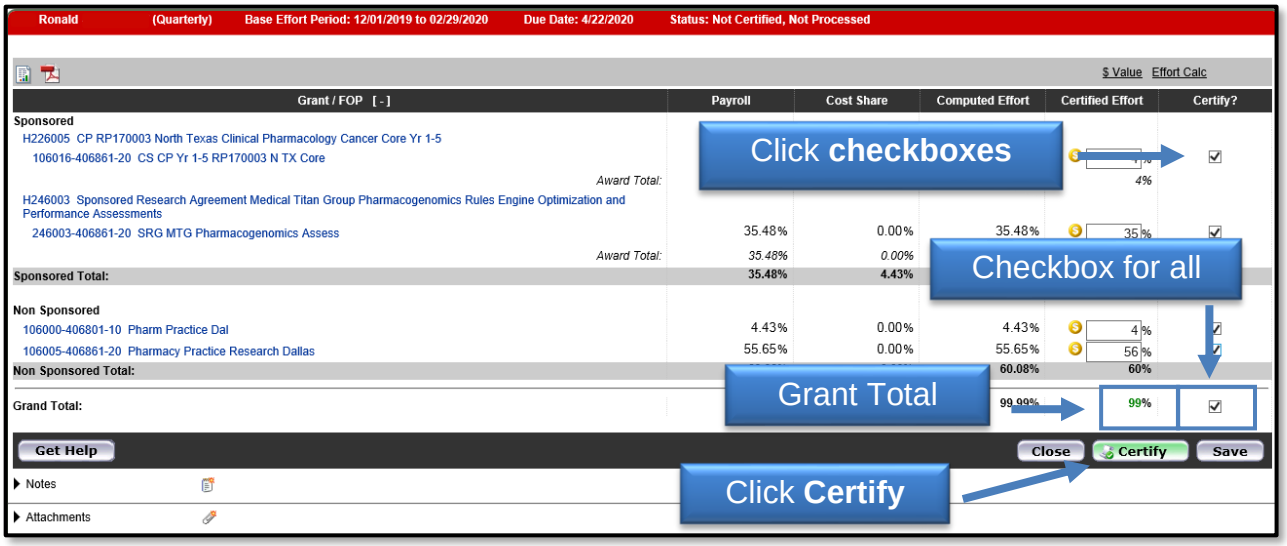
Enter your note in the **Create New Note** text box and click **Save Note**.



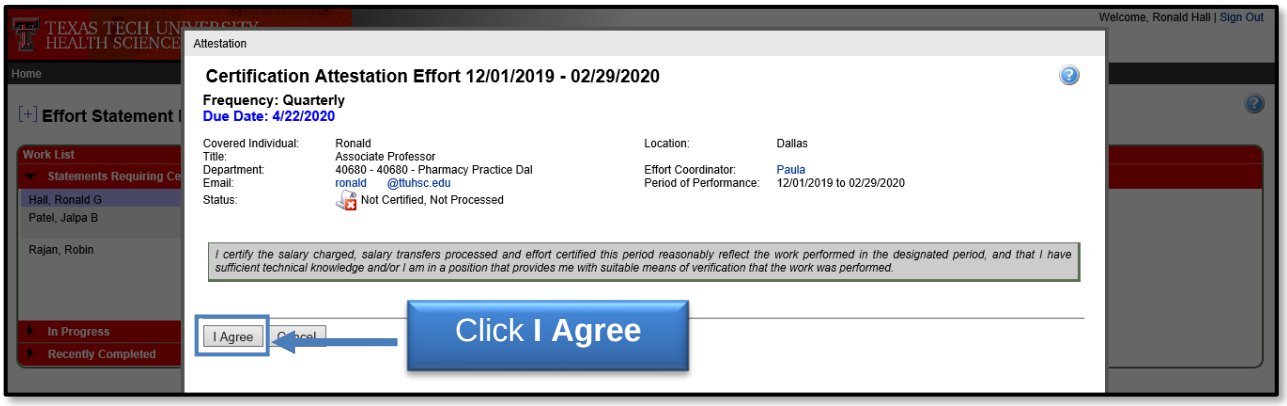
The Grand Total of the Certified Effort Column must be between 99% and 101% for each effort statement you are reviewing. When you are comfortable with how the effort percentages are documented, click the **Certify Checkbox** for each line or select the **checkbox for all** located at the bottom of the certification lines.

The Certify Checkboxes must be checked in order to certify that line of the effort statement. After you have reviewed all lines of all the statements and are ready to certify, click the **Certify** button.

Certify My Statement in ecrt - PI Role



Review the Legal Attestation text and consider the effort that you are certifying. If you agree with the statement, click the **I Agree** button.



After you have certified, the In Progress List will update the status of your statement to Certified, Not Processed. Your effort statement has been routed to the effort coordinator for processing.

For help with ecrt system navigation or questions regarding this training document, please contact the Central Administrator at EffortReporting@ttuhsc.edu.