Office of Research and Economic Development

ecrt Effort Coordinator Training

June 2015

AGENDA

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General Upgrade Information:

The ecrt system is being upgraded from version 3.0.3 to the newest version, 5.1

Changes & Improvements for Effort Coordinators:
- New Layout
- Resolved Bugs
- Increased Functionality
- Improved Performance
- Streamlined Process
- Improved Reporting
- Less Administrative Burden

Effort Reporting:

- Effort reporting provides verification to the sponsor that effort committed on a sponsored project has been performed as promised

- Effort is the proportion of time spent on an institutional activity expressed as a percentage

- Effort reports must account for all effort for which the University compensates an individual. This includes all effort expended on sponsored projects, administration, business development, instruction and non-sponsored scholarly activity, clinical activity, and other activity as prescribed in federal circular 2 CFR § 200, Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards (Uniform Guidance); NIH Salary Limitation on Grants; and other policies that govern the need to provide certification of an individual's effort pursuant to his/her sponsored and non-sponsored activities. It does not include effort for which the employee receives compensation directly from another entity (e.g., outside consulting work) or incidental work for which supplemental compensation (i.e., extra state/overload compensation) is paid.

Effort Reporting at FIU:

- Any individual who has committed effort on a sponsored project must be certified

- Effort is certified 3 times per year (spring, summer, fall).

- The one-week pre-review period begins 3 weeks after the period of performance has ended

- The 30-day certification period begins after the pre-review period has ended

- All effort reports must be certified by the corresponding Certifier(s) by the certification deadline

- Any processing tasks must be completed by the Primary Effort Coordinator

Effort Coordinator Responsibilities:

- facilitating the effort reporting process for their assigned department(s)

- understanding the payroll, budgeting, and grants management for their department

- monitoring effort cards as they build to ensure accuracy. Reviewing your department's statements and/or reports, such as the payroll report, will help in identifying errors as soon as possible

- completing any Effort Processing Tasks for their assigned department and resolving any Payroll Transfer Notifications created as a result of certified effort

Accessing the ecrt system:

- The ecrt system log-in screen can be accessed directly by using the link provided: https://ecrt.fiu.edu/ecrt/

- You can also access the system log-in screen from the FIU Effort Reporting webpage http://research.fiu.edu/effort and clicking on the 'Log into ecrt' button.

Logging into the ecrt system:

- ecrt username = FIU PantherID

- ecrt password = FIU MyAccounts password

Tour of the ecrt Homepage:
- Dropdown Menu Bar
- Helpful Links
- Effort Coordinator Worklist: SAC, Effort Processing Tasks, Associated Certifiers
- Search Box & Look-up Feature

Tour of the Department Dashboard:
- People Tab
- Award and Project/Activity ID Tab
- Department Information Tab

Tour of the Effort Card:
- Basic Card Information – Statement Owner, Period of Performance, Due Date, Status
- Column Descriptions
- Sponsored Project ID's / Non-Sponsored ID's
- Reports available from Effort Cards
- Notes & Attachments
- Placing an Effort Card on Hold

Effort Processing Tasks:

- Effort processing tasks are listed on the primary effort coordinator's worklist located on the ecrt homepage (Worklist>Effort Tasks)

- Effort processing tasks are created when the variance between computed effort and certified effort is +/-1% or more on any line

- Options:
    - Cancel - to cancel your review
    - Process - if certified accurately
    - Do Not Process - if certified inaccurately (will return card to the certifier for re-certification and open an email to notify the certifier)

- Add notes and/or attachments directly on the effort card to document any special circumstances, or for any reason

- Clear communication between Effort Coordinators and Certifiers is essential for accurate effort reporting

- Payroll Transfer Notifications are triggered when an effort card is certified and processed with a variance between computed effort (payroll + cost share) and certified effort on any sponsored line is +/-5% or more

Payroll Transfer Notifications:

- Payroll Transfer Notifications are triggered when an effort card is certified and processed with a variance between computed effort (payroll + cost share) and certified effort on any sponsored line is +/-5% or more

- PTN's can be found in the Manage section on the ecrt drop-down menu (Manage>Manage Effort Tasks).

- PTN's can be resolved by completing the items on the resolution checklist .
    1-Review effort card for payroll transfer.
    2-Process payroll transfer in panthersoft if
       necessary.

Reports:

- Reports are located in the reports section on the ecrt menu bar

- Reports are now categorized into different sections:
    - -Commitments
    - -Management
    - -Payroll/Cost Share

- Each report provides an explanation on how to run the report and the information it provides

Please contact ecrt@fiu.edu if you have any questions or for any effort reporting related matters.

Thank you,
FIU Research