



Colorado State University

OFFICE OF
SPONSORED PROGRAMS

ecrt[®]

Effort Coordinator User Guide

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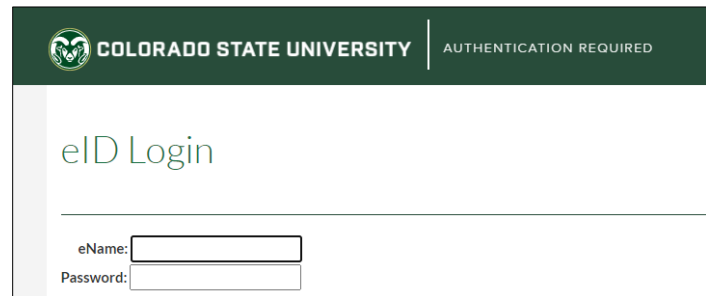
NOTE: The terms **Effort Coordinator** and **Grant Manager** are used interchangeably throughout the ecrt/ECC application. These two terms mean the same thing with regard to project statement access, review, and actions.

A. Logging into ecrt

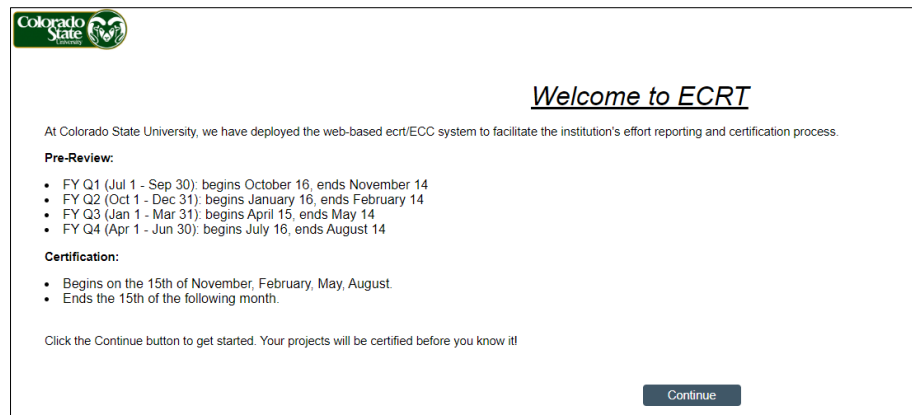
Please note: Project statement information in ecrt is available to review at any time. The only time a department effort coordinator can take action in a statement is during the Pre-Review period.

Primary/Secondary Department Effort Coordinators (Grant Managers) and Principal Investigators will receive automated emails from the system once the Pre Review and Certification Periods begin. The emails will provide a link to the system and may prompt the user to enter in their CSU login credentials.

When clicking a link, users will be prompted to login with CSU eid and password.



After successful login, click the 'continue' button to enter the ecrt site:



Welcome to ECRT

At Colorado State University, we have deployed the web-based ecrt/ECC system to facilitate the institution's effort reporting and certification process.

Pre-Review:

- FY Q1 (Jul 1 - Sep 30): begins October 16, ends November 14
- FY Q2 (Oct 1 - Dec 31): begins January 16, ends February 14
- FY Q3 (Jan 1 - Mar 31): begins April 15, ends May 14
- FY Q4 (Apr 1 - Jun 30): begins July 16, ends August 14

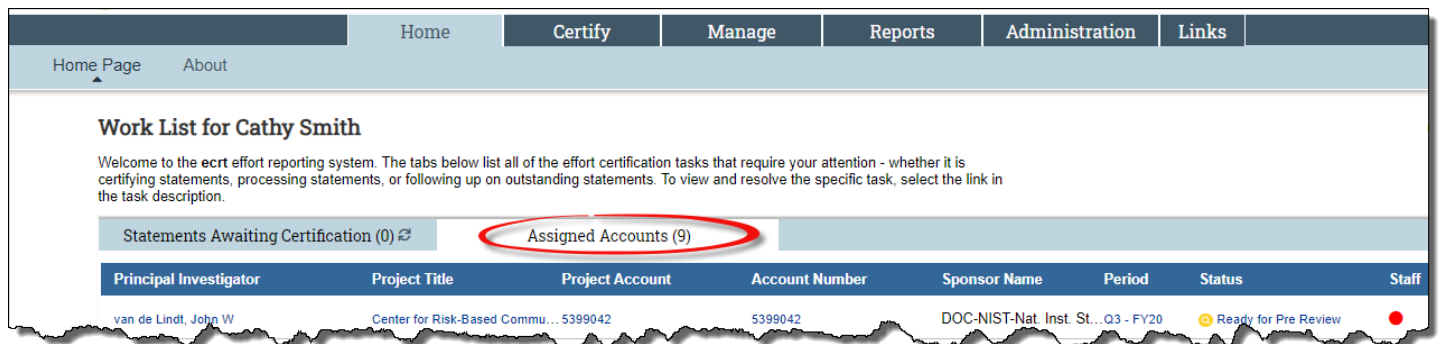
Certification:

- Begins on the 15th of November, February, May, August.
- Ends the 15th of the following month.

Click the Continue button to get started. Your projects will be certified before you know it!

[Continue](#)

The system will open on the **Home Page**, with two tabbed sections. Unfortunately, by default the user lands in the Statements Awaiting Certification tab, which will be blank. DEC's need to navigate to the **Assigned Accounts** tab to see their list of statements for assigned accounts.



Work List for Cathy Smith

Welcome to the ecrt effort reporting system. The tabs below list all of the effort certification tasks that require your attention - whether it is certifying statements, processing statements, or following up on outstanding statements. To view and resolve the specific task, select the link in the task description.

Statements Awaiting Certification (0) [Assigned Accounts \(9\)](#)

Principal Investigator	Project Title	Project Account	Account Number	Sponsor Name	Period	Status	Staff
van de Lindt, John W	Center for Risk-Based Commu...	5399042	5399042	DOC-NIST-Nat. Inst. St...	Q3 - FY20	Ready for Pre Review	

To see more information, go to the Department Dashboard.

B. Understanding the Department Dashboard

The department dashboard is for the Department Effort Coordinator to review and manage the accounts and awards associated to their department(s).

Under the Manage tab on the navigation bar, select Department Dashboard from the sub-menu:

The screenshot shows the top navigation bar with tabs: Home, Certify, Manage, Reports, Administration, and Links. The 'Manage' tab is highlighted with a red box. Below it, a sub-menu is open, showing 'Look-up' and 'Department Dashboard' (highlighted with a red box). The 'Department Dashboard' option has a small upward arrow next to it. Below the sub-menu, the 'Department Dashboard' page is visible, featuring a search box labeled 'Search for Department :', a dropdown menu, and a 'Choose' button.

The Department Effort Coordinator will only have access to their assigned department(s).

Select a department from the drop down menu and select Choose.

This screenshot shows the 'Department Dashboard' page. The search box is labeled 'Search for Department :'. A dropdown menu is open, showing a list of departments: 'Atmospheric Science' and 'Chemical + Biological Engineering'. The 'Choose' button is highlighted with a red box.

Please note: The search box in this view uses **Department name**, not the department number (i.e. CO-####).

This screenshot shows the 'Department Dashboard' page with the search box containing the text 'foo'. The dropdown menu is open, showing a list of departments starting with 'CO-1571- Food Science + Human Nutrition'. The 'Choose' button is highlighted with a red box.

The Department Dashboard appears.

The screenshot shows the 'Department Dashboard for Chemical + Biological Engineering - CO-1370'. The page includes a navigation bar with tabs: Home, Certify, Manage, Reports, Administration, and Links. The 'Manage' tab is highlighted. Below the navigation bar, the 'Department Dashboard' page is visible. The page title is 'Department Dashboard for Chemical + Biological Engineering - CO-1370'. Below the title, there is a search box labeled 'Search for Department :', a dropdown menu, and a 'Choose' button. The page is divided into sections: 'Project Certifications', 'Award and Account', and 'Department Information'. The 'Project Certifications' section is highlighted with a red box. It contains a 'Project Certification Summary Chart' with filters for 'Employee Type' and 'Period'. Below the chart, there is a table showing the status of project statements. The table has columns for 'Status', 'Count', and 'Percentage'. The data is as follows:

Status	Count	Percentage
Auto Approved	8	57.143%
Ready for Pre Review	14	100.000%

Below the table, there is a section for 'Project Statements' with a search box and a 'Project Statements' table. The table has columns for 'Project Nickname', 'Project Number', 'Grant Manager', 'PI', 'PI Department', 'Statements', and 'Action'. The data is as follows:

Project Nickname	Project Number	Grant Manager	PI	PI Department	Statements	Action
Chemical Engineering	1254000	Foster, Steven - 828287321	N/A	N/A	1	View

The **Project Certifications tab** includes the Project Certification Summary Chart and Project Statements sections. **Project Certification Summary Chart** - When first accessing the page, the chart shows the statistics for all statement types and all employee types for the most recent Period of Performance. To see the statistics for a period, search for employee type under Quarterly and the Period of Performance from the drop-down lists.

Department Dashboard for Electrical + Computer Engineering - CO-1373

This page contains all the information relevant to the department, including all statements, information about projects, and information about administrators for this department.

Search for Department :

Project Certifications

Award and Account












Department Information


Project Certification Summary Chart: Employee Type Period





The default search is for project statements for all projects in this Department, for the current period of performance

Note: Search for employee type Quarterly

The chart shows only those statuses that apply to statements for that period. For reference, here is a list of statuses:

Project Statement Statuses	
	Auto Approved
	Revision Requested
	Revision Pending
	Building (not yet ready for certification)
	Ready for Pre Review
	Pre Reviewed
	Ready for Certification
	Certified
	Certified, PAR Pending
	Ready for Certification, Re-Opened by Payroll Adjustment
	Ready for Certification, Re-Opened

 Send emails to ALL individuals that have a statement of the selected status type for the selected Period of Performance by clicking the envelope icon next to the status.

Status
 Auto Approved 
 Ready for Pre Review 

The subject and body of the email are configurable. After composing the email, click Send the Email. Email recipients can be Statement Owners (which includes PIs and Effort Coordinators), All ECs (only Effort Coordinators) or Only PIs (only Principal Investigators). The email will route to the designated recipients with a statement in the status selected from the Project Certification Summary Chart.

Send Email to Certifiers





close





Subject:



Destination:






☒ Statement Owners ☐ All ECs ☐ Only PIs



Message:


































Styles

Format

Send the Email

Project Statements section – This section lists all project statements associated to the department.

Project Statements <input type="text"/> <small>(If you would like to search for an apostrophe, please enter two apostrophes to return results)</small>						
Project Nickname	Project Number	Grant Manager	PI	PI Department	Statements	Action
Accurate Characterization of Winter Precipitation Using Multi-Angle Snowflake Camera, Visual Hull, Advanced Scattering Methods, and Polarimetric Radar	5300006	Savig, Kristine - 822077761 	Notaros, Branislav - 825790134	Electrical + Computer Engineering	   	 
Temporal Experiment for Storms and Tropical Systems (TEMPEST)	5300091	Kerr, Joan - 823193337  	Reising, Steven - 822128700	Electrical + Computer Engineering	   	 
Temporal Experiment for Storms and Tropical Systems	5300092	Kerr, Joan - 823193337  	Reising, Steven - 822128700	Electrical + Computer Engineering	   	 

Under the Statements column, hover over the icons to view the project statements' PI, period of performance and current status.

Project Nickname	Project Number	Grant Manager	PI	PI Department	Statements	Action
Accurate Characterization of Winter Precipitation Using Multi-Angle Snowflake Camera, Visual Hull, Advanced Scattering Methods, and Polarimetric Radar	5300006	Savig, Kristine - 822077761	Notaros, Branislav - 82579013	Electrical + Computer	Oct 1 2018 to Dec 31 2018 Revision Requested	
High Speed Single Pixel Hyperspectral Spatial Frequency Domain Imaging	5300068	Savig, Kristine - 822077761	Bartels, R			
Collaborative Research: Defect	5300000	Stine Meiers-Kruse	Marcini A			

The list can be filtered by name, number, sponsor, or PI. Click the filter icon, select the filter type, then type the project name, number, PI or Grant Manager in the search field. Click the magnifying glass to search.

Project Statements (If you would like to search for an apostrophe, please enter two apostrophes to return results)

Status	Select filter type:		
<input checked="" type="checkbox"/> Auto Approved	<input type="radio"/> Nickname		24 48.000%
<input checked="" type="checkbox"/> Ready for Pre Review	<input type="radio"/> Number		48 96.000%
<input checked="" type="checkbox"/> Ready for Certification	<input type="radio"/> PI		1 2.000%
	<input type="radio"/> Grant Manager		

Project Statements (If you would like to search for an apostrophe, please enter two apostrophes to return results)

Project Nickname	Project Number	Grant Manager	PI	PI Department	Statements	Action
Electrical Engineer		Savig, Kristi - 822077761	N/A	N/A	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/>	
Departmental Academic Administration		Savig, Kristi - 822077761	N/A	N/A	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/>	
Electrical Engineering		Savig, Kristi - 822077761	N/A	N/A	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/>	
ECE Default Salary Account		Savig, Kristi - 822077761	N/A	N/A	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/>	

The page will display the results from the information entered in the filter field. In this example, the filter type is Grant Manager; the filter text is 'savig'.

Status	Select filter type:		
<input checked="" type="checkbox"/> Auto Approved	<input type="radio"/> Nickname		24 48.000%
<input checked="" type="checkbox"/> Ready for Pre Review	<input type="radio"/> Number		48 96.000%
<input checked="" type="checkbox"/> Ready for Certification	<input type="radio"/> PI		1 2.000%
	<input checked="" type="radio"/> Grant Manager		

Project Statements (If you would like to search for an apostrophe, please enter two apostrophes to return results)

Project Nickname	Project Number	Grant Manager	PI	PI Department	Statements	Action
Electrical Engineer		Savig, Kristi - 822077761	N/A	N/A	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/>	
Departmental Academic Administration		Savig, Kristi - 822077761	N/A	N/A	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/>	
Electrical Engineering		Savig, Kristi - 822077761	N/A	N/A	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/>	
ECE Default Salary Account		Savig, Kristi - 822077761	N/A	N/A	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/>	

The **Award and Account tab** contains all the awards and accounts that are assigned to the department, whether active or inactive, in a single list. All the columns are sortable.

Project Certifications		Award and Account	Department Information			
Filters		<input type="text"/>				
Award Number	Account Number	Name	Sponsor	PI	Start Date	End Date
008024	5301888	2018 Hurricane Season: Social and Engineering Constructs for Uniquely Re-Energizing (SECURE) Hurricane-affected Grids: A Post-Hurricane Michael Effort on Designing Resilient Microgrids	002684 - NSF-National Science Foundation	Sid Suryanarayanan	06/01/2019	05/31/2020
008024		2018 Hurricane Season: Social and Engineering Constructs for Uniquely Re-Energizing (SECURE) Hurricane-affected Grids: A Post-Hurricane Michael Effort on Designing Resilient Microgrids	002684 - NSF-National Science Foundation	Sid Suryanarayanan	06/01/2019	05/31/2020

This icon indicates the project end date has passed and is now considered inactive in ecrt.

Note: The project may **not be** inactive in KFS.

The **Department Information tab** contains the information about the department's Effort Coordinators, and the department organizational tree.

Department Dashboard for Electrical + Computer Engineering - CO-1373

This page contains all the information relevant to the department, including all statements, information about projects, and information about administrators for this department.

Search for Department :

Choose

Project Certifications

Award and Account

Department Information

Department Basic Information:

Name:Electrical + Computer Engineering





































Description:

Active:Yes

Type:Code:

CO-1373

Department Effort Coordinator(s)


Name	Address	Phone	Email	Action
Chapman, Rachel S - 831802518			rachel.chapman@colostate.edu	  
Coleman, Ashlie J - 830246390			ashlie.coleman@colostate.edu	  
Devlin, Brenda L - 822601907			brenda.devlin@colostate.edu	  
Foster, Steven D - 828287321			steve.foster@colostate.edu	  
Foster, Jordan N - 831181639			jordan.foster@colostate.edu	  
Hunn, Liza P - 824122034			liza.hunn@colostate.edu	  
Kerr, Joan E - 823193337			joan.kerr@colostate.edu	  
LeFebvre, Valerie M - 824463627			valorie.lefebvre@colostate.edu	  
Reese, Melissa D - 829307403			melissa.reese@colostate.edu	  
Savig, Kristine - 822077761			kristi.savig@colostate.edu	  
Smith, Cathy Z - 821019935			cathy.smith@colostate.edu	  
Stine-Majors, Krysta M - 821882706			krysta.stine-majors@colostate.edu	  


Add


Viewer(s)


Name	Address	Phone	Email	Action
None found				


Department Relationships


 Engineering (Walter Scott, Jr. (SCOE) (N/A))


 Dean of Engineering (Logan David L - 829296119)


 Engineering Research Center (N/A)

 Chemical + Biological Engineering (Foster Steven D - 828287321)

 Atmospheric Science (Packard Heather L - 820205639)

 Civil + Environmental Engineering (Burke Rebecca A - 821516081)

 Electrical + Computer Engineering (Savig Kristine - 822077761)

 Mechanical Engineering (Chen Martin Kevin H - 821583726)

The Primary Department Effort Coordinator is highlighted. There can only be one Primary Department Effort Coordinator per department.

There may be multiple people listed under the Department Effort Coordinators section. This does not mean the person has the rights to perform the actions of a Department Effort Coordinator. The person may have a different role associated to the department.

Grant Manager (Effort Coordinator) Reassignments

By default, the Primary Effort Coordinator (PEC) is assigned as the Grant Manager for all projects. If another person needs to manage a project within the department, they need to be assigned as the **Grant Manager (Secondary Effort Coordinator)**. This means you are overriding the current Grant Manager (i.e. the PEC).

