

OUHSC Primary Effort Coordinator and Grant Manager Guide

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Grant Manager (GM) – Person assigned to manage a specific project or projects. The project(s) will appear on the Assigned Subactivities tab on the Home Page. The Grant Manager is able to Pre Review this project.

Primary Effort Coordinator (PEC) – Person assigned to manage a specific department and all projects associated to that department. By default, the PEC is the grant manager for all projects. The PEC is able to Pre Review all projects associated to the department.

The Primary Effort Coordinator should be aware of all grant managers in their department. The grant manager should perform all actions on their assigned projects even though the PEC has the ability to perform the same actions.

Logging into ecrt

User Login: Users will input their OUHSC credentials to login to ecrt.

Welcome to ECRT

The University of Oklahoma Health Sciences Center has deployed the web-based ECRT system to serve as the new tool to facilitate the institution's effort reporting and certification process. The institution's previous process, which included a cumbersome paper process, will no longer be used. Individuals that are required to review and certify their sponsored effort can take comfort knowing that this new technology dramatically simplifies the process.

ECRT is a web-based technology that intuitively guides certifiers and administrators through the various aspects of the effort reporting and certification process on a quarterly basis. The ECRT system uses a guided process to walk you through the steps that you will need to complete effort certification.

The ECRT system is designed to help faculty comply with the provisions of this institution's effort reporting policies, federal policy 2 CFR 200.438, DHHS salary limitation on grants and other relevant agency policies that govern the need to provide certification of an individual's effort pursuant to his/her sponsored programs. Faculty with sponsored programs are required to complete and submit an Effort Certification Statement in accordance with the deadlines established with the University's Time and Effort policy.

So, log in and get started. You will be certified before you know it!

Username:
Password:

Home Page: Users will be routed to their Home Page after logging in.

Statements Awaiting Certification Tab – Under the Quarterly Time and Effort Certifications header, all project statements that need to be certified will appear.

Work List for Becky Wood

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) **Associated Certifiers (0)** **Assigned Subactivities**

Effort Statements

Quarterly Personnel Certifications Collaborators Quarterly Personnel

Statement Owner	Department	Period	Due Date	Type	Status	PI
There are no Effort statements associated to you.						

Quarterly Time and Effort Certifications

Top of Page Collaborators Quarterly Personnel

Project Title	Project Number	Sponsor	Period	Due Date	Status	Staff
There are no Project statements associated with you						

Associated Sub-Project Certifications (View Only)

Top of Page Quarterly Personnel Certifications

Project Title	Project Number	Sponsor	Period	Due Date	Status	Staff
There are no Project statements associated with you						

The **Assigned Subactivities** tab displays all project statements associated to the department(s) that the PEC is assigned. This list is sortable by PI, Project Title, Account Number and Period.

Work List for Becky Wood

Welcome to the eert 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) Associated Certifiers (0) **Assigned Subactivities (71)**

Principal Investigator	Project Title	Subactivity Name	Account Number	Sponsor Name	Period	Status	Staff
Chan, Chi Bun	COBRE Project 2 - Chi Bun Chan Ye...	C1050609	C1050609	National Center for Research R...	Q1 2017	In Progress	
Chan, Chi Bun	COBRE Project 2 - Chi Bun Chan Ye...	C1050609	C1050609	National Center for Research R...	Q4 2016	In Progress	
Chan, Chi Bun	COBRE Project 5 - Chan, Chi Bun	C1064009	C1064009	National Center for Research R...	Q3 2016	In Progress	
Chan, Chi Bun	COBRE Project 5 - Chan, Chi Bun	C1064009	C1064009	National Center for Research R...	Q4 2016	In Progress	

The Grant Manager will see the projects for which they are assigned. No other projects will appear here.

Understanding the Department Dashboard

The department dashboard is for PEC's to review and manage the information related to a department including the employees, accounts, and awards associated to that department.

Note: The GM will not have access to a department dashboard unless assigned to a department as an Effort Coordinator

Under the Manage tab on the navigation bar, select Department Dashboard.

