Effort Coordinator: Pre-Review
What is Pre-Review?

• As an Effort Coordinator, you can access ecrt at ANY TIME to review effort statements that have been updated during the most recent (daily) data loads.

• It is in the Effort Coordinator’s best interest to be proactive in monitoring effort statements as the Effort Coordinator will need to coordinate necessary adjustments in the source system, when corrections are needed.

• **Pre-Review** is a designated period for the Effort Coordinator to review the biannual effort statements AFTER the designated effort period has ended but BEFORE they are released for certification.
When the Effort Coordinator starts his/her pre-review process the Effort Coordinator should ask: Do I know specific statements that I want to review or do I want a list of everyone in my department that I can work through?

If the Effort Coordinator has specific individuals the Effort Coordinator wants to review, use the Search Bar to easily navigate to their statements. But if the Effort Coordinator wants to see a list of everyone in his/her department, use the Department Dashboard. The Associated Certifier tab will not populate with statements until AFTER the Certification Period has started.
The Department Dashboard presents information that an Effort Coordinator needs to manage the effort certification process, divided into three tabs: People, Award and Account, and Department Information.

The People tab is where the EC will spend the most time. The Certification Summary Chart gives the number of statements in each status for a certification period. The EC can select a different period with the drop down menus.

Every effort statement in the system is tagged with a particular status, which changes as it moves through the certification process.
Below the summary chart is a list of all of the individuals associated to the department divided into three groups – those employees that have Sponsored Activity, those that have only been paid from Non-Sponsored accounts that do not require certification, and Terminated individuals (individuals who have left the institution).

Expand each of the three lists to see details about the individuals, including their employee type, role, employee ID, and a link to their most recent effort statements.

The action column can be used to navigate to the individual’s Manage Users page (using the Magnifying Glass icon) or to send the individual an email (using the Pen/Envelope icon).
When the Effort Coordinator hovers over a statement icon in the Statements column, a pop-up window gives the Effort Coordinator details of the dates and status of the statement. Click the link in the pop-up to go to that statement or click any other area inside the pop-up to close the window.

The Effort Coordinator can right-click on the statement icon and click “Open in a New Tab” to use an additional window to perform the Effort Coordinator’s review. This is helpful as it allows the Effort Coordinator to keep the department dashboard page populated while working on the selected statements.
An individual’s certification page is made up of 3 windows. The top left window is this Work List – this will list the name of any individual who the Effort Coordinator is responsible for certifying.
Effort Certification
Certification Page

The top right window populates with information specific to that individual.

In addition to some basic information on the individual, the top left window displays effort statements divided into three lists: Requiring Certification, In Progress, and Recently Completed.
Effort Certification

Certification Page

The system will automatically display the most recent open statement of the individual. If the Effort Coordinator wants to display more than one statement (the statement from the last period to compare against this year’s current statement) the Effort Coordinator can simply hold down Control and click multiple statements in the upper right window, and each will display in the window below.
When selecting multiple effort statements, the Effort Coordinator can access the additional statements by scrolling to the bottom of the screen.

When a new statement is loading, a message will appear at the bottom of the screen.(Please wait for the next statement to load...)
During Pre-Review the Effort Coordinator should focus on confirming that the individual’s statement accurately reflects the work that was performed for the period.

If the Payroll or Cost Share Columns need to be updated: Review payroll distribution for the individual and process an RFA to correct the distribution. If this RFA will not be processed in time for the certification period, adjust the percentages on the effort statement and save the statement. Leave a note to document the change that the Effort Coordinator has made.
Effort Certification
Saving Changes and Leaving Notes

Click on the **Notes** icon at the bottom of the statement to leave a note. After the Effort Coordinator enters text and clicks **Save Note**, the note can be viewed by expanding the **Notes** section.
Effort Certification
Certification Page

If a statement is missing a grant, you can select the Add Chart String link. Enter the chart string, click submit, and the page will refresh. The individual will be able to certify effort on that chart string.

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