Principal Investigator ecrt Quick Guide

Logging into ecrt

Please note: Project statement information in ecrt is available to review at any time. The only time a PI can take action in a statement is during the Certification period. See **Quick Guide Appendix A** for access instructions outside of the certification period.

This quick guide covers only the full certification of all employee line items for a project statement. Revise payroll and partial certification options are covered in the full PI guide.

The Principal Investigators will receive an automated email from the system once the Certification Period begins. The email will provide a link to the system and may prompt the user to enter in their CSU login credentials.

eID Login

eName: _____

Password: _____

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

Understanding the Certification Process
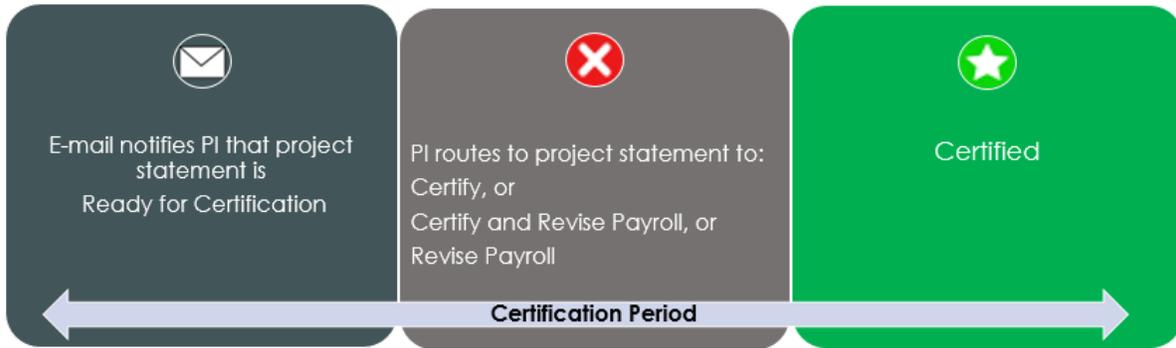
How to Certify a Project Statement

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 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**.

## <u>Certify</u> 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.

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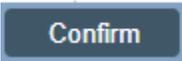
 The PI will click the **Confirm** button to certify all percentages are accurate for the employees on the project statement.

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

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

Repeat steps as needed and ensure that all project statements are certified before logging out.

** For any statements that can't be completely certified, see the full PI guide for revise payroll and partial certification steps. **

For more information about the process or to request help, use the Links menu:

Quick Guide Appendix A:

Statements for a current period and previously certified statements for an account are always available in ecrt.

Option 1: Certify tab > My Project Statements

➢ This will display a Work List box. Use to see statements for the current period in 'Building', 'Ready for Pre Review', or 'Pre Reviewed' status.
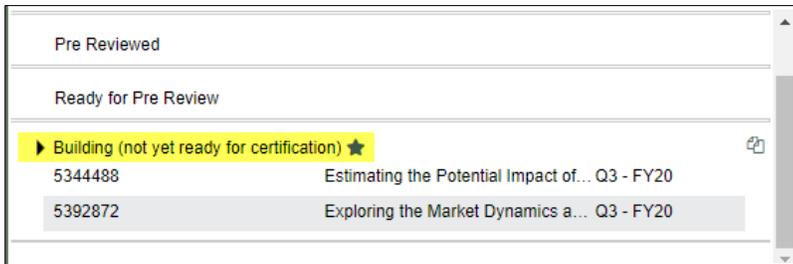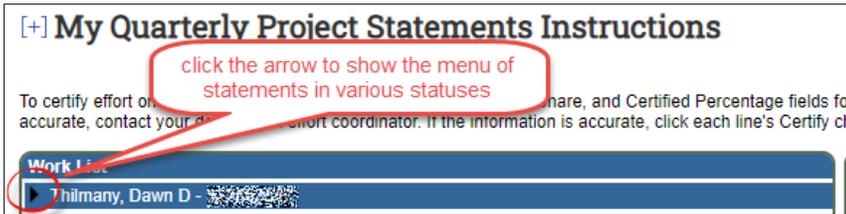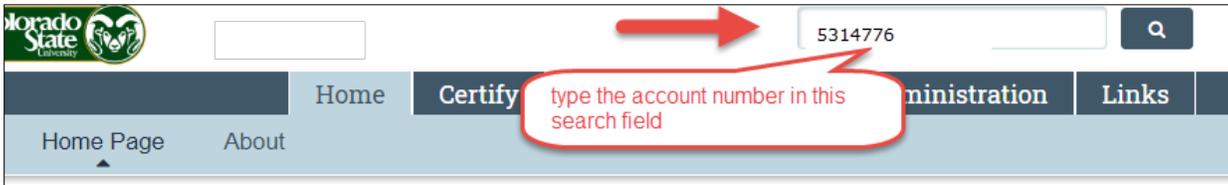

In this example, "Building" is the only section with statements.

If there is a star (⭐) by the section header, there are statements in that status that can be viewed.

Use the ▶ arrow to expand a section.

Option 2: Enter account number in "Enter Search Criteria" box

➢ This will return a page listing all the statements for the selected account.

Account Summary

Account Name:	Rural Employment Sustainability and Establishment...	Associated Department(s):	Agricultural + Resource Economics
Account Nickname:	Rural Employment Sustainability and Establishment...	Award Name:	Rural Employment Sustainability and Establishme...
Account Number:	5314776	Start to End Date:	09/28/2016 to 09/30/2019
Account Type:	Federal	Account PI:	Dawn D Thilmany - 822663542 (Primary Effort Coordinator: Linda M Moller - 822953699)
Account Manager:	Linda M Moller - 822953699 (PEC)		

show more >>

Project Statements	Covered Individuals	Manage Account Designee

Associated Project Statements

Period	Project Certification Status
Q1 - FY19	⭐ Certified
Q4 - FY18	⭐ Certified
Q3 - FY18	⭐ Certified
Q2 - FY18	⭐ Certified

Option 3: Manage tab > Look-up
  ➢ This option is used to find an account and its related project statements.

Enter the account number in the search criteria field, then look for the results in Active or Inactive Award/Account boxes:

NOTE: The search will return results for the specified criteria even if the logged in user cannot open/view the related project statements.