The screenshot shows the navigation bar with tabs: Home, Certify, Manage, Reports, Administration, and Links. The 'Manage' tab is highlighted. Below it, a dropdown menu is open, showing 'Look-up' and 'Department Dashboard' with an arrow pointing to the latter. Below the navigation bar, there is a 'Department Dashboard' section with a search bar labeled 'Search for Department :', a dropdown menu, and a 'Choose' button.

The PEC will only have access to their assigned department(s). Select a department from the drop down menu and select Choose.

The screenshot shows the 'Department Dashboard' section with the search bar 'Search for Department :'. The dropdown menu is open, showing two options: 'Medicine - Endocrinology' and 'Medicine Hematology/Oncology'. The 'Choose' button is visible to the right of the dropdown.

The Department Dashboard appears.

*Note: The **People** tab will not be used for project certification.*

The screenshot shows the 'Department Dashboard for Medicine - Endocrinology - COM215'. It includes a search bar, a 'Choose' button, and a tabbed interface with 'People', 'Project Certifications', 'Award and Account', and 'Department Information'. The 'Project Certifications' tab is active, showing a 'Project Certification Summary Chart' with filters for 'Employee Type' and 'Period'. Below the chart, there is a table with columns: Project Nickname, Project Number, Grant Manager, PI, PI Department, Statements, and Action. The table lists three projects: 'Oklahoma Sprogen's Syndrome Center of Research Translati', 'Mentoring Diabetes Research in Oklahoma (COBRE) Year 9', and 'Mentoring Diabetes Research in Oklahoma (COBRE) Year 10'.

Project Nickname	Project Number	Grant Manager	PI	PI Department	Statements	Action
Oklahoma Sprogen's Syndrome Center of Research Translati	C3077005	Wood, Becky - 506090	Scofield, Robert - 005469	Medicine - Endocrinology	3	View
Mentoring Diabetes Research in Oklahoma (COBRE) Year 9	C1050009	Wood, Becky - 506090	Ma, Jian-Xing - 516329	Physiology	2	View
Mentoring Diabetes Research in Oklahoma (COBRE) Year 10	C1050010	Wood, Becky - 506090	Ma, Jian-Xing - 516329	Physiology	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 specific period, select the employee type in the drop-down and the Period of Performance from the drop-down list.

Department Dashboard for Medicine - Endocrinology - COM215

Search for Department : **Choose**

People | **Project Certifications** | Award and Account | Department Information


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

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

Status	Count	Percentage
Auto Approved	24	
In Progress	23	100.0%



Note: Search for employee type OUHSC

The chart shows only those statuses that apply to statements for that period.

 **Send emails** to 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.

Project Certification Summary Chart: Employee Type: OUHSC | Period: 1/1/2016 to 3/31/2016

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





Status	Count	Percentage
Auto Approved 	24	
In Progress 	23	100.0%

The subject and body of the email are configurable. After composing the email, click Send the Email. The email will route to all PIs, designee's and grant managers with a statement in the status selected from the Project Certification Summary Chart.



Subject:





Destination: ☒ Statement Owners ☐ All ECs ☐ Only PIs


Message:








B *I* S *I_x*



Styles









































Format

Send the Email

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

Project Statements <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
Oklahoma Sjogren's Syndrome Center of Research Translati	C3077005	Wood, Becky - 506090	Scafield, Robert - 006469	Medicine - Endocrinology	 	 
Mentoring Diabetes Research in Oklahoma (COBRE) Year 9	C1050009	Wood, Becky - 506090	Ma, Jian-Xing - 516329	Physiology	 	 
Mentoring Diabetes Research in Oklahoma (COBRE) Year 10	C1050010	Wood, Becky - 506090	Ma, Jian-Xing - 516329	Physiology	 	 
COBRE Core II - Diabetic Animal Year 9	C1050109	Wood, Becky - 506090	Ma, Jian-Xing - 516329	Physiology	 	 