The **Grant Manager (Secondary Effort Coordinator)** will receive an automated e-mail from ecrt assigning them the task to Pre Review the project statements for which they were assigned. These tasks will appear under the Assigned Accounts tab on their Home Page.

You can update the Grant Manager (Secondary Effort Coordinator) by navigating to the department dashboard and selecting the Project Certifications tab.

Revised (minor updates) by C Carsten, CSU, June 2022

To assign a Grant Manager (Secondary Effort Coordinator) Override, the user selects the plus (+) icon next to the current Grant Manager (Secondary Effort Coordinator)'s name.

This brings up a search field where the user can search for an individual to assign as a Grant Manager (Secondary Effort Coordinator) Override for that project.

The screenshot displays the 'Project Certifications' tab with sub-tabs for 'Award and Account' and 'Department Information'. A 'Project Certification Summary Chart' section includes filters for 'Employee Type' and 'Period'. Below this, a 'Status' section lists 'Auto Approved', 'Ready for Certification', and 'Certified' with corresponding icons. A 'Project Statements' section features a search field. A modal window titled 'Enter Grant Manager Override:' is open, showing a search input and a save icon. In the background, a table lists project details, including 'Accurate Characterization of Winter Precipitation Using' with project number '5300006' and current manager 'Savig, Kristi - 822077761'. A red circle highlights the plus icon next to the current manager's name.




When a Grant Manager (Secondary Effort Coordinator) Override has been assigned, a red minus (-) will be displayed next to the plus icon.

This close-up shows the 'Loeser, Krysta - 821662730' entry in the override list. It includes a plus icon and a red minus icon, indicating that an override has been assigned.


Clicking on the  icon removes the current Grant Manager (Secondary Effort Coordinator) Override.

Note: This icon only appears when a Grant Manager (Secondary Effort Coordinator) Override has been assigned.

You can also add a Grant Manager (Secondary Effort Coordinator) from the **Account/Award Summary** page:





Project Certifications		Award and Account	Department Information
Filters  <input type="text"/>  			
Award Number	Account Number	Name	PI
008024	5301888	2018 Hurricane Season: Social and Engineering Constructs for Uniquely Re-Energizing (SECURE) Hurricane-affected Grids: A Post-Hurricane Michael Effort on Designing Resilient Microgrids	Sid Suryanar...












"Name" is a hyperlink that opens the Account Summary information in a new tab

Account Summary			
Account Name:	2018 Hurricane Season: Social and Engineering Con...	Associated Department(s):	Electrical + Computer Engineering
Account Nickname:	2018 Hurricane Season: Social and Engineering Con...	Award Name:	2018 Hurricane Season: Social and Engineering Con...
Account Number:	5301888	Start to End Date:	06/01/2019 to 05/31/2020
Account Type:	Federal	Account PI:	Sid Suryanarayanan - 829302391 (Primary Effort Coordinator: Kristi Savig - 822077761)
Account Manager:	Kristi Savig - 822077761 (PEC) 		
show more >>			

C. Statement Statuses

The project statement will update to different statuses before, during and after the Certification period.

Project Statement Status	Icon	Description	Role that can perform task
Building (not yet ready for certification)		This status indicates that a Project Statement is not yet ready for certification. This occurs during the Period of Performance, when payroll and profile data are being loaded and the Project Statements are building.	Automatic process
Auto Approved		This status is for project statements that are Auto Approved. The system automatically moves project statements that have no sponsored payroll or cost share associated to them into this status when the certification period begins.	Automatic process
Ready for Pre Review		This status indicates that a Project Statement is ready to be pre reviewed. This status occurs before the statement is released to the PI for certification.	Primary/Secondary Department Effort Coordinator (Grant Manager)
Pre Reviewed		This status indicates that a Project Statement has been pre reviewed by a department administrator.	Automatic process

Ready for Certification		This status indicates that the Project Statement is ready to be certified. Statements move to this status when the Certification Period begins and the statement requires an individual to certify the effort percentages for the period.	Automatic process
Revision Requested		During Pre Review, when a Department Effort Coordinator clicks the Revise Payroll button, indicating a payroll adjustment is needed. During the Certification Period, after a PI clicks the Revise Payroll checkbox and inputs a payroll and/or cost share percentage, they click the Revise Payroll button which updates the project statement status to this.	PI (Certifier) Primary/Secondary Department Effort Coordinator (Grant Manager)
Revision Pending		When new payroll loads into ecrt and creates a payroll task - both during the Pre Review period and Certification Period	Automatic process
Certified		This status indicates that an individual certified his/her Project Statement.	PI (Certifier)
Certified, PAR Pending		This status indicates that an individual certified his/her Project Statement and a payroll transaction occurred after the fact. The payroll transaction creates a PAR (Payroll Adjustment Reconciliation) task and the project statement remains in this status until an administrator completes the PAR task.	Automatic process
Manual Certification		This status is when a project statement has been marked as Manual Certification	Functional System Administrator (OSP)
Manual Certification, Payroll Pending		This status is when a project statement has been marked as Manual Certification and an additional payroll transaction has been loaded to this project statement, which needs to be reviewed and posted to the statement	Automatic process
No Certification Required		This status is when a project statement has been marked as No Certification Required	Functional System Administrator (OSP)
No Certification Required, PAR Pending		This status is when a project statement has been marked as No Certification Required and an additional payroll transaction has been loaded to this project statement, which needs to be reviewed and posted to the statement	Automatic process
Ready for Certification, Re-Opened by Payroll Adjustment		This is the status of a project statement where a payroll transaction was applied and the statement needs to be re-certified by the individual due to changes in the payroll percentages and/or dollars on the project statement.	Functional System Administrator (OSP)
Ready for Certification, Re-Opened		This is the status of a project statement that has been re-opened and statement needs to be re-re-certified	Functional System Administrator (OSP)

D. Navigating to the Project Statement

The Primary/Secondary Effort Coordinator (Grant Manager) can navigate to a project statement from their **Home Page** under the **Assigned Accounts** tab.

The screenshot shows the top navigation bar with 'Home Page' and 'About' tabs. Below it, the 'Work List for' section displays 'logged in user's name here'. A welcome message follows: 'Welcome to the **ecrt** effort reporting system. The tabs below list all of the effort certification tasks that require your attention - whether it is certifying statements, processing statements, or following up on outstanding statements. To view and resolve the specific task, select the link in the task description.' At the bottom, there are three tabs: 'Statements Awaiting Certification', 'Pending Payroll Tasks (1)', and 'Assigned Accounts (8)'.

If you do not have any assigned accounts, there are multiple ways to navigate to a project statement.

The **Look-up Page** is located in the sub-menu under the Manage tab on the navigation bar. Any user with access to the Look-up Page can search for departments and projects associated to them.

Enter a project number or project name or department name in the Search box. In this example, we will look-up a project.

The screenshot shows the 'Look-up Page' interface. It includes a navigation bar with 'Home', 'Certify', 'Manage', 'Reports', 'Administration', and 'Links'. The 'Look-up' sub-menu is active under 'Manage'. The page title is 'Look-up Page'. A description states: 'The Look-Up page allows you to search for Employee, Award(s), Account(s), or Department(s). After at least three (3) characters of the name or number are entered the system displays the possible matches in three separate lists - one for Employee, one for Department, and one for Award and Account. You then can continue to enter data or select a match from the list and be taken to the appropriate page - the Effort statement page, the Department Dashboard, or the Award/Account Summary page. The Award/Account Summary page opens in new browser page. If you enter enough data to return only one result, you will be directed to the appropriate page automatically.' A note says: 'The Enter and Tab keys do not allow selection of data.' There is a search input field labeled 'Enter Search Criteria' and four columns for results: 'Employee', 'Department', 'Active Award / Account', and 'Inactive Award / Account'.

To narrow the suggestions the system generates, enter as much information as possible in the Search Box.

This screenshot shows the search results for the input '536'. The 'Employee' and 'Department' columns are empty. The 'Active Award / Account' column contains several entries, including '5360051 - Remote Monitoring of Natural Source Zone Depletion' and '5360049 - Field Trials for Sensor-Based Groundwater Monitoring'. The 'Inactive Award / Account' column contains entries like '5360031 - Radar Upkeep Concepts' and '5360290 - Algae to Biodiesel - Phase One: Lab and Reactor Design'. A red arrow points from the search input field to the '536' in the first result of the 'Active Award / Account' column.

In this example, searching by partial Account number, results will appear in either the Active Award/Account column or the Inactive Award/Account column.


This screenshot is similar to the previous one but includes a callout box with the text: 'a partial account number will return active and inactive accounts'. Red arrows point from this callout box to the '536' in the search input field and to the '536' in the first result of the 'Active Award / Account' column.

In ecrt, Active Accounts are accounts that have not passed the project end date.

In ecrt, Inactive Accounts are accounts that have passed the project end date.


For searches that return only a single result, or when one of the results is clicked, a new browser tab will open, displaying the **Award/Account Summary Page** for the project selected on the Look-up Page. The Award Summary and Account Summary page contains summary information about the project.

Below the page heading is the general information about the award including the award name, number, amount, sponsor name, sponsor number, the PI and the PI's Primary Effort Coordinator, the start and end dates, among other data.


Account Summary			
Account Name:	Locating NH3 sources and estimating emissions fro...	Associated Department(s):	Atmospheric Science
Account Nickname:	Locating NH3 sources and estimating emissions fro...	Award Name:	Locating NH3 sources and estimating emissions fro...
Account Number:	5366821	Start to End Date:	07/03/2018 to 09/30/2020
Account Type:	Federal	Account PI:	Emily V Fischer - 829995272 (Primary Effort Coordinator: Heather L Packard - 820205639)
Account Manager:	Heather L Packard - 820205639 (PEC) 		
			show more >>

Click the **Show More** hyperlink to display additional project information.

Click on the **Account PI** hyperlink to send an email directly to the PI.

Account Summary			
Account Name:	A Multi-Instrument Cloud Condensation Nuclei Spec...	Associated Department(s):	Atmospheric Science
Account Nickname:	A Multi-Instrument Cloud Condensation Nuclei Spec...	Award Name:	A Multi-Instrument Cloud Condensation Nuclei Spec...
Account Number:	5356991	Start to End Date:	08/01/2016 to 07/31/2020
Account Type:	Federal	Account PI:	Sonia M Kreidenweis - 822121112 (Primary Effort Coordinator: Heather L Packard - 820205639)
Account Manager:	Annette F Foster - 821365028 		
Account Sponsor Name:	DOE-US Department of Energy (Federal)	Account Sponsor Number:	001249
Activity Type:	Research	Account Sponsor Project Number:	DE-0000000SC16051
Field of Research:	C.01 - Atmospheric Science and Meteorolo...	Account Amount:	\$0.00
Sponsor:	DOE-US Department of Energy	Root Award #:	004928
Project Account:	5356991	Cost Sharing Requirement:	<input type="checkbox"/>
Exception Account:	<input type="checkbox"/>	K-Award:	<input type="checkbox"/>
Reportable Status:	<input type="checkbox"/>		
<< show less			

Note: The Account Manager is the Grant Manager (Effort Coordinator) for the project statement. The Primary Effort Coordinator listed next to the Account PI field is the PEC for the Principal Investigator's home department. These two fields may or may not be the same person.

Account Summary			
Account Name:	A Multi-Instrument Cloud Condensation Nuclei Spec...	Associated Department(s):	Atmospheric Science
Account Nickname:	A Multi-Instrument Cloud Condensation Nuclei	Award Name:	A Multi-Instrument Cloud Condensation Nuclei Spec...
Account Number:		Start to End Date:	08/01/2016 to 07/31/2020
Account Type:		Account PI:	Sonia M Kreidenweis - 822121112 (Primary Effort Coordinator: Heather L Packard - 820205639)
Account Manager:	Annette F Foster - 821365028 		

Below the project information are the Associated Project Statements. Here, the Effort Coordinator can view all current and historical statements related to the project.

Project Statements	Covered Individuals	Manage Account Designee
Associated Project Statements		
Period	Project Certification Status	
Q4 - FY19	★ Certified	
Q3 - FY19	★ Certified	
Q2 - FY19	★ Certified	

Click on the period name or status name hyperlink in either the Period or Project Certification Status column to navigate to the project statement.

Another way to navigate to the project statement is through the **Project Certifications** tab on the Department Dashboard.

Department Dashboard for Mechanical Engineering - CO-1374

This page contains all the information relevant to the department, including all statements, information about projects, and information about administrators for this department.

Search for Department :

Project Certifications | Award and Account | Department Information

Project Certification Summary Chart: Employee Type [Select] Period [Select]

The default search is for project statements for all projects in this Department, for the current period of performance

Status: Quarterly

Auto Approved	40	44.944%
Ready for Pre Review	2	2.247%
Ready for Certification	44	49.438%
Certified	42	

Project Statements 53 (If you would like to search for an apostrophe, please enter two apostrophes to return results)

Project Nickname	Project Number	Grant Manager	PI	PI Department	Statements	Action
Next Generation Photovoltaics						
Colorado Space Grant Consortium	5301036	Chapman, Rachel - 831802518	Yalin, Azer - 824250806	Mechanical Engineering	★ ★ ★ ★	
Turbo-Compression Cooling For Ultra Low Temperature Waste Heat Recovery	5301283	Chapman, Rachel - 831802518	Bandhauer, Todd - 830183929	Mechanical Engineering	★ ★ ★ ★	
Ryan Ham, NASA SPACE TECHNOLOGY RESEARCH FELLOWSHIPS (NSTRF) - Fall 2018	5301284	Chapman, Rachel - 831802518	Williams, John - 82230726	Mechanical Engineering	★ ★ ★ ★	
TWO-PHASE EVAPORATOR REDUCED ORDER MODEL DEVELOPMENT FOR FIBER-COUPLED LASER DIODES SYSTEMS	5301493	Chapman, Rachel - 831802518	Bandhauer, Todd - 830183929	Mechanical Engineering	★ ★ ★ ★	
Hyaluronan Enhanced Small Diameter Vascular Grafts	5302365	Chapman, Rachel - 831802518	James, Susan - 822168439	Mechanical Engineering	★ ★ ★ ★	
Collaborative Proposal: Fire, dust, air and water: Improving aerosol	5399011	Loeser, Krysta - 821882706	Bond, Tami - 832706197	Mechanical Engineering	★ ★ ★ ★	

Note: Use the hover over feature to identify the period of performance of the project statement.

Click on any icon under the **Statements** column to navigate to the project statement.

The project statement generates in a new browser tab.

Work List

Novak, Rick A - 829859129
Paustian, Keith H - 821012865

Ready for Certification ★

Pre Reviewed

Ready for Pre Review ★

5391600 Sustainable Biofuel Feedstocks from... Q1 - FY20
5391600 Sustainable Biofuel Feedstocks from... Q2 - FY20

5391600 - Sustainable Biofuel Feedstocks from Beetle-Killed Wood: Bioenergy Alliance Network of the Rockies (BANR)

Project Information

Sponsor: USDA-NIFA-National Institute of Food and Agriculture
Department: CO-1170 - Soil + Crop Sciences
Activity Type: Research
Field of Research: D.01 - Agricultural Sciences - Life Sciences
Project Period: 09/01/2013 to 08/31/2020
Sponsor Award Number: 2013-68005-21298

Project Statement for 5391600: Sustainable Biofuel Feedstocks from Beetle-Killed Wood: Bioenergy A... Effort from 10/1/2019 to 12/31/2019, due date 3/15/2020, Status: Ready for Pre Review

Employee	Department	Object Code	Payroll Dollars	Payroll %	Cost Share Dollars	Cost Share %	Payroll + Cost Share Dollars	Payroll + Cost Share %	Certify	Revise Payroll	Action
Bagdon, Ben - 831389497	Natural Resource Ecology Laboratory...	5111-...	\$0.00	0 %	\$0.00	0 %	\$0.00	0%	<input type="checkbox"/>	<input type="checkbox"/>	\$
Sterle, David - 830225103	Western Colorado Research Center - ...	5111-...	\$1,110.42	8 %	\$0.00	0 %	\$1,110.42	8%	<input type="checkbox"/>	<input type="checkbox"/>	\$
Yepa, Felix - 830495317	Natural Resource Ecology Laboratory...	5611-...	\$850.92	100 %	\$0.00	0 %	\$850.92	100%	<input type="checkbox"/>	<input type="checkbox"/>	\$

Pre Review Home

Notes

Attachments

From the navigation menu, select **Certify**, and then click **My Project Statements**.



The Principal Investigators are listed in the Work List. Only the projects associated to the Primary/Secondary Effort Coordinator (Grant Manager) will be listed.

The screenshot shows the 'Work List' on the left, listing Principal Investigators (PIs) with their IDs. A green arrow points to the first PI, Luo, Jie R - 825753622. On the right, the 'Project Information' for project 5301334 - Sonar Echo and Information Flow Field Processing and Learning For Interactive Sensing and Inference is displayed, including Sponsor, Department, Activity Type, Field of Research, Project Period, and Sponsor Award Number.

Use the ► arrow key next to the PI's name to expand and view the Principal Investigator's project statements. The project statements will be grouped by status. Use the ► arrow next to each status to view all of the Principal Investigator's project statements that are in that status. A star next to the status name indicates that there are project statements in that status.

The screenshot shows the 'Work List' with a list of project statements grouped by status. The statuses are: Ready for Certification, Pre Reviewed, Ready for Pre Review, and Building (not yet ready for certification) ★. Green arrows point to the expandable arrows (►) next to each status. A red circle highlights the 'Building (not yet ready for certification) ★' status.

