ECRT Process for Effort Coordinators

Pre-Review Period

- Review the list of personnel for your organization(s) to make sure that all current employees are listed. Check for employees listed in the ‘Non-sponsored’ section who you believe should be listed under ‘Sponsored’.

- Review all effort cards to see if any contain ‘Suspense’ entries. In the past, Suspense entries that have been cleared in the GL have not always been cleared in ECRT. If you discover any erroneous Suspense entries in ECRT (i.e., ones already cleared on the GL), please contact the PACER Group at PACER@RCI. If you discover any legitimate Suspense entries in ECRT, please process commitment accounting changes ASAP to clear them on the GL. You should also alert the PACER Group to this so that they can make sure that the Suspense in ECRT is cleared once your commitment change has hit the GL.

- Try to identify problems early, and contact PACER as soon as you identify a problem. This will improve your chances of a quick response. Be very specific in describing problems in your correspondence to PACER. Provide full names, EMPL IDs, etc. More (info) is better.

- Check effort cards for missing accounts (including cost-share accounts) that will need to be certified. Submit IPAS requests ASAP (if you haven’t already done so) for accounts that you know will have to be certified during this period.

- Add any recent “HOLD” accounts to all applicable effort cards where effort was expended on awards but payroll charges have not yet been posted.

- Note ... If you manually change the certified percentage for account(s) on an effort card during the ‘Pre-review’ period (i.e., before the PI is allowed to certify the card), and then a Commitment Change and/or SWRJ posts subsequent to your manual changes, the certified effort you entered will be changed back to match the new computed effort on the card, overriding the changes you made during the ‘Pre-Review’ period. Make notes of needed changes during the ‘Pre-Review’ period, but make your certification changes during the ‘Certification Period’.

- Identify the employees in your organization whose effort card includes account(s) that will need to be certified by a PI (or PIs) outside of your organization. Make a list of these effort cards for your use during the Certification Period.
Certification Period

- Send out an e-mail to all of your PIs letting them know that the Certification Period has begun, and that they should be receiving an e-mail directly from DGCA notifying them of this. In your e-mail to them make it clear that they (the PIs) should not certify any effort card until they have heard back from you. Explain that you need to review all effort cards for accuracy prior to their certification.

- Begin the review of the effort cards for the employees in your organization. Start with those employees whose card will require certification by a PI (or PIs) outside of your organization. This is especially important if the PI is not from the Bloustein School. Contact the effort coordinator who will need to facilitate the certification early on to allow outside PIs as much time as possible to certify effort for these cards.

- Some effort cards continue to include 'blended' payroll, which is a mix of regular salary subcodes (12000 and 12600) and non-salary (hourly pay) subcodes. The ECRT Team was supposed to be addressing this, so that separate effort cards were created for salary and non-salary, but I’m not sure if this has been corrected. In recent ECRT cycles, PACER has instructed us to certify the salary effort only, and enter 0% effort for all accounts reflecting non-salary payroll on these ‘blended’ payroll cards. They further instructed us to include an ‘Effort Note’ on the card which clearly explained the certification methodology for the card in question. If you discover any of these during the ECRT cycle, please confirm with PACER that they still want these cards certified in this fashion.

- Non-salary (hourly) effort cards do NOT have to be certified. If you discover any that are listed as requiring certification, please notify PACER and they will process them for you.

- If you encounter the 'yellow screen' error, remember to use the 'lookup' (for person) function to access cards that initially display a yellow screen.

- Please make sure to check that all effort cards for your organization(s) have been certified. Use Internet Explorer, run the ‘Certification Status Report’, selecting the following statuses … Manual Certification Required, Certification Required, Recertification Required, and Recertification Required due to Cost Transfer. If that report comes back clean, please double-check by looking at the Certification Summary at the top of your Organization Dashboard to confirm that there are no cards that need to be certified.