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
Oklahoma Sjogren's Syndrome Center of Research Translati	C3077005	Wood, Becky - 506090	Scafield, Robert - 006469	Medicine - Endocrinology	 	 
Mentoring Diabetes Research in Oklahoma (COBRE) Year 9	C1050009	Wood, Becky - 506090	Ma, Jian-Xing - 516329	Physiology	 	 
Mentoring Diabetes Research in Oklahoma (COBRE) Year 10	C1050010	Wood, Becky - 506090	Ma, Jian-Xing - 516329	Physiology	 	 
COBRE Core II - Diabetic Animal Year 9	C1050109	Wood, Becky - 506090	Ma, Jian-Xing - 516329	Physiology	 	 
COBRE Core II - Diabetic Animal Year 10	C1050110	Wood, Becky - 506090	Ma, Jian-Xing - 516329	Physiology	 	 
COBRE Core III - Histology Year 9	C1050209	Wood, Becky - 506090	Ma, Jian-Xing - 516329	Physiology	 	 
COBRE Core III - Histology Year 10	C1050210	Wood, Becky - 506090	Ma, Jian-Xing - 516329	Physiology	 	 
COBRE Human Sample Repository Year 9	C1050309	Wood, Becky - 506090	Lane, James - 52851	Physiology	 	 
COBRE Core IV - Biostatistics Core Year 10	C1050310	Wood, Becky - 506090	Lane, James - 52851	Physiology	 	 
COBRE Project 2 - Chi Bun Chan Year 9	C1050609	Wood, Becky - 506090	Chan, Chi Bun - 532891	Physiology	 	 

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

People Project Certifications Award and Account Department Information						
Filters						
Award Number	Account Number	Name	Sponsor	PI	Start Date	End Date
20111471	C1070503	Year 3	10002913	Jian Xu	07/01/2013	06/30/2014
20120084	C5064603	Year 3	10000094	Jian Xu	01/01/2014	12/31/2014
20131665	C3101402	Year 2 - Antibody Mediated Spontaneous Abortion in Lupus	10003066	Robert Scofield	09/01/2015	08/31/2016
20141152	C5077202	Year 2 - Role of Endothelial Autophagy in Diabetes	10000165	Jian Xu	07/01/2015	06/30/2016
20151925	C1087422	Year 2 - Mechanism and Treatment of Atrophic AMD	10002913	Yun Le	08/01/2016	07/31/2017
20161254	C3109402	Year 2 - Derivation of Pancreatic Beta Cells from Human	10003066	Weidong Wang	03/01/2016	02/28/2017
20120084	C5064602	Year 2	10000094	Jian Xu	01/01/2013	12/31/2013



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

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

Project Statements

In Progress

Select filter type:
☐ Nickname
☒ Number
☐ PI
☐ Grant Manager

Project Statements

Project Nickname
Grant Manager

Oklahoma Sjogren's Syndrome Center of Research Translati C3077005 Wood, Becky - 506090

Mentoring Diabetes Research in Oklahoma (COBRE) Year 9 C1050009 Wood, Becky - 506090

The page will display the results from the information entered into the filter field.

Project Statements						
C3077005 (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
Oklahoma Sjogren's Syndrome Center of Research Translati	C3077005	Wood, Becky - 506090	Scofield, Robert - 006469	Medicine - Endocrinology		








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

People	Project Certifications	Award and Account	Department Information
Department Basic Information:			
Name: Medicine - Endocrinology		Type: COM215	
Description: Active: Yes			
Department Effort Coordinator(s)			
Name	Address	Phone	Email
Wood, Becky - 505090			becky-wood@ouhsc.edu
Viewer(s)			
Name	Address	Phone	Email
None found			
Reviewer(s)			
Name	Address	Phone	Email
None found			
Department Relationships			
<ul style="list-style-type: none"> Deans Office - COM (N/A) Medicine - Endocrinology (Wood Becky - 505090) Academic Programs (N/A) Alcohol Center (N/A) Anesthesiology (N/A) Biochemistry & Molec. Biology (Grady Derrick - 517506) Breast Health Institute (N/A) Cancer Center Basic Research (VanKagoner Aimee - 515407) Cancer Center Research Admin (N/A) Cell Biology (Slaughter Paula - 508189) Cntr for Learning & Leadership (N/A) Cntr for Rrch in Womens Heart (N/A) Cohen OC-ASCR grant (N/A) 			

Note: The Primary Effort Coordinator is highlighted in yellow and cannot be edited

Statement Statuses

The project statement will update to different statuses throughout the certification period.