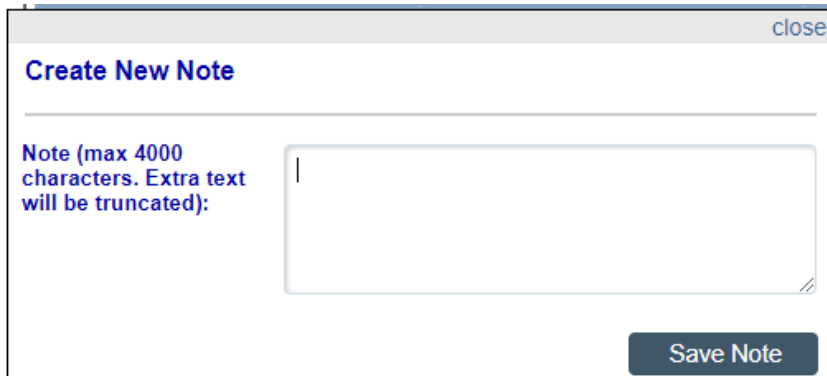
Click the project number, title, or period to navigate to the project statement for the period listed next to the project title.

The screenshot shows the 'Project Statement' for project 5301578 - SHF: Small: Energy-Efficient and Reliable Communication with Silicon Photonics for Terascale Datacenters-on-C... The project information is displayed on the right, including Sponsor, Department, Activity Type, Field of Research, Project Period, and Sponsor Award Number. Below the project information, a table lists the project statements for the period 10/1/2019 to 12/31/2019, due date 3/15/2020, Status: Building (not yet ready for certification). The table has columns for Employee, Department, Object Code, Payroll Dollars, Payroll %, Cost Share Dollars, Cost Share %, Payroll + Cost Share Dollars, Payroll + Cost Share %, Certify, Revise Payroll, and Action. The table shows two entries: Mirza, Mirza - 831078760 and Sunny, Febin - 832026952. Below the table, there are links for Notes, Attachments, Transactions, Activity Log, and Email Log.

Employee	Department	Object Code	Payroll Dollars	Payroll %	Cost Share Dollars	Cost Share %	Payroll + Cost Share Dollars	Payroll + Cost Share %	Certify	Revise Payroll	Action
Mirza, Mirza - 831078760	Electrical + Computer Engineering - CO...	5311-...	\$3,380.00	100 %	\$0.00	0 %	\$3,380.00	100%	<input type="checkbox"/>	<input type="checkbox"/>	\$
Sunny, Febin - 832026952	Electrical + Computer Engineering - CO...	5311-...	\$3,380.00	100 %	\$0.00	0 %	\$3,380.00	100%	<input type="checkbox"/>	<input type="checkbox"/>	\$

► Notes Use the Add Notes feature to add a note to a project statement.

Select the document icon and a new pop-up window appears. Enter a note that will be attached to the project statement in the pop up box.

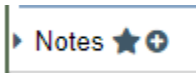


A pop-up window titled "Create New Note" with a "close" button in the top right corner. On the left, it says "Note (max 4000 characters. Extra text will be truncated):". To the right is a large text input area. At the bottom right is a "Save Note" button.



Notes appear on the statement **at all times**, so anyone that can view the statement will see the Notes. Notes cannot be deleted and will become part of the official ecrt record.

To retain the information entered, select the **Save Note** button.

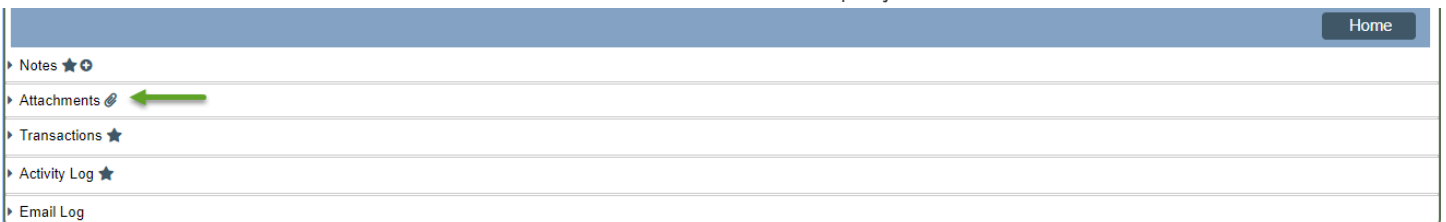
Once the note is saved, it is viewable within the Notes list. A star icon appears next to the **Notes** label when a note is present:








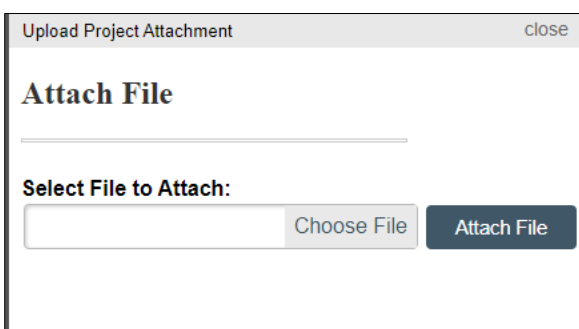
The date the note was added, the name and username of the person that added the note, and the note summary are visible. To view notes, click on the ► arrow icon next to Notes.

► Notes  				
	Date	User	Note	Action
►	01/21/2020	Kristi Savig -	test note	

Use the Add Attachments feature to add an attachment to a project statement.



A navigation menu with a "Home" button in the top right. The menu items are: "► Notes  " (selected), "► Attachments ", "► Transactions " (with a green arrow pointing to it), "► Activity Log " (with a green arrow pointing to it), and "► Email Log".



A pop-up window titled "Upload Project Attachment" with a "close" button in the top right corner. It has a section "Attach File" with a horizontal line below it. Below that is the label "Select File to Attach:" followed by a text input field, a "Choose File" button, and an "Attach File" button.

Select the paper clip icon and a new pop-up window appears.

To locate the file, select the Choose File (or Browse) button. When the correct file is selected, the file name will appear in the Select File to Attach field.

Select the Attach File button to upload the file to the project statement. Once the file is uploaded, a confirmation message appears.

The Attachments section of the project statement now displays the name of the file that was uploaded and the date it was uploaded.

Attachments		
Name	Date	Action
thepresidentsmanagementager	01/21/2020	
2019-28524.pdf	01/21/2020	

Note: Attachments cannot be deleted and will be part of the official ecrt record.

Any and all transactions that affect the project statement as well as all status changes are documented in the **Transactions Log**.

Click the ► arrow icon to expand the transaction log. Note, the transactions are reflected in the Action column and the user whom the transaction effects, is reflected in the User column.

Transactions			
Date	User	Object Code	Action
11/15/2019 8:31 AM	System User - 444-44-4444	N/A	Changed from Pre Reviewed to Ready for Certification
11/01/2019 2:57 PM	Kristi Savig -	N/A	Changed from Ready for Pre Review to Pre Reviewed
10/16/2019 8:30 AM	System User - 444-44-4444	N/A	Changed from Building (not yet ready for certification) to Ready for Pre Review
09/24/2019 7:01 AM	Ahmadinia, Saeid -	5311-GRA Salary	Statement updated: payroll \$1,800
09/24/2019 6:44 AM	Robbiano, Christopher P -	5311-GRA Salary	Statement updated: payroll \$1,800
09/09/2019 6:43 AM	Ahmadinia, Saeid -	5611-Stu Hr Sal	Statement updated: payroll \$960
09/09/2019 6:43 AM	Ahmadinia, Saeid -	5613-St Hr Sal OT	Statement updated: payroll \$24.84
08/26/2019 6:35 AM	Ahmadinia, Saeid -	5611-Stu Hr Sal	Statement updated: payroll \$923.76
08/23/2019 7:42 AM	Robbiano, Christopher P -	5311-GRA Salary	Statement updated: payroll \$1,800

The **Activity Log** tracks actions and activities that are not captured in the Transactions log including accessing and viewing the statement and assigning designees. Note, the activities are reflected in the Action column and the person who performed the activity is reflected in the User column.

Activity Log ★		
Date	User	Action
01/21/2020 5:13 PM	Kristi Savig -	The project statement was viewed.
01/21/2020 4:50 PM	Kristi Savig -	The project statement was viewed.
12/06/2019 8:30 AM	System User - 444-44-4444	The project statement was opened for certification.
12/04/2019 8:30 AM	System User - 444-44-4444	The project statement was opened for certification.
12/03/2019 12:44 PM	Kristi Savig -	The project statement was viewed.
11/16/2019 8:30 AM	System User - 444-44-4444	The project statement was opened for certification.
11/15/2019 8:31 AM	System User - 444-44-4444	The project statement was opened for certification.
11/01/2019 2:57 PM	Kristi Savig -	The Pre Review of the project statement is complete.
11/01/2019 2:45 PM	Kristi Savig -	The project statement was viewed.

The **Email Log** captures all emails relevant to the project statement. The type of email sent is reflected in the Action column.

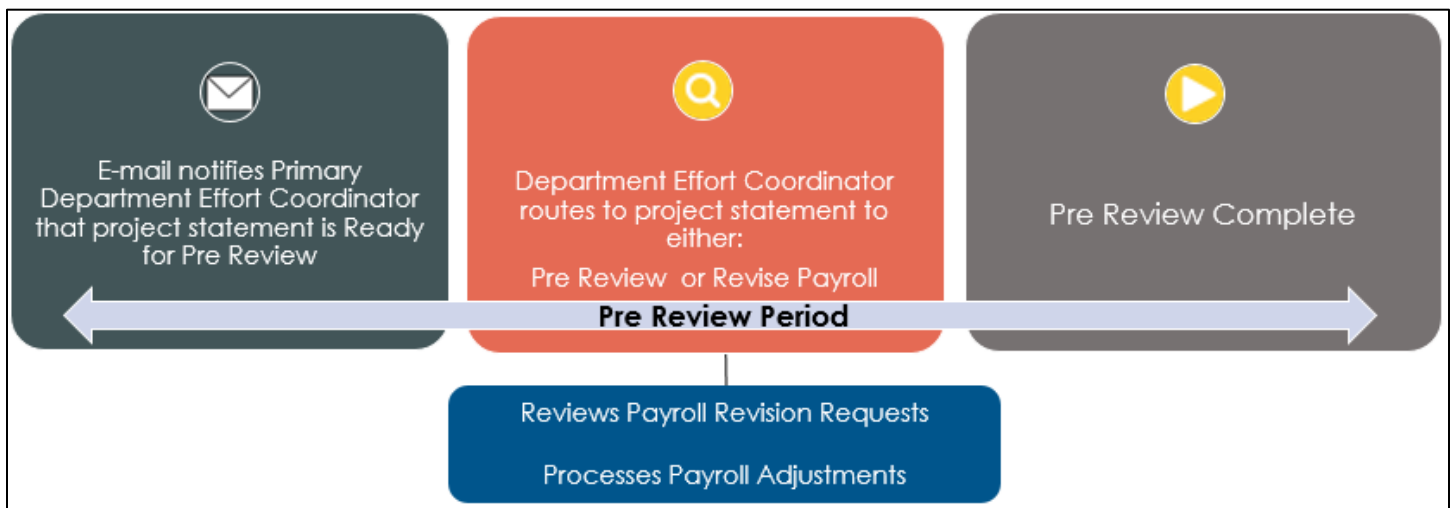
Email Log ★		
Date	User	Action
12/05/2019 8:30 AM	System User - 444-44-4444	The project statement certification reminder notification email was sent to mahmood.azimi-sadjadi@colostate.edu
11/15/2019 8:32 AM	System User - 444-44-4444	The certification period opening notification email was sent to mahmood.azimi-sadjadi@colostate.edu
10/16/2019 8:30 AM	System User - 444-44-4444	The project statement pre-review notification email was sent to kristi.savig@colostate.edu

The log records the following emails:

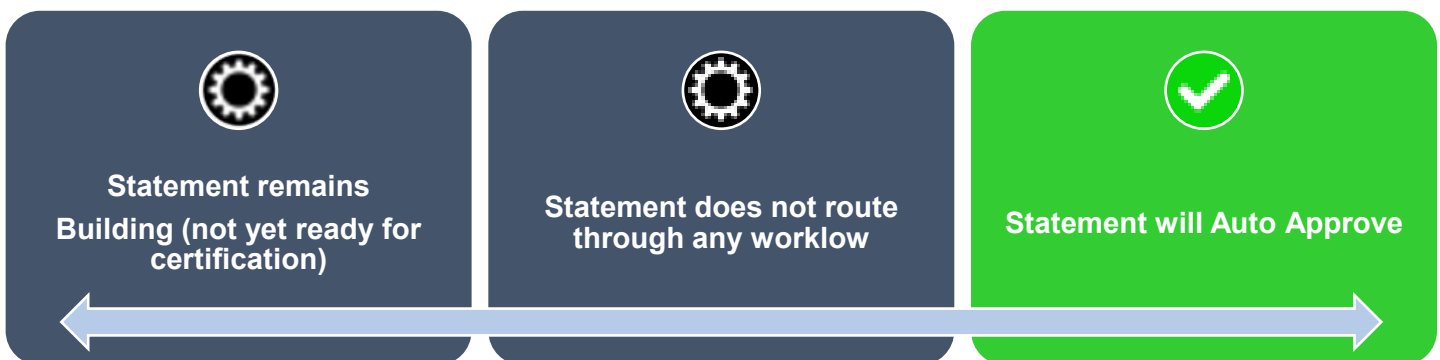
- All notification emails and all reminder emails
- Emails triggered from the statement to the statement owner
- Group emails based on the status of the statement, regardless of where the message was initiated
- Emails about the statement being returned to the Principal Investigator or reopened.

E. Understanding the Pre-Review Process – Sponsored Projects

All sponsored projects, both Federal and Non-Federal, must be Pre Reviewed.



Nonsponsored Accounts – no Pre-Review



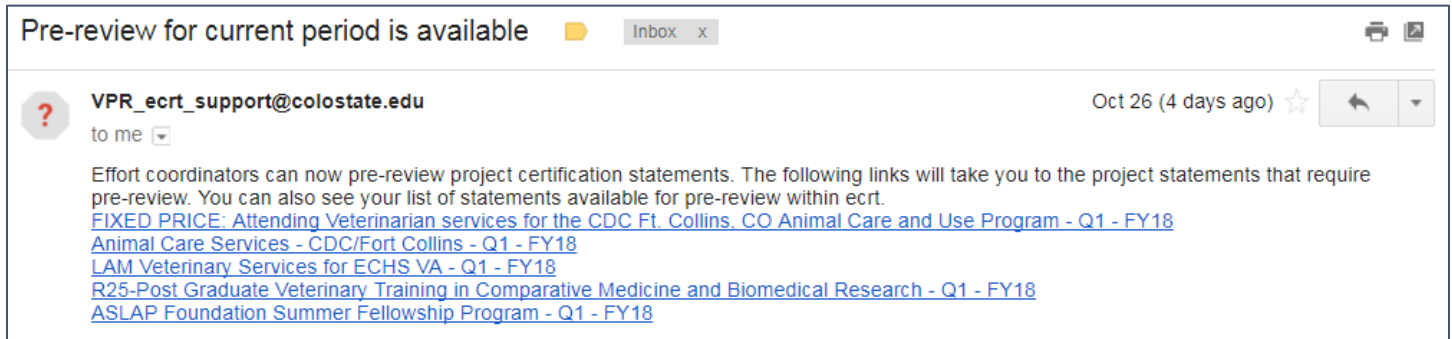
EcrT will also generate statements for Nonsponsored Accounts. The statement will remain in the status 'Building (not yet ready for certification)' until the Certification period begins. The statement will then move to the status 'Auto Approved'.

Any statement can be viewed at any time by users who have the right to view a project statement. No action is required in ecrT for auto-approved statements, but they should be reviewed for accuracy.

F. Pre-Reviewing a Project Statement



The Primary/Secondary Effort Coordinator (Grant Manager) will receive a system generated email notifying them that project statements are now in the status 'Ready for Pre Review'.



Note: The Primary Effort Coordinator should be aware of all Grant Managers (Secondary Effort Coordinators) in their department. The Grant Manager (Secondary Effort Coordinator) should perform all actions on their assigned projects even though the Primary Department Effort Coordinator has ability to perform the same actions.

After logging in, from the Home Page, click the **Assigned Accounts** tab to view all project statements that are Ready for Pre Review.

Work List for Jennifer Scheffing

Welcome to the **ecrt** effort reporting system. The tabs below list all of the effort certification tasks that require your attention - whether it is certifying statements, processing statements, or following up on outstanding statements. To view and resolve the specific task, select the link in the task description.

Principal Investigator	Project Title	Project Account	Account Number	Sponsor Name	Period	Status	Staff
Cotrufo, Francesca F	Microbial Carbon Cycling in Terre...	5392785	5392785	DOE-NNSA-Los Alamos ...	Q1 - FY20	Ready for Pre Review	●
Paustian, Keith H	Center for Bioenergy Innovation	5379519	5379519	DOE-Oak Ridge National...	Q1 - FY20	Ready for Pre Review	●
Paustian, Keith H	Develop & Validate a Soil Health ...	5391265	5391265	Soil Health Institute	Q1 - FY20	Ready for Pre Review	●

Note: All columns are sortable except the Sponsor Name and Status columns.

Click one of the hyperlinks next to navigate to the project statement page. (Any blue text is a hyperlink.)

The project statement appears.

Employee	Department	Object Code	Payroll Dollars	Payroll %	Cost Share Dollars	Cost Share %	Payroll + Cost Share Dollars	Payroll + Cost Share %	Certify	Revise Payroll \$	Action
Bagdon, Ben - 831389497	Natural Resource Ecology Laboratory...	5111-...	\$0.00	0 %	\$0.00	0 %	\$0.00	0%	<input type="checkbox"/>	<input type="checkbox"/>	\$
Sterle, David - 830225103	Western Colorado Research Center - ...	5111-...	\$1,110.42	8 %	\$0.00	0 %	\$1,110.42	8%	<input type="checkbox"/>	<input type="checkbox"/>	\$
Yepa, Felix - 830495317	Natural Resource Ecology Laboratory...	5611-...	\$850.92	100 %	\$0.00	0 %	\$850.92	100%	<input type="checkbox"/>	<input type="checkbox"/>	\$

Pre Review Home

Notice the selected project is highlighted in the Work List in the left pane of the project statement.

