Effort Task guide

There are two different kinds of task a primary effort coordinator may encounter, the first is a payroll adjustment task, and the second is a process certification statement task. This guide will walk you through the differences between the two kinds of tasks, and the options for processing each task. Primary effort coordinators should process all tasks within 5 business days of receipt.

Payroll Adjustment Tasks

A Payroll Adjustment task will be created after an effort report has been certified, and a retroactive funding adjustment (RFA) has been processed that effects the certified effort report.

When opening a payroll adjustment task you will see a two key pieces of information, the original certified % and the new computed effort%, comparing these two will give you a sense of how much the RFA has effected the certified effort. However, due to the fact that payroll at the university can only be corrected through the RFA process after reviewing the payroll adjustment task you can only choose to post and re-open the effort report. The system will calculate whether or not change to effort is under or above the threshold (5% and $100.00 per line), if the change in effort is under the threshold, it will not open the report and the certifier will not be notified. If the change in effort is over the threshold, after the statement is re-opened the certifier will receive a notification that their effort report has been re-opened and requires rectification. (Note, ecrt keeps track of all RFAs previously submitted when making threshold decisions, therefore if the transaction you are
looking at independently does not meet the threshold but in combination with a previously processed RFA it would take the employee over the threshold the report would be re-opened)
Process Certification Statement Tasks

A process certification statement task will be created when a certifier has changed their certified effort over the threshold of 5% and $100.00. Note to be considered over the threshold the change must meet both requirements, therefore a change in effort that equates to 20% but only effects $40.00 payroll dollars would not be considered over the threshold and would not create a process certification statement task.

When opening process certification statement task you will see two key pieces of information the computed effort and the certified effort, highlighted below with a black box. This type of task is generated when a certifier certifiers their effort at a different value than the computed effort. The effort can be changed either by the effort coordinator and/or the certifier themselves. Ecrt will calculate whether or not the change in effort is over the 5% & $100.00 threshold. If the change in effort is over the threshold a task will be generated for the primary effort coordinator to review.

There are three options on how to process a process certification statement, Cancel, RFA Needed, or Do Not Process.

Cancel this option will take you back to the home page and allow you to return to the task at a later date.

RFA Needed should be selected if the change in effort is alignment with expectations and there is either already an RFA in process or you will be initiating an RFA to bring payroll dollars in line with effort. After this option is selected, the report will be placed in the Certified, Approved, RFA Needed status; it will remain in this status until the RFA is processed. Note, the RFA will need to bring the effort report within the threshold (5%, $100.00) to move the report to complete status.
Do Not Process should be used if you believe the change in certified error was made mistakenly, this option will return the report back to the certifier for re-review. It is advised to leave detailed notes for the certifier when using this option so they understand why they are seeing the report for a second time, and what might have caused the initial confusion.