[+] My Quarterly Project Statements Instructions

To certify effort on this project, review the Payroll Percentage, Cost Share, and Certified Percentage fields for each employee who worked on the project during the certification period. If the information is not accurate, confirm the information is accurate, click each line's Certify checkbox and press the Confirm button.

Work List

▼ Paustian, Keith H - 821012865

► Ready for Certification ★

Pre Reviewed

▼ Ready for Pre Review ★

5313505	Maintenance and enhanced development o... Q1 - FY20
5313518	Revision and Implementation of NTT Syste... Q1 - FY20
5344403	Integration of the COMET-Farm and COME... Q1 - FY20

5313505 - Maintenance and enhanced development of COMET-Farm and web-b...

Project Information

Sponsor: USDA-NRCS

Department: CO-1170

Activity Type: Research

Field of Research: D.01 - Agricultural Sciences - Life Sciences

Project Period: 06/16/2015 to 06/30/2020

Sponsor Award Number: 68-7482-15-507

Project information including the Sponsor Name, Department, CFDA #, Activity Type, Field of Research, Project Period and Sponsor Award Number appear in the right pane of the project statement.

5313505 - Maintenance and enhanced development of COMET-Farm and web-based tools for implementation of agricultural conservation practi...

Project Information

Sponsor: USDA-NRCS-Natural Resources Conservtn Srv

Department: CO-1170 - Soil + Crop Sciences

Activity Type: Research


Field of Research: D.01 - Agricultural Sciences - Life Sciences

Project Period: 06/16/2015 to 06/30/2020

Sponsor Award Number: 68-7482-15-507

The project statement lists all employees who were paid or cost shared during the period listed.

Project Statement for 5392771: Next Generation Technology for Monitoring Edge-of-Field Water Q... Effort from 10/1/2019 to 12/31/2019, due date 3/15/2020; Status: Ready for Pre Review

Employee	Department	Object Code	Payroll Dollars	Payroll %	Cost Share Dollars	Cost Share %	Payroll + Cost Share Dollars	Payroll + Cost Share %	Certify	Revise Payroll \$	Action
Bauder, Troy	Agricultural Experiment Station - C...	5111-...	\$0.00	0 %	\$1,398.99	5 %	\$1,398.99	5%	<input type="checkbox"/>	<input type="checkbox"/>	
Casner, Dylan	Soil + Crop Sciences - CO-1170	5311-...	\$5,955.00	100 %	\$0.00	0 %	\$5,955.00	100%	<input type="checkbox"/>	<input type="checkbox"/>	

The percentages on the project statement are rounded to the nearest whole number. To view the payroll details, run the payroll reports under the **Action** column.

The payroll columns displayed on the project statement include:

Column Name	Description
Payroll Dollars	Dollar amount the employee was paid from the project for the period.
Payroll Percentage	Percentage of the payroll dollars based on the person's total pay for the period.
Cost Share Dollars	Cost share dollar amount the employee was paid from the project for the period.
Cost Share	Percentage of the cost share dollars based on the person's total pay for the period.
Payroll + Cost Share Dollars	Payroll dollars + cost share dollars for the period.
Payroll + Cost Share	Payroll percentage + cost share percentage for the period.



If the payroll for all employees is accurately reflected on the project statement, **click the Pre Review button**. The statement will then route to status, Pre Reviewed.

Project Statement for 5392771: Next Generation Technology for Monitoring Edge-of-Field Water Q...; Effort from 10/1/2019 to 12/31/2019, due date 3/15/2020. Status: Ready for Pre Review											
Employee	Department	Object Code	Payroll Dollars	Payroll %	Cost Share Dollars	Cost Share %	Payroll + Cost Share Dollars	Payroll + Cost Share %	Certify	Revise Payroll	Action
Bauder, Troy -	Agricultural Experiment Station - C...	5111-...	\$0.00	0 %	\$1,398.99	5 %	\$1,398.99	5%	<input type="checkbox"/>	<input type="checkbox"/>	\$
Casey, Dylan -	Soil + Crop Sciences - CO-1170	5311-...	\$5,955.00	100 %	\$0.00	0 %	\$5,955.00	100%	<input type="checkbox"/>	<input type="checkbox"/>	\$
Deleon, Manny -	Soil + Crop Sciences - CO-1170	5111-...	\$1,192.50	9 %	\$1,415.10	11 %	\$2,607.60	20%	<input type="checkbox"/>	<input type="checkbox"/>	\$
Ham, Jay -	Soil + Crop Sciences - CO-1170	5011-...	\$0.00	0 %	\$9,614.26	20 %	\$9,614.26	20%	<input type="checkbox"/>	<input type="checkbox"/>	\$
Trimarco, Tad -	Soil + Crop Sciences - CO-1170	5611-...	\$158.14	7 %	\$0.00	0 %	\$158.14	7%	<input type="checkbox"/>	<input type="checkbox"/>	\$
Wardle, Erik -	Soil + Crop Sciences - CO-1170	5111-...	\$0.00	0 %	\$2,800.98	15 %	\$2,800.98	15%	<input type="checkbox"/>	<input type="checkbox"/>	\$
Yoder, Natalie -	Horticulture + Landscape Architectu...	5111-...	\$3,126.18	25 %	\$0.00	0 %	\$3,126.18	25%	<input type="checkbox"/>	<input type="checkbox"/>	\$
										Pre Review	Home

Project Statement for 5301557: High Efficiency Waste Heat Driven Cooling System (Q2 - FY20); Effort from 10/1/2019 to 12/31/2019, due date 3/15/2020. Status: Pre Reviewed											
Employee	Department	Object Code	Payroll Dollars	Payroll %	Cost Share Dollars	Cost Share %	Payroll + Cost Share Dollars	Payroll + Cost Share %	Certify	Revise Payroll	Action
	Mechanical Engineering - CO-1374	5111-...	\$0.00	0 %	\$1,079.26	6 %	\$1,079.26	6%	<input type="checkbox"/>	<input type="checkbox"/>	\$
										Home	

To continue reviewing your project statements, use the upper left worklist pane. Expand the list by clicking the ► icon next the Principal Investigator's name. Another option is to click 'Home' from the navigation menu to route back to the Home page.

Work List	5301334 - Sonar Echoic and Information Flow Field Processing and Learning For Interactive Sensing and Inference
<ul style="list-style-type: none"> Luo, Jie R - 825753622 Maciejewski, Anthony A - 824106452 Notaros, Branislav M - 825790134 Pasricha, Sudeep - 828097383 Sampath, Walajabad S - 820950033 Shimpi, Tushar M - 823317524 Suryanarayanan, Sid - 829302391 Wilson, Jesse W - 821125873 Yang, Liuqing - 829302398 Young, Peter - 823368974 	<p>Project Information</p> <p>Sponsor: DOD-NAVY-ONR-Office of Naval Research</p> <p>Department: CO-1373 - Electrical + Computer Engineering Research</p> <p>Activity Type: B.05 - Electrical, Electronic, and Communications Engineering - ...</p> <p>Field of Research: 07/16/2018 to 07/15/2020</p> <p>Project Period: N00014-18-1-2805</p> <p>Sponsor Award Number:</p>



Click the select all icon to view all project statements for a PI on one page.

Each project statement will need to be Pre Reviewed individually even though they will appear on one page.

Work List	5313505 - Maintenance and enhanced development of COMET-Farm and ... Q1 - FY20
<ul style="list-style-type: none"> ▼ Paustian, Keith H - 821012865 ► Ready for Certification ★ Pre Reviewed ▼ Ready for Pre Review ★ 5313505 Maintenance and enhanced develop... Q1 - FY20 5313518 Revision and Implementation of NTT... Q1 - FY20 5344403 Integration of the COMET-Farm and ... Q1 - FY20 	<p>Project Information</p> <p>Sponsor:</p> <p>Department:</p> <p>Activity Type:</p> <p>Field of Research:</p> <p>Project Period:</p> <p>Sponsor Award Number:</p>

G. Revise Payroll during Pre Review



If the payroll for all employees is **not accurately reflected** on the project statement, select the checkbox under the Revise Payroll column for those employees whose payroll is not accurate, then click the Revise Payroll button.

In this example, the payroll is inaccurate for two employees on the project statement and a payroll adjustment is needed.

Project Statement for 5392771: Next Generation Technology for Monitoring Edge-of-Field Water Qua... Effort from 10/1/2019 to 12/31/2019, due date 3/15/2020; Status: Ready for Pre Review

Employee	Department	Object Code	Payroll Dollars	Payroll %	Cost Share Dollars	Cost Share %	Payroll + Cost Share Dollars	Payroll + Cost Share %	Revise Payroll	Action
Bauder, T	Agricultural Experiment Station - CO-...	5111-...	\$0.00	0 %	\$1,398.99	5 %	\$1,398.99	5%	<input type="checkbox"/>	\$
Casey, J	Soil + Crop Sciences - CO-1170	5311-...	\$5,955.00	100 %	\$0.00	0 %	\$5,955.00	100%	<input type="checkbox"/>	\$
De...	Soil + Crop Sciences - CO-1170	5111-...	\$1,192.50	9 %	\$1,415.10	11 %	\$2,607.60	20%	<input type="checkbox"/>	\$
Ham, J	Soil + Crop Sciences - CO-1170	5011-...	\$0.00	0 %	\$9,614.26	20 %	\$9,614.26	20%	<input type="checkbox"/>	\$
Trima	Soil + Crop Sciences - CO-1170	5611-...	\$158.14	7 %	\$0.00	0 %	\$158.14	7%	<input checked="" type="checkbox"/>	\$
Wardle, I	Soil + Crop Sciences - CO-1170	5111-...	\$0.00	0 %	\$2,800.98	15 %	\$2,800.98	15%	<input type="checkbox"/>	\$
Yod	Horticulture + Landscape Architectur...	5111-...	\$3,126.18	25 %	\$0.00	0 %	\$3,126.18	25%	<input checked="" type="checkbox"/>	\$

to select all entries in the column, click the icon

Revise Payroll Home



If payroll is inaccurate for all employees, select the icon under the Revise Payroll column to auto check all checkboxes.

When the Revise Payroll button is clicked, the project statement updates to the status, 'Revision Requested'. This means the project statement is on hold and will not proceed to the next step in the workflow.

Project Statement for 5391274: Dissecting Hormonal Crosstalk during Tomato Fruit Developmen... Effort from 10/1/2019 to 12/31/2019; Status: Revision Requested

Employee	Department	Object Code	Payroll Dollars	Payroll %	Cost Share Dollars	Cost Share %	Payroll + Cost Share Dollars	Payroll + Cost Share %	Certify	Revise Payroll	Action
...	Bioagricultural Sciences + Pest Mg...	5011-...	\$3,016.97	10 %	\$0.00	0 %	\$3,016.97	10%	<input type="checkbox"/>	<input checked="" type="checkbox"/>	\$
...	Bioagricultural Sciences + Pest Mg...	5611-...	\$1,384.44	67 %	\$0.00	0 %	\$1,384.44	67%	<input type="checkbox"/>	<input checked="" type="checkbox"/>	\$
...	Bioagricultural Sciences + Pest Mg...	5651-...	\$272.94	30 %	\$0.00	0 %	\$272.94	30%	<input type="checkbox"/>	<input checked="" type="checkbox"/>	\$

A **Project Statement Revision Requested task** is automatically generated and routed to the Primary/Secondary Effort Coordinator (Grant Manager) to review.

Statements Awaiting Certification		Pending Payroll Tasks (2)		Assigned Accounts	
Type	Identifier	Name	Date		
Project Statement Revision Requested	5392771	Next Generation Technology for Monitoring...	04/01/20		

H. Revision Requested Task during Pre Review

After clicking the Revise Payroll button, a Project Statement Revision Requested task will be created and appear on the Primary/Secondary Effort Coordinator's (Grant Manager's) Home Page under the Pending Payroll Tasks tab.

Work List for Paula White			
Welcome to the ecrt effort reporting system. The tabs below list all of the effort certification tasks that require your attention - whether it is certifying statements, processing statements, or following up on outstanding statements. To view and resolve the specific task, select the link in the task description.			
Statements Awaiting Certification	Pending Payroll Tasks (1)	Assigned Accounts	
Type	Identifier	Name	Date
Project Statement Revision Requested	5391274	Dissecting Hormonal Crosstalk during Tom...	02/07/2020 4:22 PM

The Primary/Secondary Effort Coordinator (Grant Manager) must decide whether to Approve or Reject the payroll revision request. To view pending requests in order to accept or reject, click the hyperlink in the Pending Payroll Tasks tab.

If a payroll revision **does not** need to occur, the Effort Coordinator should click the **Reject button**.

5391274: Dissecting Hormonal Crosstalk during Tomato Fruit Development (Q2 - F-20) Effort from 10/1/2019 to 12/31/2019, Status: Revision Requested													
Employee	Department	Object Code	Payroll Dollars	Previous Payroll	Payroll %	Cost Share Dollars	Previous Cost Share	Cost Share %	Payroll + Cost Share Dollars	Payroll + Cost Share %	Certify	Revise Payroll	Action
0323440	Bioagricultural Sciences + Pest Mgt - CO-1...	5011-...	\$3,016.97	10%	10 %	\$0.00	0%	0 %	\$3,016.97	10%	<input type="checkbox"/>	<input type="checkbox"/>	\$
30854921	Bioagricultural Sciences + Pest Mgt - CO-1...	5611-...	\$1,384.44	67%	67 %	\$0.00	0%	0 %	\$1,384.44	67%	<input type="checkbox"/>	<input checked="" type="checkbox"/>	\$
31304580	Bioagricultural Sciences + Pest Mgt - CO-1...	5651-...	\$272.94	30%	30 %	\$0.00	0%	0 %	\$272.94	30%	<input type="checkbox"/>	<input type="checkbox"/>	\$
												Reject	Approve
												Home	

The statement will then return to the 'Ready for Pre Review' status and appear back on the Effort Coordinator's Assigned Accounts tab. The Effort Coordinator should then Pre Review the project statement.

If a payroll revision **does** need to occur, the Effort Coordinator should click the **Approve button**. The project statement remains in the 'Revision Requested' status. The Effort Coordinator should now create the PPDA outside of ecrt.

5391274: Dissecting Hormonal Crosstalk during Tomato Fruit Development (Q2 - F-20) Effort from 10/1/2019 to 12/31/2019, Status: Revision Requested													
Employee	Department	Object Code	Payroll Dollars	Previous Payroll	Payroll %	Cost Share Dollars	Previous Cost Share	Cost Share %	Payroll + Cost Share Dollars	Payroll + Cost Share %	Certify	Revise Payroll	Action
0323440	Bioagricultural Sciences + Pest Mgt - CO-1...	5011-...	\$3,016.97	10%	10 %	\$0.00	0%	0 %	\$3,016.97	10%	<input type="checkbox"/>	<input type="checkbox"/>	\$
30854921	Bioagricultural Sciences + Pest Mgt - CO-1...	5611-...	\$1,384.44	67%	67 %	\$0.00	0%	0 %	\$1,384.44	67%	<input type="checkbox"/>	<input checked="" type="checkbox"/>	\$
31304580	Bioagricultural Sciences + Pest Mgt - CO-1...	5651-...	\$272.94	30%	30 %	\$0.00	0%	0 %	\$272.94	30%	<input type="checkbox"/>	<input type="checkbox"/>	\$
												Reject	Approve
												Home	

Note: Payroll adjustments are NOT made in ecrt. Once a completed Past Period Distribution Adjustment (PPDA) is processed by HR and the transaction has hit KFS, the new salary information will be loaded to ecrt for the revision task to be reviewed/completed.

Once the revision requested task is either Rejected or Approved, the task will then fall off the Pending Payroll Tasks tab on the Home Page.

I. Revision Pending Task during Pre Review

All PPDA's must be made outside of ecrt. After the payroll adjustment is loaded into ecrt, a **Process Project Statement Revision** task will be created and appear on the Primary/Secondary Effort Coordinator's (Grant Manager's) Home Page under the Pending Payroll Tasks tab.

Statements Awaiting Certification		Pending Payroll Tasks (4)	Assigned Accounts	
Type	Identifier	Name	Date	
Process Project Statement Revision	5302365	Hyaluronan Enhanced Small Diameter Vascular G...	02/07/2020 6:56 AM	
Process Project Statement Revision	5301422	Prediction Signal Quality Influences on Acceleratio...	02/06/2020 6:38 AM	

The project statement will update to the status 'Revision Pending' meaning a payroll adjustment is pending for the project statement.

2365: Hyaluronan Enhanced Small Diameter Vascular Grafts (Q2 - FY20) ; Effort from 10/1/2019 to 12/31/2019; Status: Revision Pending

	Department	Object Code	Payroll Dollars	Payroll %	Cost Share Dollars	Cost Share %	Payroll + Cost Share Dollars	Payroll + Cost Share %	Certify	Revise Payroll	Action
	Mechanical Engineering - CO-1374	5651-...	\$186.73	11 %	\$74.34	4 %	\$261.07	15%	<input type="checkbox"/>	<input type="checkbox"/>	\$
	Mechanical Engineering - CO-1374	5651-...	\$0.00	0 %	\$195.95	18 %	\$195.95	18%	<input type="checkbox"/>	<input type="checkbox"/>	\$
49	Chemistry - CO-1872	5611-...	\$17.03	1 %	\$0.00	0 %	\$17.03	1%	<input type="checkbox"/>	<input checked="" type="checkbox"/>	\$
49	Chemistry - CO-1872	5651-...	\$337.20	18 %	\$0.00	0 %	\$337.20	18%	<input type="checkbox"/>	<input checked="" type="checkbox"/>	\$

Home

Click on the hyperlink **Process Project Statement Revision**

The Effort Coordinator should review the new payroll for accuracy. The new payroll should reflect the payroll adjustment that was made by the PPDA.

Project Payroll Revision

The Project Payroll Revision page presents to administrators payroll transactions that impact open project statements and allows them to determine how to treat those transactions. The actions a user can take, represented by the presence of buttons displayed below the transaction summary, are determined by the institution's configured thresholds and the responsibilities assigned to the user's role.

Account Number: 5378084
Period of Performance: Q2 - FY20
Department: Soil + Crop Sciences

Account Name: Sustainable Land Management and Climate Change Mitigation Co-Benefits (SLM-CCMC)
Principal Investigator: Paustian, Keith H - 821012865
Grant Manager: Scheffing, Jennifer S - 830474485 (PEC)

Project Payroll Reconciliation for Period of Performance - 5378084, Q2 - FY20 10/01/2019 to 12/31/2019

Employee	Object Code	Summarized Adjustment	Original Payroll + Cost Share \$	New Payroll + Cost Share \$	Original Percentage	Original Percentage vs New Payroll + Cost Share \$ Variance
Dheenadayalan Sivakami, Guhan - 828982141	5111-Adm Pro Sal	\$ (\$3,000.00)	\$8,588.41	\$5,588.41	\$8,588.41	\$3,000.00
Paustian, Keith - 821012865 ***	5111-Adm Pro Sal	\$ (\$3,000.00)	\$0.00	(\$3,000.00)	\$0.00	\$3,000.00
Easter, Mark - 821100295	5111-Adm Pro Sal		\$7,999.83	\$7,999.83	\$7,919.83	(\$80.00)
Paustian, Keith - 821012865	5011-Faculty Sal		\$4,113.89	\$4,113.89	\$4,113.89	\$0.00
Sutton, Ben - 825721765	5111-Adm Pro Sal		\$18,404.66	\$18,404.66	\$18,404.66	\$0.00
Swan, Amy - 823097626	5111-Adm Pro Sal		\$1,636.50	\$1,636.50	\$1,636.50	\$0.00
Total		(\$6,000.00)				

[View Project Statement](#)
[Post](#)
[Post & Maintain](#)

In this example, adjustments were made to multiple line items.

The following fields appear on the task:

Column Name	Description
Employee	Employee name and id that the new payroll affects
Object code	Employee object code
Summarized Adjustment	The dollar amount added or deleted from the line item
Original Payroll + Cost Share \$	The dollar value for original payroll/cost share amounts.
New Payroll + Cost Share \$	Dollar value for for adjusted payroll/cost share amounts.
Original \$	The original amount of the salary
Original \$ vs. New Payroll + Cost Share \$ Variance	The calculated variance between the original and the changed value.

The Effort Coordinator will have the option to **Post** or **Post and Maintain** the Revision Pending task.

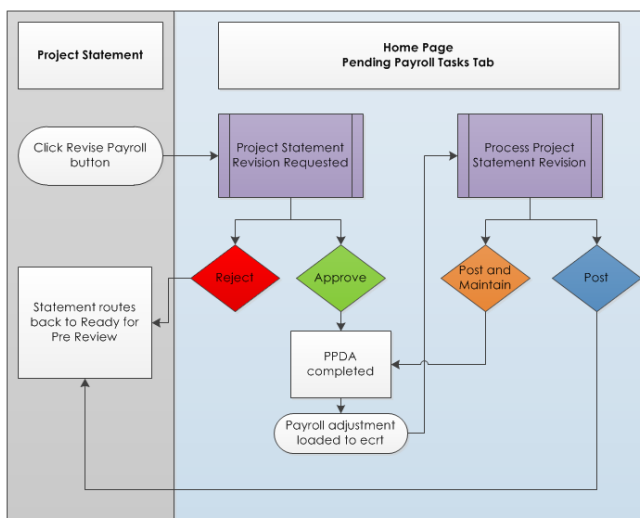
Post

Select the **Post** button if the payroll displayed on the Revision Pending task accurately reflects the payroll for the employee for the project for the period. The payroll will update on the project statement after the Post button is clicked. The project statement will route to the 'Ready for Pre Review' status and appear on the Assigned Accounts tab.

Post & Maintain

Select the **Post & Maintain** button **only if** the payroll displayed on the Revision Pending task **does not accurately reflect** the payroll for the employee for the project for the period and another payroll adjustment needs to occur. **The payroll displayed on the task will post to the project statement but the statement will remain in the 'Revision Requested' status.** The statement will remain on hold and not route to the next step in the workflow.

J. Revision Requested and Revision Pending Tasks Workflow – Pre Review



Once the payroll is accurate on the project statement, the Effort Coordinator should complete the Pre Review for the statement. The statement will then route to the status 'Pre Reviewed'.

Project Statement for 5392771: Next Generation Technology for Monitoring Edge-of-Field Wat... Effort from 10/1/2019 to 12/31/2019, due date 3/15/2020										Status: Ready for Pre Review	
Employee	Department	Object Code	Payroll Dollars	Payroll %	Cost Share Dollars	Cost Share %	Payroll + Cost Share Dollars	Payroll + Cost Share %	Certify	Revise Payroll	Action
Bauder, Troy	Agricultural Experiment Station - ...	5111-...	\$0.00	0 %	\$1,398.99	5 %	\$1,398.99	5%	<input type="checkbox"/>	<input type="checkbox"/>	\$
Casey, Dylan	Soil + Crop Sciences - CO-1170	5311-...	\$5,955.00	100 %	\$0.00	0 %	\$5,955.00	100%	<input type="checkbox"/>	<input type="checkbox"/>	\$
Deleon, M...	Soil + Crop Sciences - CO-1170	5111-...	\$1,192.50	9 %	\$1,415.10	11 %	\$2,607.60	20%	<input type="checkbox"/>	<input type="checkbox"/>	\$
Ham, Jay	Soil + Crop Sciences - CO-1170	5011-...	\$0.00	0 %	\$9,614.26	20 %	\$9,614.26	20%	<input type="checkbox"/>	<input type="checkbox"/>	\$
Trimarco, ...	Soil + Crop Sciences - CO-1170	5611-...	\$158.14	7 %	\$0.00	0 %	\$158.14	7%	<input type="checkbox"/>	<input type="checkbox"/>	\$
Wardle, Lm...	Soil + Crop Sciences - CO-1170	5111-...	\$0.00	0 %	\$2,800.98	15 %	\$2,800.98	15%	<input type="checkbox"/>	<input type="checkbox"/>	\$
Yoder, Natalie	Horticulture + Landscape Architec...	5111-...	\$3,126.18	25 %	\$0.00	0 %	\$3,126.18	25%	<input type="checkbox"/>	<input type="checkbox"/>	\$
										Pre Review	Home

Updated project statement after the **Post** button is clicked on the **Revision Pending** task. The statement is now back in Ready for Pre Review status.

When a statement has been Pre Reviewed, it will no longer appear on the Home Page > Assigned Accounts tab.

Before:

Statements Awaiting Certification		Pending Payroll Tasks (1)		Assigned Accounts (8)			
Principal Investigator	Project Title	Project Account	Account Number	Sponsor Name	Period	Status	Staff
Ham, Jay M	Next Generation Technol...	5392771	5392771	USDA-NRCS-Nat...	Q2 - FY20	Ready for Pre Review	

After:

Project Statement for 5392771: Next Generation Technology for Monitoring Edge-of-Field Wat... Effort from 10/1/2019 to 12/31/2019, due date 3/15/2020										Status: Pre Reviewed
---	--	--	--	--	--	--	--	--	--	----------------------

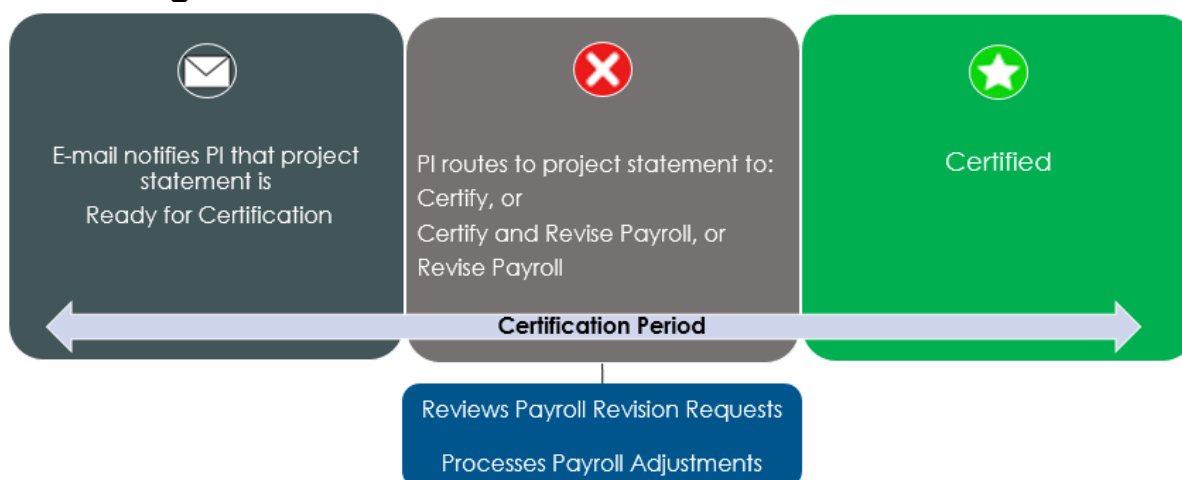
After the Pre Review task is complete, the item no longer displays on the Home page, but the statement can be seen in the DEC's Work list, organized by PI name, in the Pre Reviewed section:

Work List	
► Ready for Certification ★	
► Pre Reviewed ★	
5392771	Next Generation Technology fo... Q2 - FY20

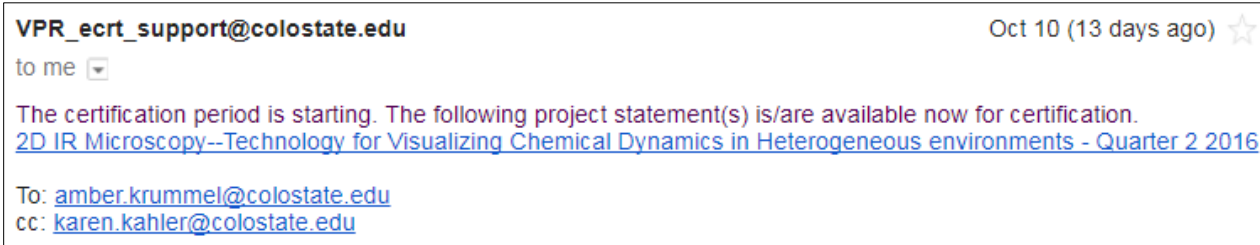
The statement will not be available to the Principal Investigator for certification until it is Pre Reviewed. The statement will remain in Pre Reviewed status until the certification period begins. If the statement is Pre Reviewed after the certification period starts, the statement will route to the Principal Investigator the following day for Certification.

NEW: If a statement Pre-Review action was completed in error, contact OSP. An OSP Functional Administrator can re-set the status back to "Ready for Pre-Review" as long as the certification period has not begun, or, if the certification period has begun, the statement has not been certified by the PI.

K. Understanding the Certification Process



When the Certification period begins, the Principal Investigator will receive a system generated email notifying them that their project statements are **Ready for Certification**. The Primary/Secondary Effort Coordinator (Grant Manager) will be copied on each email.



The Principal Investigator will click the project name and be routed to the ecrt Home Page.

After logging in, the Work List will appear. Under the Statements Awaiting Certification tab and the My Quarterly Project Statements header, all project statements that are **Ready for Certification** will appear. The Principal Investigator can click any hyperlink to navigate to the project statement.

The screenshot shows the ecrt system interface. The top navigation bar includes: Home, Certify, Manage, Reports, Administration, Links. Below this is a sub-header: Home Page, About.

The main content area is titled **Work List for Kim Hoke**. It includes a welcome message and instructions. Below this, there is a tab for **Statements Awaiting Certification (2)**.

Under the **My Quarterly Project Statements** header, there is a table with the following data:

Project Title	Project Account	Sponsor	Period	Due Date	Status	Staff
CAREER: Flexibility, Constraints...	5337024	NSF-National Sci...	Q2 - FY20	3/15/2020	Ready for Certification	●
PARTICIPANT SUPPORT: CAR...	5337079	NSF-National Sci...	Q2 - FY20	3/15/2020	Ready for Certification	●

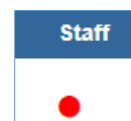
A green arrow points to the **Status** column of the table.

Below the table, there is a section for **Associated Quarterly Project Statements (View Only)**. It includes a sub-header and a table with the same columns as the one above. The message below the table states: "There are no Project statements associated with you".

NOTE: If the Principal Investigator has a Prime Award but the award has project numbers led by other PIs, the project statements will appear under the Associated Quarterly Project Statements (View-Only) section. The Principal Investigator does not need to certify these statements, but has the right to view the statements.

Associated Quarterly Project Statements (View Only)			
Top of Page	My Quarterly Project Statements		
Project Title	Project Account	Sponsor	Period

The Principal Investigator can click on the red icon in the Staff column to view all staff that will appear on that project statement.



Statements Awaiting Certification (3)

My Quarterly Project Statements

Top of Page Associated Quarterly Project Statements (View Only)

Project Title	Project Account	Sponsor
Boulder County Carbon Sequestration Pil...	5363722	Boulder Co

Staff for Boulder County Carbon Sequestration Pilot Program - Q1 - FY20

close

Employee

Ty W Boyack - 822184189
Tamera E Breidenbach - 831550028
Mark J Easter - 821100295
Matthew A Stermer - 821853803
Shaley S Toureene - 831868612

Staff



The Principal Investigator can click the Select All icon located on the top left work list pane to view all project statements on one screen. Although all project statements will appear on the page, each statement will need to be **certified individually**.

My Quarterly Project Statements Instructions

To certify effort on this project, review the Payroll Percentage, Cost Share, and Certified Percentage fields for each employee who worked on the project during the certification period. If the information is not accurate, contact your department effort coordinator. If the information is accurate, click each line's Certify checkbox and press the Confirm button.

Work List

▼ Hoke, Kim - 828256472

▼ Ready for Certification ★

5337024	CAREER: Flexibility, Constrai... Q2 - FY20
5337079	PARTICIPANT SUPPORT: CA... Q2 - FY20

Pre Reviewed

Ready for Pre Review

5337024 - CAREER: Flexibility, Constraints, and Selection in Repeated Ear Loss and Regain in Toads

Project Information

Sponsor:	NSF-National Science Foundation
Department:	CO-1878 - Biology
Activity Type:	Research
Field of Research:	D.02 - Biological and Biomedical Sciences - Life...
Project Period:	07/01/2014 to 06/30/2020
Sponsor Award Number:	1350346


Project Statement for 5337024: CAREER: Flexibility, Constraints, and Selection in Repeated ... Effort from 10/1/2019 to 12/31/2019, due date 3/15/2020; Status: Ready for Certification

Employee	Department	Object Code	Payroll Dollars	Payroll %	Cost Share Dollars	Cost Share %	Payroll + Cost Share Dollars	Payroll + Cost Share %	Certify	Revise Payroll	Action
Fleming, Rachel - 831992267	Biology - CO-1878	5311-...	\$6,600.00	100 %	\$0.00	0 %	\$6,600.00	100%	<input type="checkbox"/>	<input type="checkbox"/>	\$

Get Help Save Home

Get Help

The Principal Investigator can use the **Get Help** button to send an email to the Primary/Secondary Effort Coordinator (Grant Manager). A new email window will generate in the system's default mail application, pre-populated with the Primary/Secondary Effort Coordinator (Grant Manager)'s email address.

 Send	To...	cheryl.peregoy@colostate.edu
	Cc...	
	Subject	

During the Certification process, the Principal Investigator should review all project information and payroll dollars and percentages for each employee on their project statement.

Ready for Certification Status

The Principal Investigator has four options:

Certify	
Partially Certify	
Certify and Revise Payroll	
Revise Payroll	

Option 1: Certify all payroll is accurately reflected on the Project Statement

The Principal Investigator can certify the percentages shown on the project statement are accurate for all employees for the period by clicking the checkboxes in the Certify column.

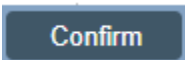
Project Statement for 5363722: Boulder County Carbon Sequestration Pilot Program (Q1 - FY20) : Effort from 7/1/2019 to 9/30/2019, due date 12/15/2019; Status: Ready for Certification										
Employee	Department	Object Code	Payroll Dollars	Payroll %	Cost Share Dollars	Cost Share %	Payroll + Cost Share Dollars	Payroll + Cost Share %	Certify	Revise Payroll
Boyack, Ty - 822184189	Natural Resource Ecology Laboratory - C...	5111-...	\$15.32	0 %	\$0.00	0 %	\$15.32	0%	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Breidenbach, Tamera - 831550028	Schl of Gbl Envrnmntal Sustainability-SA...	5611-...	\$115.80	61 %	\$0.00	0 %	\$115.80	61%	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Easter, Mark - 821100295	Natural Resource Ecology Laboratory - C...	5111-...	\$5,919.87	25 %	\$0.00	0 %	\$5,919.87	25%	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Stermer, Matthew - 821853803	Natural Resource Ecology Laboratory - C...	5111-...	\$3,754.43	36 %	\$0.00	0 %	\$3,754.43	36%	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Toureene, Shaley - 831868612	Natural Resource Ecology Laboratory - C...	5611-...	\$691.20	100 %	\$0.00	0 %	\$691.20	100%	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Get Help Confirm Save Home

The Confirm button will appear when one or more of the checkboxes in the Certify column is checked.



Clicking the icon under the word 'Certify will select all the checkboxes in the Certify column.



The PI will click the Confirm button to certify all percentages are accurate for the employees on the project statement.

The Attestation Statement will appear, listing all employees who are being certified. The PI must agree to this statement to complete the certification process.

Attestation

Account Title: CAREER: Flexibility, Constraints, and Selection in
Account Name: 5337024 - CAREER: Flexibility, Constraints, and
Period: Q2 - FY20
Certifier: Hoke, Kim - 828256472
Personnel Being Fleming, Rachel - 831992267

I certify that the salary charged, salary transfers (PPDAs) processed, and effort certified this period reasonably reflect the work performed on this sponsored project for the designated period; that I am the Principal Investigator or Delegate and have sufficient technical knowledge, and/or I am in a position that provides me with suitable means of verification that the work was performed.

Cancel I Agree



The statement is now in the status 'Certified' and will fall off the PI's work list.

Project Statement for 5337024: CAREER: Flexibility, Constraints, and Selection in Repeated Ear Loss and... Effort from 10/1/2019 to 12/31/2019; Status: Certified

Object	Payroll	Cost Share	Payroll + Cost	Payroll + Cost	Revise
--------	---------	------------	----------------	----------------	--------

Option 2: Partially Certify the Project Statement

The Principal Investigator can certify the percentages shown on the project statement are accurate for some employees for the period by clicking the checkboxes in the Certify column for those employees.

Project Statement for 5363722: Boulder County Carbon Sequestration Pilot Program (Q1 - FY20) Effort from 7/1/2019 to 9/30/2019, due date 12/15/2019; Status: Ready for Certification

Employee	Department	Object Code	Payroll Dollars	Payroll %	Cost Share Dollars	Cost Share %	Payroll + Cost Share Dollars	Payroll + Cost Share %	Certify	Revise Payroll	Action
Boyack, Ty	Natural Resource Ecology Laboratory - C...	5111-...	\$15.32	0 %	\$0.00	0 %	\$15.32	0%	<input checked="" type="checkbox"/>	<input type="checkbox"/>	\$
Breidenbach, Tamera	Schl of Gbl Envrnmtal Sustainability-SA...	5611-...	\$115.80	61 %	\$0.00	0 %	\$115.80	61%	<input checked="" type="checkbox"/>	<input type="checkbox"/>	\$
Easter, Mark	Natural Resource Ecology Laboratory - C...	5111-...	\$5,919.87	25 %	\$0.00	0 %	\$5,919.87	25%	<input type="checkbox"/>	<input type="checkbox"/>	\$
Stermer, Matthi	Natural Resource Ecology Laboratory - C...	5111-...	\$3,754.43	36 %	\$0.00	0 %	\$3,754.43	36%	<input type="checkbox"/>	<input type="checkbox"/>	\$
Tourene, Shaley	Natural Resource Ecology Laboratory - C...	5611-...	\$691.20	100 %	\$0.00	0 %	\$691.20	100%	<input type="checkbox"/>	<input type="checkbox"/>	\$

Get Help Confirm Save Home

The PI will click the Confirm button to certify the percentages for the employees with the checkboxes checked in the Certify column.

The Attestation Statement will show only those employees with the Certify checkbox selected. These employees will not have to be certified again. The PI must agree to this statement.

The statement remains in the 'Ready for Certification' status and will appear on their work list until all employees on the statement are certified.

Attestation

Account Title: Boulder County Carbon Sequestration Pilot Program
Account Name: 5363722 - Boulder County Carbon Sequestration Pilot
Period: Q1 - FY20
Certifier: Paustian, Keith H -
Personnel Being Boyack, Ty -
Breidenbach, Tamera

I certify that the salary charged, salary transfers (PPDAs) processed, and effort certified this period reasonably reflect the work performed on this sponsored project for the designated period; that I am the Principal Investigator or Delegate and have sufficient technical knowledge, and/or I am in a position that provides me with suitable means of verification that the work was performed.

Cancel I Agree

Option 3: Certify and Revise Payroll

The Principal Investigator can certify the percentages shown on the project statement are accurate for some employees by clicking the checkboxes in the Certify column for those employees. They can request a payroll revision for the remaining employees by clicking the checkboxes in the Revise Payroll column.

Project Statement for 5363722: Boulder County Carbon Sequestration Pilot Program (Q1 - FY20) ; Effort from 7/1/2019 to 9/30/2019, due date 12/15/2019; Status: Ready for Certification

Employee	Department	Object Code	Payroll Dollars	Payroll %	Cost Share Dollars	Cost Share %	Payroll + Cost Share Dollars	Payroll + Cost Share %	Certify	Revise Payroll	Action
Boyack, Ty	Natural Resource Ecology Laborator...	5111-...	\$15.32	0 %	\$0.00	0 %	\$15.32	0%	<input checked="" type="checkbox"/>	<input type="checkbox"/>	\$
Breidenbach, Tame	Schl of Gbl Envrnmntal Sustainability...	5611-...	\$115.80	61 %	\$0.00	0 %	\$115.80	61%	<input type="checkbox"/>	<input checked="" type="checkbox"/>	\$
Easter, Mark	Natural Resource Ecology Laborator...	5111-...	\$5,919.87	25 %	\$0.00	0 %	\$5,919.87	25%	<input checked="" type="checkbox"/>	<input type="checkbox"/>	\$
Stermer, Matthew - 001000000	Natural Resource Ecology Laborator...	5111-...	\$3,754.43	36 %	\$0.00	0 %	\$3,754.43	36%	<input type="checkbox"/>	<input checked="" type="checkbox"/>	\$
Toureene, Shaley	Natural Resource Ecology Laborator...	5611-...	\$691.20	100 %	\$0.00	0 %	\$691.20	100%	<input checked="" type="checkbox"/>	<input type="checkbox"/>	\$

Get Help Confirm & Revise Payroll Save Home

In the example above, the PI is certifying the percentages are correct for the first and third employees while requesting a payroll revision for the second and fourth employees.

When the boxes in the Revise Payroll column are checked, the Payroll % and Cost Share % columns become editable.

Project Statement for 5363722: Boulder County Carbon Sequestration Pilot Program (Q1 - FY20) ; Effort from 7/1/2019 to 9/30/2019, due date 12/15/2019; Status: Ready for Certification

Employee	Department	Object Code	Payroll Dollars	Payroll %	Cost Share Dollars	Cost Share %	Payroll + Cost Share Dollars	Payroll + Cost Share %	Certify	Revise Payroll	Action
Boyack, Ty	Natural Resource Ecology Laborator...	5111-...	\$15.32	0 %	\$0.00	0 %	\$15.32	0%	<input checked="" type="checkbox"/>	<input type="checkbox"/>	\$
Breidenbach, Tame	Schl of Gbl Envrnmntal Sustainability...	5611-...	\$115.80	61 %	\$0.00	0 %	\$115.80	61%	<input type="checkbox"/>	<input checked="" type="checkbox"/>	\$
Easter, Mark	Natural Resource Ecology Laborator...	5111-...	\$5,919.87	25 %	\$0.00	0 %	\$5,919.87	25%	<input checked="" type="checkbox"/>	<input type="checkbox"/>	\$
Stermer, Matthew - 001000000	Natural Resource Ecology Laborator...	5111-...	\$3,754.43	36 %	\$0.00	0 %	\$3,754.43	36%	<input type="checkbox"/>	<input checked="" type="checkbox"/>	\$
Toureene, Shaley	Natural Resource Ecology Laborator...	5611-...	\$691.20	100 %	\$0.00	0 %	\$691.20	100%	<input checked="" type="checkbox"/>	<input type="checkbox"/>	\$

Get Help Confirm & Revise Payroll Save Home

The Principal Investigator should input the percentage (whole number) of effort the employee should have been paid from the project, for the period, into the Payroll % and/or Cost Share % columns.

Payroll %	Cost Share Dollars	Cost Share %	Payroll %	Cost Share Dollars	Cost Share %	Payroll + Cost Share Dollars	Payroll + Cost Share %	Certify	Revise Payroll
0 %	\$0.00	0 %	0 %	\$0.00	0 %	\$15.32	0%	<input checked="" type="checkbox"/>	<input type="checkbox"/>
61 %	\$0.00	0 %	50 %	\$0.00	0 %	\$115.80	61%	<input type="checkbox"/>	<input checked="" type="checkbox"/>
25 %	\$0.00	0 %	25 %	\$0.00	0 %	\$5,919.87	25%	<input checked="" type="checkbox"/>	<input type="checkbox"/>
36 %	\$0.00	0 %	50 %	\$0.00	0 %	\$3,754.43	36%	<input type="checkbox"/>	<input checked="" type="checkbox"/>
100 %	\$0.00	0 %	100 %	\$0.00	0 %	\$691.20	100%	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Confirm & Revise Payroll Save Home

In the example above, two employees are being revised: the Revise Payroll checkbox is checked and the PI edited the percentages in the Payroll % column. The PI updated the Payroll percentage for the employees to 50%.

The Confirm and Revise Payroll button will appear after the Principal Investigator selects the checkboxes in both the Certify and Revise Payroll columns.

Project Statement for 5363722: Boulder County Carbon Sequestration Pilot Program (Q1 - FY20) ; Effort from 7/1/2019 to 9/30/2019, due date 12/15/2019; Status: Ready for Certification

Employee	Department	Object Code	Payroll Dollars	Payroll %	Cost Share Dollars	Cost Share %	Payroll + Cost Share Dollars	Payroll + Cost Share %	Certify	Revise Payroll	Action
Boyack, Ty -	Natural Resource Ecology Laborator...	5111-...	\$15.32	0 %	\$0.00	0 %	\$15.32	0%	<input checked="" type="checkbox"/>	<input type="checkbox"/>	\$
Breidenbach, Tame	Schl of Gbl Envrnmtal Sustainability...	5611-...	\$115.80	61 %	\$0.00	0 %	\$115.80	61%	<input type="checkbox"/>	<input checked="" type="checkbox"/>	\$
Easter, Mark -	Natural Resource Ecology Laborator...	5111-...	\$5,919.87	25 %	\$0.00	0 %	\$5,919.87	25%	<input checked="" type="checkbox"/>	<input type="checkbox"/>	\$
Stermer, Matthew - 821653883	Natural Resource Ecology Laborator...	5111-...	\$3,754.43	36 %	\$0.00	0 %	\$3,754.43	36%	<input type="checkbox"/>	<input checked="" type="checkbox"/>	\$
Tourene, Shaley -	Natural Resource Ecology Laborator...	5611-...	\$691.20	100 %	\$0.00	0 %	\$691.20	100%	<input checked="" type="checkbox"/>	<input type="checkbox"/>	\$

Get Help ➔ Confirm & Revise Payroll Save Home

Note: If the PI incorrectly clicked the Revise Payroll checkboxes, he/she can uncheck the box and the percentages will revert to the original amounts.

Attestation

Account Title: Integrating an Industrial Source and Commercial
 Account Name: 5302386 - Integrating an Industrial Source and
 Period: Q2 - FY20
 Certifier: Reardon, Kenneth F - 822555812
 Personnel Being: Adkins, Jaclyn - 829058154
 Menard, Zach - 827747628
 Shen, Chen - 830410071

only 'certified' personnel are displayed

I certify that the salary charged, salary transfers (PPDAs, this period reasonably reflect the work performed on designated period, that I am the Principal Investigator of technical knowledge, and/or I am in a position that provides verification that the work was performed.

Employee	Certify	Revise Payroll
Adkins, Jaclyn -	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Green, Ethan -	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Menard, Zach -	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Meyer, Peter -	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Peterson, Kennalyn -	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Shen, Chen -	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Cancel I Agree

After clicking the Confirm and Revise Payroll button, the Attestation Statement will appear, showing only those employees with the Certify checkbox selected. These employees will not have to be certified again. The PI must agree to this statement.



The statement is now in the status, 'Revision Requested'. The statement will no longer appear on the Principal Investigator's Work List. No further action is required by the Principal Investigator at this time.

Project Statement for 5392752: Sustained Permanency Planning Project Evaluation (Q2 - FY20) ; Effort from 10/1/2019 to 12/31/2019; Status: Revision Requested

A Project Statement Revision Requested task is created for the PI's Primary/Secondary Effort Coordinator (Grant Manager).

WORK LIST FOR Karmen Kelly

Welcome to the **ecrt** effort reporting system. The tabs below list all of the effort certification tasks that require your attention - whether it is certifying statements, processing statements, or following up on outstanding statements. To view and resolve the specific task, select the link in the task description.

Statements Awaiting Certification		Pending Payroll Tasks (2)	Assigned Accounts	
Type	Identifier	Name	Date	
Project Statement Revision Requested	5392752	Sustained Permanency Planning Proj...	02/06/2020 3:20 PM	
Project Statement Revision Requested	5392820	Homeward 2020 FUSE Evaluation	02/06/2020 3:18 PM	

Option 4: Revise Payroll

The Principal Investigator can request a payroll revision for all employees by clicking the checkboxes in the Revise Payroll column.



Select the icon under the Revise Payroll column to auto check all checkboxes.

Project Statement for 5363722: Boulder County Carbon Sequestration Pilot Program (Q1 - FY20) ; Effort from 7/1/2019 to 9/30/2019, due date 12/15/2019; Status: Ready for Certification

Employee	Department	Object Code	Payroll Dollars	Payroll %	Cost Share Dollars	Cost Share %	Payroll + Cost Share Dollars	Payroll + Cost Share %	Certify	Revise Payroll	Action
Boyack, Ty	Natural Resource Ecology Laborator...	5111-...	\$15.32	0 %	\$0.00	0 %	\$15.32	0%	<input type="checkbox"/>	<input checked="" type="checkbox"/>	\$
Breident	Schl of Gbl Envrnmntal Sustainability...	5611-...	\$115.80	61 %	\$0.00	0 %	\$115.80	61%	<input type="checkbox"/>	<input checked="" type="checkbox"/>	\$
Easter, Mai	Natural Resource Ecology Laborator...	5111-...	\$5,919.87	25 %	\$0.00	0 %	\$5,919.87	25%	<input type="checkbox"/>	<input checked="" type="checkbox"/>	\$
Stermer, M	Natural Resource Ecology Laborator...	5111-...	\$3,754.43	36 %	\$0.00	0 %	\$3,754.43	36%	<input type="checkbox"/>	<input checked="" type="checkbox"/>	\$
Tourene, Sh	Natural Resource Ecology Laborator...	5611-...	\$691.20	100 %	\$0.00	0 %	\$691.20	100%	<input type="checkbox"/>	<input checked="" type="checkbox"/>	\$

Get Help Revise Payroll Save Home

When the boxes in the Revise Payroll column are checked, the Payroll % and Cost Share % columns become editable.

NOTE: The PI does not have to edit any fields when choosing Revise Payroll, but does need to provide additional information to the department effort coordinator about why the information is incorrect, and how it needs to be changed. Editing these fields does not initiate the payroll correction process. Any changes to salary amounts or account allocations are made in the HR system and in KFS. Changed/corrected information is then fed to ecrt/ECC to update the project statement.

The Principal Investigator should input the percentage (whole number) of payroll the employee should have been paid from the project, for the period, into the Payroll % and/or Cost Share % columns.

Project Statement for 5363722: Boulder County Carbon Sequestration Pilot Program (Q1 - FY20) ; Effort from 7/1/2019 to 9/30/2019, due date 12/15/2019; Status: Ready for Certification

Employee	Department	Object Code	Payroll Dollars	Payroll %	Cost Share Dollars	Cost Share %	Payroll + Cost Share Dollars	Payroll + Cost Share %	Certify	Revise Payroll	Action
Boyack, Ty	Natural Resource Ecology Laborator...	5111-...	\$15.32	5 %	\$0.00	0 %	\$15.32	0%	<input type="checkbox"/>	<input checked="" type="checkbox"/>	\$
Breidenbach, Tan	Schl of Gbl Envrnmntal Sustainability...	5611-...	\$115.80	50 %	\$0.00	0 %	\$115.80	61%	<input type="checkbox"/>	<input checked="" type="checkbox"/>	\$
Easter, Ma	Natural Resource Ecology Laborator...	5111-...	\$5,919.87	30 %	\$0.00	0 %	\$5,919.87	25%	<input type="checkbox"/>	<input checked="" type="checkbox"/>	\$
Stermer, Matt	Natural Resource Ecology Laborator...	5111-...	\$3,754.43	30 %	\$0.00	0 %	\$3,754.43	36%	<input type="checkbox"/>	<input checked="" type="checkbox"/>	\$
Tourene, Sh	Natural Resource Ecology Laborator...	5611-...	\$691.20	100 %	\$0.00	0 %	\$691.20	100%	<input type="checkbox"/>	<input checked="" type="checkbox"/>	\$

Get Help Revise Payroll Save Home

The Revise Payroll button appears if all checkboxes in the Revise Payroll column are checked. The PI should click the button if a payroll revision is needed for all employees on the project statement.

Like **Option 3**, a revision requested task will be routed to the Primary/Secondary Effort Coordinator (Grant Manager) for review.

L. Revision Requested Task during the Certification Period

A revision requested task will then be routed to the Primary/Secondary Effort Coordinator (Grant Manager)'s Home Page under the Pending Payroll Tasks tab.

attention: Whether it is certifying statements, processing statements, or following up on outstanding statements, to view and resolve the specific task, select the link in the task description.

Statements Awaiting Certification	Pending Payroll Tasks (1)	Assigned Accounts
Type	Identifier	Name
Project Statement Revision Requested	5363722	Boulder County Carbon Sequestration...

The Primary/Secondary Effort Coordinator (Grant Manager) must decide whether to Approve or Reject the payroll revision request made by the Principal Investigator.

Project Statement for 5363722: Boulder County Carbon Sequestration Pilot Program (Q1 - FY20) ; Effort from 7/1/2019 to 9/30/2019; Status: Revision Requested

Employee	Department	Object Code	Payroll Dollars	Previous Payroll	Payroll %	Cost Share Dollars	Previous Cost Share	Cost Share %	Payroll + Cost Share Dollars	Payroll + Cost Share %	Certify	Revise Payroll	Action	
Boyack, J.	Natural Resource Ecology Laboratory - ...	5111-...	\$15.32	0%	5 %	\$0.00	0%	0 %	\$15.32	5%	<input type="checkbox"/>	<input checked="" type="checkbox"/>		
Breidenbach, Ta	Schl of Gbl Envrnmntal Sustainability-SA...	5611-...	\$115.80	61%	50 %	\$0.00	0%	0 %	\$115.80	50%	<input type="checkbox"/>	<input checked="" type="checkbox"/>		
Easter, Mar	Natural Resource Ecology Laboratory - ...	5111-...	\$5,919.87	25%	30 %	\$0.00	0%	0 %	\$5,919.87	30%	<input type="checkbox"/>	<input checked="" type="checkbox"/>		
Stermer, Matthe	Natural Resource Ecology Laboratory - ...	5111-...	\$3,754.43	36%	30 %	\$0.00	0%	0 %	\$3,754.43	30%	<input type="checkbox"/>	<input checked="" type="checkbox"/>		
Toureene, Shal	Natural Resource Ecology Laboratory - ...	5611-...	\$691.20	100%	100 %	\$0.00	0%	0 %	\$691.20	100%	<input type="checkbox"/>	<input checked="" type="checkbox"/>		
												<div>Reject</div>	<div>Approve</div>	<div>Home</div>

The Primary/Secondary Effort Coordinator (Grant Manager) should review the percentages in the Payroll % and Cost Share % columns (those which the Principal Investigator requested) and compare them to the those shown in the Previous Payroll and Previous Cost Share columns (the original percentages).

Payroll Dollars	Previous Payroll	Payroll %	Cost Share Dollars	Previous Cost Share	Cost Share %	Payroll + Cost Share Dollars	Payroll + Cost Share %
\$15.32	0%	5 %	\$0.00	0%	0 %	\$15.32	5%
\$115.80	61%	50 %	\$0.00	0%	0 %	\$115.80	50%
\$5,919.87	25%	30 %	\$0.00	0%	0 %	\$5,919.87	30%
\$3,754.43	36%	30 %	\$0.00	0%	0 %	\$3,754.43	30%
\$691.20	100%	100 %	\$0.00	0%	0 %	\$691.20	100%

If a payroll revision **does not need to occur**, the Primary/Secondary Effort Coordinator (Grant Manager) should select **Reject**. The statement will then return to the 'Ready for Certification' status, the percentages will revert back to their original state, and the statement will appear back on the Principal Investigator's Home Page.

Project Statement for 5363722: Boulder County Carbon Sequestration Pilot Program (Q1 - FY20)							; Effort from 7/1/2019 to 9/30/2019; Status: Revision Requested							
SEP														
Employee	Department	Object Code	Payroll Dollars	Previous Payroll	Payroll %	Cost Share Dollars	Previous Cost Share	Cost Share %	Payroll + Cost Share Dollars	Payroll + Cost Share %	Certify	Revise Payroll	Action	
Boyack, J.	Natural Resource Ecology Laboratory - ...	5111-...	\$15.32	0%	5 %	\$0.00	0%	0 %	\$15.32	5%	<input type="checkbox"/>	<input checked="" type="checkbox"/>		
Breidenbach, Ta	Schl of Gbl Envrnmntal Sustainability-SA...	5611-...	\$115.80	61%		\$0.00	0%		\$115.80	50%	<input type="checkbox"/>	<input checked="" type="checkbox"/>		
Toureene, Shal	Natural Resource Ecology Laboratory - ...	5611-...	\$691.20	100%	100 %	\$0.00	0%	0 %	\$691.20	100%	<input type="checkbox"/>	<input checked="" type="checkbox"/>		
												Reject	Approve	Home

Note: The Primary/Secondary Effort Coordinator (Grant Manager) should notify the PI that the statement is now Ready for Certification. The PI does not receive an email when the statement returns to "Ready for Certification" from the "Revision Requested" status.

If a payroll revision **does need to occur**, the Grant Manager should select **Approve**. The department should then create the PPDA outside the system.

Note: PPDA's are NOT created or routed in ecrt.

Project Statement for 5363722: Boulder County Carbon Sequestration Pilot Program (Q1 - FY20) ; Effort from 7/1/2019 to 9/30/2019; Status: Revision Requested

Employee	Department	Object Code	Payroll Dollars	Previous Payroll	Payroll %	Cost Share Dollars	Previous Cost Share	Cost Share %	Payroll + Cost Share Dollars	Payroll + Cost Share %	Certify	Revise Payroll	Action
Boyack, [REDACTED]	Natural Resource Ecology Laboratory - ...	5111-...	\$15.32	0%	5 %	\$0.00	0%	0 %	\$15.32	5%	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Breidenbach, Ta...	Schl of Gbl Environmental Sustainability SA	5611-	\$115.80	61%		\$0.00	0%		\$115.80	50%	<input type="checkbox"/>	<input type="checkbox"/>	
Toureene, Shai	Natural Resource Ecology Laboratory - ...	5611-...	\$691.20	100%	100 %	\$0.00	0%	0 %	\$691.20	100%	<input type="checkbox"/>	<input type="checkbox"/>	

Reject

Approve

Home

Once the revision requested task is either Rejected or Approved, the task will then fall off the Pending Payroll Tasks tab on the Home Page.

M. Revision Pending Task during the Certification Period

All PPDA's must be completed outside the system. After the payroll adjustment is loaded into ecrt, a **Process Project Statement Revision** task will be created and appear on the Primary/Secondary Effort Coordinator (Grant Manager)'s Home Page under the Pending Payroll Tasks tab.

Statements Awaiting Certification		Pending Payroll Tasks (1)	Assigned Accounts
Type	Identifier	Name	
Process Project Statement Revision	5378084	Sustainable Land Management and Climat...	

The project statement will update to the status 'Revision Pending' meaning a payroll adjustment is pending for the project statement.

Project Statement for 5378084: Sustainable Land Management and Climate Change Mitigation Co-B...	Effort from 10/1/2019 to 12/31/2019; Status: Revision Pending
--	---

From the Pending Payroll Tasks tab, click on the hyperlink **Process Project Statement Revision**

The Primary/Secondary Effort Coordinator (Grant Manager) should review the new payroll for accuracy. The new payroll should reflect the PPDA that has been recently completed.

Project Payroll Revision

The Project Payroll Revision page presents to administrators payroll transactions that impact open project statements and allows them to determine how to treat those transactions. The actions a user can take, represented by the presence of buttons displayed below the transaction summary, are determined by the institution's configured thresholds and the responsibilities assigned to the user's role.

Account Number:5378084

Period of Performance:Q2 - FY20

Department:Soil + Crop Sciences

Account Name:Sustainable Land Management and Climate Change Mitigation Co-Benefits (SLM-CMCMC)

Principal Investigator:Paustian, Keith H - 821012865

Grant Manager:Scheffing, Jennifer S - 830474485 (PEC)

Project Payroll Reconciliation for Period of Performance - 5378084, Q2 - FY20 10/01/2019 to 12/31/2019

Employee	Object Code	Summarized Adjustment	Original Payroll + Cost Share \$	New Payroll + Cost Share \$	Original Percentage	Original Percentage vs New Payroll + Cost Share \$ Variance
Dheenadayan Sivakami, Guhan - 828982141	5111-Adm Pro Sal	\$ (\$3,000.00)	\$8,588.41	\$5,588.41	\$8,588.41	\$3,000.00
Paustian, Keith - 821012865 ***	5111-Adm Pro Sal	\$ (\$3,000.00)	\$0.00	(\$3,000.00)	\$0.00	\$3,000.00
Easter, Mark - 821100295	5111-Adm Pro Sal		\$7,999.83	\$7,999.83	\$7,919.83	(\$80.00)
Paustian, Keith - 821012865	5011-Faculty Sal		\$4,113.89	\$4,113.89	\$4,113.89	\$0.00
Sutton, Ben - 825721765	5111-Adm Pro Sal		\$18,404.66	\$18,404.66	\$18,404.66	\$0.00
Swan, Amy - 823097626	5111-Adm Pro Sal		\$1,636.50	\$1,636.50	\$1,636.50	\$0.00
Total		(\$6,000.00)				

View Project Statement

Post

Post & Maintain

Revised (minor updates) by C Carsten, CSU, June 2022

The following fields appear on the task:

Column Name	Description
Employee	Employee name and id that the new payroll affects
Object code	Employee object code
Summarized Adjustment	The dollar amount added or deleted from the line item
Original Payroll + Cost Share \$	The dollar value for original payroll/cost share amounts.
New Payroll + Cost Share \$	Dollar value for for adjusted payroll/cost share amounts.
Original \$	The original amount of the salary
Original \$ vs. New Payroll + Cost Share \$ Variance	The calculated variance between the original and the changed value.

The Primary/Secondary Effort Coordinator (Grant Manager) will have the option to **Post** or **Post and Maintain** the Revision Pending task.

The Effort Coordinator will have the option to **Post** or **Post and Maintain** the Revision Pending task.

Post

Select the **Post** button if the payroll displayed on the Revision Pending task accurately reflects the payroll for the employee for the project for the period. The payroll will update on the project statement after the Post button is clicked. The project statement will route to the 'Ready for Certification' status and appear on the Principal Investigator's work list.

Post & Maintain

Select the **Post & Maintain** button **only if** the payroll displayed on the Revision Pending task **does not accurately reflect** the payroll for the employee for the project for the period and another payroll adjustment needs to occur. **The payroll displayed on the task will post to the project statement but the statement will remain in the 'Revision Requested' status.** The statement will remain on hold and not route to the next step in the workflow.

Once the payroll is accurate on the project statement, the Primary/Secondary Effort Coordinator (Grant Manager) should click the Post button to post the new payroll to the statement. The statement will then route to the status 'Ready for Certification'.

Project Statement for 5378084: Sustainable Land Management and Climate Change Mitigation Co-Be...; Effort from 10/1/2019 to 12/31/2019, due date 3/15/2020; Status: Ready for Certification

Employee	Department	Object Code	Payroll Dollars	Payroll %	Cost Share Dollars	Cost Share %	Payroll + Cost Share Dollars	Payroll + Cost Share %	Certify	Revise Payroll	Action
Dheenadayalan Sivakami, Guhan - 8...	Natural Resource Ecology Laboratory...	5111-...	\$5,588.41	48 %	\$0.00	0 %	\$5,588.41	48%	<input type="checkbox"/>	<input type="checkbox"/>	\$
Easter, Mai	Natural Resource Ecology Laboratory...	5111-...	\$7,999.83	33 %	\$0.00	0 %	\$7,999.83	33%	<input checked="" type="checkbox"/>	<input type="checkbox"/>	\$
Paustian, Ki	Soil + Crop Sciences - CO-1170	5011-...	\$4,113.89	9 %	\$0.00	0 %	\$4,113.89	9%	<input type="checkbox"/>	<input type="checkbox"/>	\$
Paustian, Ki	Soil + Crop Sciences - CO-1170	5111-...	\$-3,000.00	-6 %	\$0.00	0 %	\$-3,000.00	-6%	<input type="checkbox"/>	<input type="checkbox"/>	\$
Sutton, Ber	Soil + Crop Sciences - CO-1170	5111-...	\$18,404.66	95 %	\$0.00	0 %	\$18,404.66	95%	<input checked="" type="checkbox"/>	<input type="checkbox"/>	\$
Swan, An	Natural Resource Ecology Laboratory...	5111-...	\$1,636.50	10 %	\$0.00	0 %	\$1,636.50	10%	<input checked="" type="checkbox"/>	<input type="checkbox"/>	\$

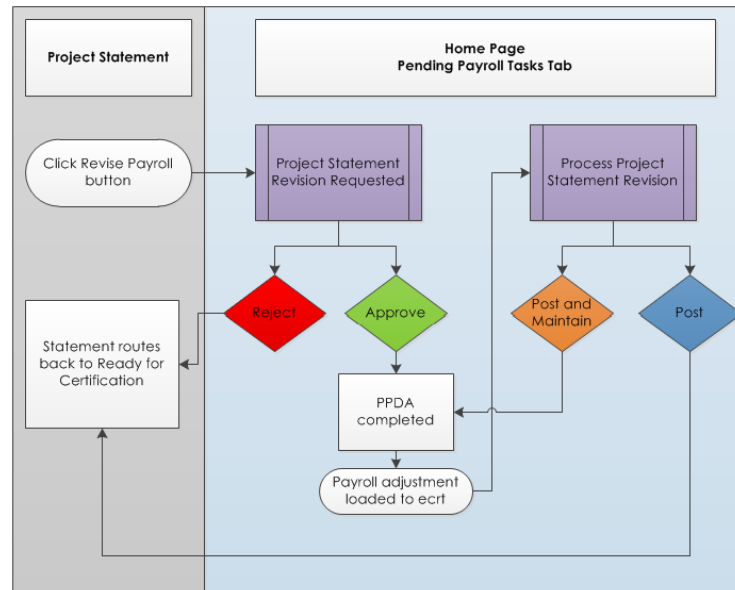
Get Help

Save

Home

The project statement updated to reflect the PPDA. The PI can now Certify the remaining employees on the project statement.

N. Revision Requested Tasks and Revision Pending Tasks Workflow – Certification Period



O. Reopening a Project Statement

If a payroll transaction occurs that effects a **certified** project statement, the PI may need to recertify the statement.

If the statement is **reopened**, the PI will receive an email from ecrt noting the statement was reopened and is 'Ready for Certification, Re-opened by Payroll Adjustment'. The statement will appear on the PI's Work List when he/she logs in.

Statements Awaiting Certification (2)							
My Quarterly Project Statements							
Top of Page Associated Quarterly Project Statements (View Only)							
Project Title	Project Account	Sponsor	Period	Due Date	Status	Staff	
Integrating an Industrial Source and C...	5302429	DOE-US Departmen...	Q2 - FY20	3/15/2020	Ready for Certification, Re-Opened...		
Low-cost, Easy-to-integrate, and Relia...	5301864	University of Californ...	Q2 - FY20	3/15/2020	Ready for Certification, Re-Opened...		

Project Statement for 5302429: Integrating an Industrial Source and Commercial Algae Farm with Inno... Effort from 10/1/2019 to 12/31/2019, due date 3/15/2020										Status: Ready for Certification, Re-Opened b...		
On Hold: <input type="checkbox"/> Override Status												
Employee	Department	Object Code	Payroll Dollars	Payroll %	Cost Share Dollars	Cost Share %	Payroll + Cost Share Dollars	Payroll + Cost Share %	Certify	Revise Payroll	Action	
Greene, Jona	Mechanical Engineering - CO-1374	5111-...	\$0.00	0 %	\$0.00	0 %	\$0.00	0%	<input type="checkbox"/>	<input type="checkbox"/>	\$	
Quinn, Jasi	Mechanical Engineering - CO-1374	5011-...	\$1,282.49	3 %	\$0.00	0 %	\$1,282.49	3%	<input type="checkbox"/>	<input type="checkbox"/>	\$	

P. Appendix 1: Payroll Report

The Payroll Report is a payroll summary report for an individual, department or account and a date range.

Navigate to the Reports Page > Reporting > Select Payroll/Cost Share from the Category header > Find **Payroll Report** in the Reports header

Reporting

Home Certify Manage **Reports** Administration Links

Reporting

This page lists all reports that are available through the application.

Category	Reports	Description
Management	Certifier Payroll Summary Report	
Payroll/Cost Share	Payroll Report	The Payroll Report is a payroll summary report for a specific individual, Department or Account and date range.
	PI and Staff Payroll Report	

Payroll Report by Department -

Parameters Results

Employee:

School / Department: **Soil + Crop Sciences**
Expand Search

Account: ☒ Active ☐ Inactive

Search By Statement Type: ☒ Base ☐ Non-IBS ☐ Other

Date By: ☐ Dates ☒ **Employee Type**

Employee Type: Quarterly ▼

Period: 10/1/2019 to 12/31/2019 ▼

In the example above, we are running the payroll report for the Soil + Crop Sciences Department, for all employees in that department who are included the Quarterly employee type, and for the period 10/1/2019 to 12/31/2019.

Type in the first three characters into the desired parameter field (in our example, the Department field). This will populate a drop down menu from which you can select the Department Name. Search is restricted to departments for which the user has department effort coordinator or viewer permission.

Note: All employees will be included under the Quarterly employee type.

Run Report

After you input all desired parameters, click the Run Report button.

ParametersResults

- Pay Period View
- Account View

1,484 items found, displaying 1 to 300.

[First/Prev] 1, 2, 3, 4, 5 [Next/Last]

Employee ID	First Name	Middle Init.	Last Name	Department	Department Number	Grant	Pay Period	Payroll	Pay %	Pay Type	Employee Type	Statement Type
	Zaki		Afshar	Soil + Crop Sciences	CO-1170	5360061 - Wheat Breeding	10/01/2019 to 10/31/2019	\$2,136.00	33 %		Quarterly	Base
							11/01/2019 to 11/30/2019	\$2,136.00	33 %		Quarterly	Base
							12/01/2019 to 12/31/2019	\$2,136.00	33 %		Quarterly	Base
Subtotal								\$6,408.00	100 %			
Certifier Total for Period								\$6,408.00	100 %			

Note: This report can be exported to excel using the hyperlink at the bottom right of the report.

[Excel](#) | [XML](#) | [PDF](#) | [RTF](#)

The payroll report displays the following columns:

Employee ID	Employee ID
First Name	First Name of Employee
Middle Init.	Middle Initial of Employee
Last Name	Last Name of Employee
Department	Home department of the corresponding employee
Department Number	Home department number of the corresponding employee
Grant	The account/project the corresponding employee was paid from
Pay Period	The pay period which payroll hit the corresponding grant
Payroll	Dollar amount of payroll paid from the grant for the pay period
Pay %	The percentage of payroll dollars as it relates to the employee's total pay for the period
Pay Type	Additional details about the payroll transaction (see below)
Employee Type	Quarterly
Statement Type	Base

The Pay Type column provides additional details about the payroll transaction for the corresponding pay period.

Example: DMIP-PPDA--5301232-1369550

The string is defined as follows:

Subaccount – PPDA – Project Account – Cost Share Account

[Payroll Report by Employee –](#)

To view payroll for an employee, input the employee's name or employee ID in the Employee field.

Parameters

Results

Employee:

Casey Dylan M

School / Department:

Expand Search

Account:

Active

Inactive

Search By Statement Type:

Base

Non-IBS

Other

Date By:

Dates

Employee Type

Employee Type:

Quarterly

Period:

10/1/2019 to 12/31/2019

The report will show the pay that was charged to each account during each pay period within the period defined in the parameters, the total amounts charged to each account during the period, and the percent of total pay during the period for each account.

Parameters

Results

Pay Period View

Account View

3 items found, displaying all items.

Employee Id	First Name	Middle Init	Last Name	Department	Department Number	Pay Period	Grant	Payroll	Pay %	Pay Type	Employee Type	Statement Type
	Dylan	M	Casey	Soil + Crop Sciences	CO-1170	10/01/2019 to 10/31/2019	5392771 - Next Generation Technology for Monitoring Edge-of-Field Water Quality in Organic Agriculture	\$1,985.00	33 %		Quarterly	Base
						Subtotal		\$1,985.00	33 %			
						11/01/2019 to 10/31/2019	5392771 - Next Generation Technology for Monitoring Edge-of-Field Water Quality in Organic Agriculture	\$1,985.00				

The user running this report must be associated to the employee's Home Department to run the payroll report for that employee.

Parameters

Results

Pay Period View

Account View

The report defaults on an [Account View](#) showing the employee's payroll amount broken-down by account.

Click the [Pay Period View](#) hyperlink at the top left of the report to view all payroll for the employee for the period, broken-down by pay period.

The payroll report displays the following columns:

Employee ID	Employee ID
First Name	First Name of Employee
Middle Init.	Middle Initial of Employee
Last Name	Last Name of Employee
Department	Home department of the corresponding employee
Department Number	Home department number of the corresponding employee
Grant	The account/project the corresponding employee was paid from
Pay Period	The pay period which payroll hit the corresponding grant
Payroll	Dollar amount of payroll paid from the grant for the pay period
Pay %	The percentage of payroll dollars as it relates to the employee's total pay for the period
Pay Type	Additional details about the payroll transaction (see below)
Employee Type	Quarterly
Statement Type	Base

Payroll Report by Account –

To view payroll for an account, enter the account number in the Account field. The Active radio button should be selected if the project's end date has not passed the current date. The Inactive radio button should be selected if the project's end date has passed the current date.

The screenshot shows the 'Parameters' tab of the 'Payroll Report by Account' form. The 'Account' field contains '537' and the text 'start typing the account #'. A dropdown menu is open, displaying a list of account numbers and their corresponding project names. The 'Active' radio button is selected, and the 'Inactive' radio button is unselected.

Parameters | **Results**

Employee:

School / Department:

[Expand Search](#)

Account: 537 start typing the account # ☐ Active ☐ Inactive

Search By Statement Type: 1577270 - CSA(5373933-1577210) FFAR THEME PROJECT: ITC: Unde
5379529 - The impact of nutrition and metabolic capacity on
5374102 - CSA(5301358) Genetic Trait to Reduce Glyphosate Tr
5379526 - Cooperative Agricultural Pest Survey (CAPS) Progra
1562290 - CSA(5379529-1562210) The impact of nutrition and m
5379571 - Design, develop and deploy digital data management
5378084 - Sustainable Land Management and Climate Change Mit
1364474 - CSA(5379529-1305420) The impact of nutrition and m
1591770 - CSA(5375519-1591760) Monitoring Long Term Preserva
5379523 - Rinskor + Aminopyralid (WG: 60+600 g ai(ae)/kg) fo

Date By:

Dates:

If the search returns no results, the account may be 'inactive' (the end date is before the date the report is being requested).

The screenshot shows the 'Parameters' tab of the 'Payroll Report by Account' form. The 'Account' field contains '5370'. The 'Inactive' radio button is selected, and the 'Active' radio button is unselected. The 'Search By Statement Type' dropdown is open, showing a list of account numbers and their corresponding project names.

Parameters | **Results**

Employee:

School / Department:

[Expand Search](#)

Account: 5370 ☐ Active ☒ Inactive

Search By Statement Type: 5370001 - The Role of Hybridization in Biological Control of

The report will show the list of employees paid from the account during the date range selected. The report also shows the total payroll dollar amount paid from the account for the date range selected.

The screenshot shows the 'Results' tab of the 'Payroll Report by Account' form. The table displays a list of employees paid from the account during the date range selected. The table has 13 columns: Employee ID, First Name, Middle Init., Last Name, Department, Department Number, Grant, Pay Period, Payroll, Pay %, Pay Type, Employee Type, and Statement Type. The first row shows an employee named Allison Blyton, Department SOIL + Crop Sciences, Department Number CO-1170, Grant 5379522 - Drivers and Indicators of Soil Health in Semi-Arid Agroecosystems: Addressing the Soil Carbon Dilemma through the Lens of Microbes and Soil Physical Structure, Pay Period 09/15/2018 to 09/28/2018, Payroll \$99.59, Pay % 1%, Pay Type Quarterly, Employee Type Base, and Statement Type Base. The table also shows the total payroll dollar amount paid from the account for the date range selected.



Parameters | **Results**




• Pay Period View
• Account View


176 items found, displaying all items.

Employee ID	First Name	Middle Init.	Last Name	Department	Department Number	Grant	Pay Period	Payroll	Pay %	Pay Type	Employee Type	Statement Type
004904374	Allison	I	Blyton	Soil + Crop Sciences	CO-1170	5379522 - Drivers and Indicators of Soil Health in Semi-Arid Agroecosystems: Addressing the Soil Carbon Dilemma through the Lens of Microbes and Soil Physical Structure	09/15/2018 to 09/28/2018	\$99.59	1 %	Quarterly	Base	Base
							09/29/2018 to 10/12/2018	\$222.76	2 %	Quarterly	Base	Base
							10/13/2018 to 10/26/2018	\$284.28	3 %	Quarterly	Base	Base
							10/27/2018 to 11/09/2018	\$237.71	2 %	Quarterly	Base	Base
							11/10/2018 to 11/23/2018	\$347.53	3 %	Quarterly	Base	Base

Run the Payroll Report directly from the Project Statement:

From the project statement, select the  or the  icon to view more payroll information.

Project Statement for 5379522: Drivers and Indicators of Soil Health in Semi-Arid Agroecosystems... Effort from 1/1/2020 to 3/31/2020, due date 6/15/2020, Status: Building (not yet ready for cert...)											
Employee	Department	Object Code	Payroll Dollars	Payroll %	Cost Share Dollars	Cost Share %	Payroll + Cost Share Dollars	Payroll + Cost Share %	Certify	Revise Payroll	Action
Blyton, Allison	Soil + Crop Sciences - CO-1170	5611-...	\$611.27	18 %	\$0.00	0 %	\$611.27	18%	<input type="checkbox"/>	<input type="checkbox"/>	
Cotrufo, Frances...	Soil + Crop Sciences - CO-1170	5011-...	\$595.26	2 %	\$0.00	0 %	\$595.26	2%	<input type="checkbox"/>	<input type="checkbox"/>	
Eschler, Nik...	Soil + Crop Sciences - CO-1170	5581-...	\$228.62	9 %	\$0.00	0 %	\$228.62	9%	<input type="checkbox"/>	<input type="checkbox"/>	


 Click this icon to generate the payroll report for the employee. The payroll report shows the payroll that appears on the project statement.


Parameters Results											
<ul style="list-style-type: none"> Pay Period View Account View 											
6 items found, displaying all items.											
Employee ID	First Name	Middle Init.	Last Name	Department	Department Number	Grant	Pay Period	Payroll	Pay %	Pay Type	Employment Type
	Allison	I	Blyton	Soil + Crop Sciences	CO-1170	5379522 - Drivers and Indicators of Soil Health in Semi-Arid Agroecosystems: Addressing the Soil Carbon Dilemma through the Lens of Microbes and Soil Physical Structure	12/21/2019 to 01/03/2020	\$289.43	9 %	Quarter	

The report defaults on an Account View showing the employee's payroll amount broken-down by pay period.

Parameters	Results
<ul style="list-style-type: none"> Pay Period View Account View 	


Click the [Pay Period View](#) hyperlink at the top left of the report (under the Parameters and Results tabs) to view all payroll for the employee for the period, broken-down by pay period.

 Click this icon to view the employee's 100% payroll for the period.

Cost Share %	Payroll + Cost Share Dollars	Payroll + Cost Share %	Certify	Revise Payroll	Action
	\$611.27	18%	<input type="checkbox"/>	<input type="checkbox"/>	

close

Project Payroll Summary - Q3 - FY20

Allison I Blyton 

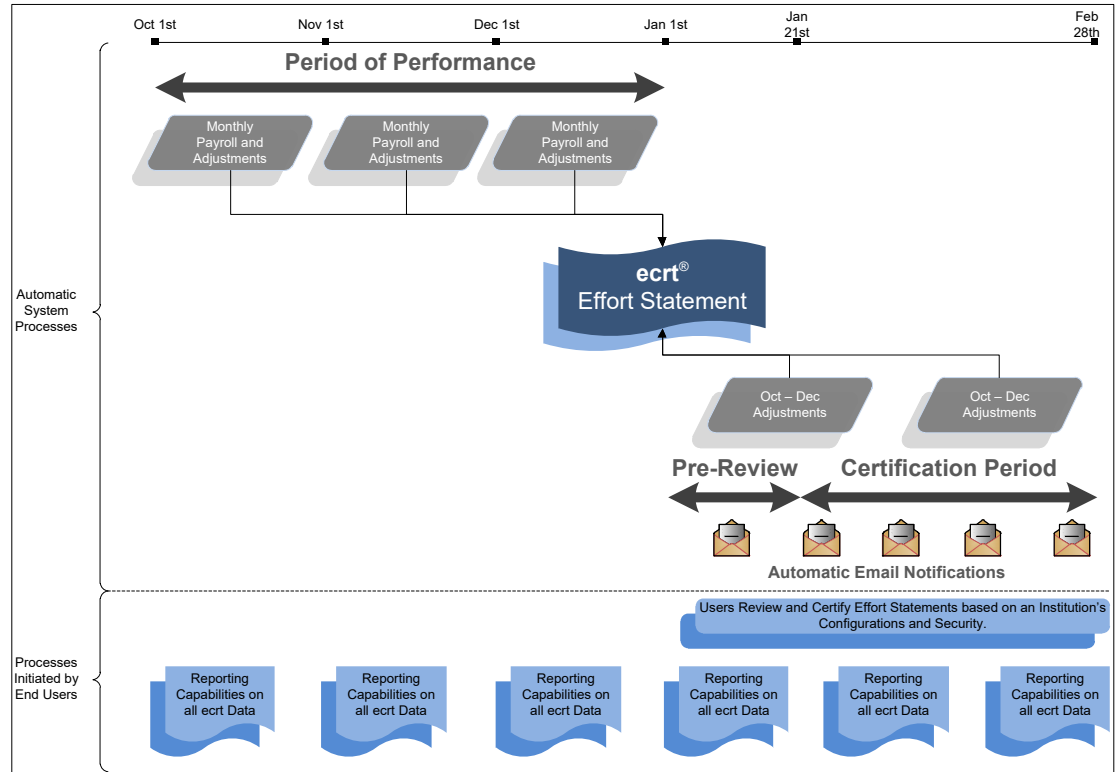
Project Name	Payroll + Cost Share Dollars	Payroll + Cost Share %
5379522-Drivers and Indic...	\$611.27	18%
5392785-Microbial Carbon...	\$131.07	4%
5344405-Determining the ...	\$1,511.03	45%
5344485-Determination of ...	\$229.63	7%
2603470-Customer Servic...	\$849.72	25%
Total:	\$3,332.72	100.00%

Q. Appendix 2: Roles and Responsibilities

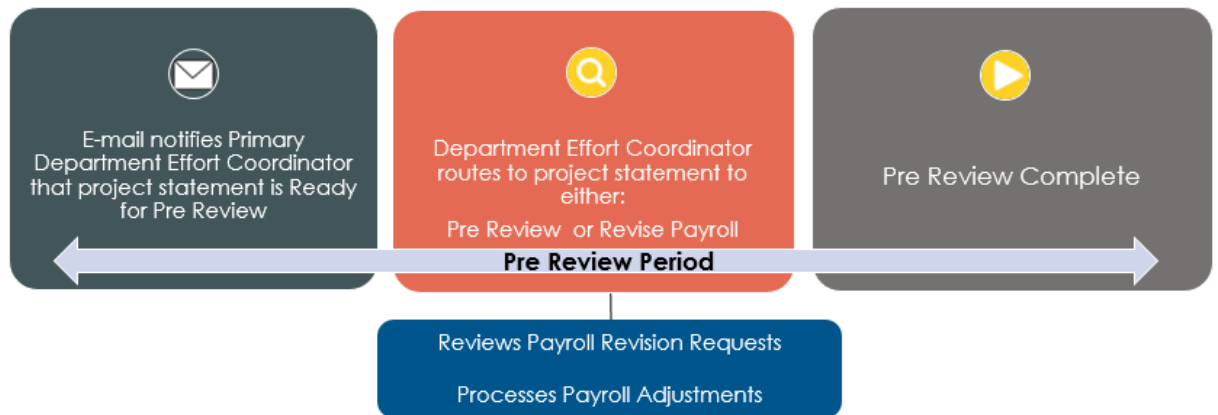
ecrt Roles	Responsibilities	Notes
College Effort Coordinator	<ul style="list-style-type: none"> - Oversight of departments - Manage Effort Coordinators 	
Primary Effort Coordinator	<ul style="list-style-type: none"> - Pre-review project certifications - Review Pending Payroll tasks 	<ul style="list-style-type: none"> - One per dept - System refers to as Grant Manager
Secondary Effort Coordinator	<ul style="list-style-type: none"> - Pre-review project certifications - Review Pending Payroll tasks 	<ul style="list-style-type: none"> - Can have multiple per dept - System refers to as Grant Manager
PI/Certifier	<ul style="list-style-type: none"> - Certify project statements 	
Functional System Administrator	<ul style="list-style-type: none"> - Maintain system - Customer service - Review Pending Payroll tasks 	

R. Appendix 3: Workflows

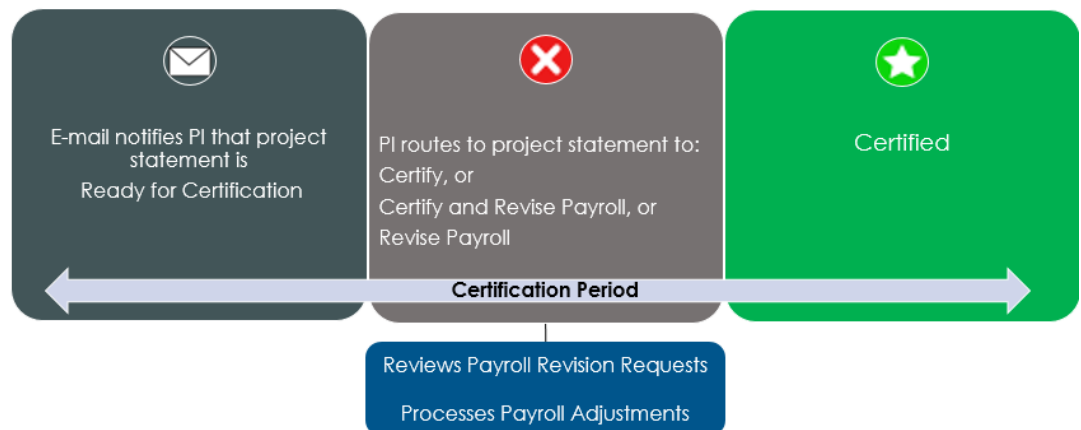
System Process Workflow



Effort Coordinator Workflow – Pre Review Period



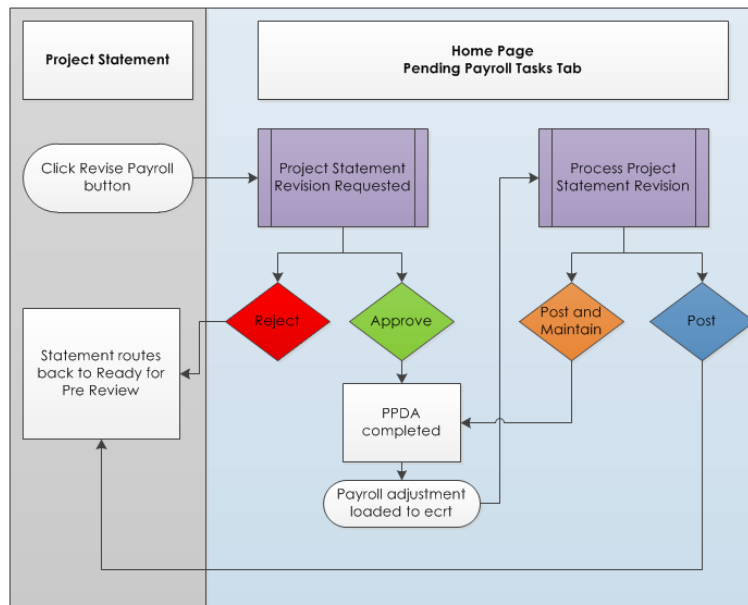
Principal Investigator Workflow – Certification Period



Non-sponsored Accounts Workflow – Certification Period



Revision Requested and Revision Pending Tasks Workflow – Pre Review



Revision Requested and Revision Pending Tasks Workflow – Certification