 In Progress	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.
 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.
 Pre Reviewed	This status indicates that a Project Statement has been pre reviewed by a department or central administrator.
 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.
 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.
 Certified	This status indicates that an individual certified his/her Project Statement.
 Certified, Payroll 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 task and the project statement remains in this status until an administrator completes the PAR task.
 Ready for Recertification	This is the status of a Project Statement that has been re-opened by an administrator. The PI will be able to certify his/her project statement again.

Navigating to the Project Statement

There are multiple ways to navigate to a project statement.

The **Look-up Page** is located under the Manage tab on the navigation bar. The PEC can use this page to search for departments and projects associated to them.

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

The screenshot shows the top navigation bar with tabs: Home, Certify, Manage, Reports, Administration, and Links. The 'Manage' tab is highlighted. Below the navigation bar, the 'Look-up Page' is displayed. It includes a sub-header 'Look-up' with an arrow pointing to 'Department Dashboard'. The main text explains that the Look-Up page allows searching for Employee, Award(s), Account(s), or Department(s) and that at least three characters must be entered. It also notes that Enter and Tab keys do not allow selection of data. Below this is a search input field labeled 'Enter Search Criteria'. At the bottom, there are two red boxes labeled 'Employee:' and 'Department:' for additional search criteria.

This screenshot shows the 'Look-up Page' with the search input field containing 'C1077401'. Below the input field, there are four search result boxes: 'Employee', 'Department', 'Active Award / Account', and 'Inactive Award / Account'. The 'Active Award / Account' box shows a result: 'C1077401 - Balloon Model of Pertussis Disease and Vaccine Efficacy'. The other three boxes show 'No search results found'.

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

A new browser tab will open, displaying the **Award/Account Summary Page** for that project. 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:	Baboon Model of Pertussis Disease and Vaccine Evaluation	Exception Account:	<input type="checkbox"/>
Account Nickname:	Baboon Model of Pertussis Disease and Vaccine Evaluation	Cost Sharing Requirement:	<input type="checkbox"/>
Account Number:	C1077401	Start to End Date:	08/13/2012 to 08/12/2017
Award Name:	Baboon Model of Pertussis Disease and Vaccine Evaluation	Account Type:	D
Account PI:	James Papin - 506813 (Primary Effort Coordinator: Deborah Bellgardt - 505802)	Account Manager:	Deborah Bellgardt - 505802 (PEC) show more >>

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

Account Summary			
Account Name:	Baboon Model of Pertussis Disease and Vaccine Evaluation	Exception Account:	<input type="checkbox"/>
Account Nickname:	Baboon Model of Pertussis Disease and Vaccine Evaluation	Cost Sharing Requirement:	<input type="checkbox"/>
Account Number:	C1077401	Start to End Date:	08/13/2012 to 08/12/2017
Award Name:	Baboon Model of Pertussis Disease and Vaccine Evaluation	Account Type:	D
Account PI:	James Papin - 506813 (Primary Effort Coordinator: Deborah Bellgardt - 505802)	Account Manager:	Deborah Bellgardt - 505802 (PEC)
Account Sponsor Name:	Food and Drug Administration (Other / Default Type)	Program:	00012
Account Sponsor Number:	10001479	Award Number:	20122749
Account Amount:	\$1,367,280.69	NSF Account Cap:	
NIH Account Salary Cap:		Reportable Status:	<input checked="" type="checkbox"/>
NIH Account Salary Cap Override:		K-Award:	<input type="checkbox"/>
Project Number:	C1077401	Associated Department(s):	ORA019 - Comparative Medicine
			<< show less

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

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

Associated Project Statements	
3 items found, displaying all items.	
Period	Project Certification Status
Q1 2017	In Progress
Q4 2016	In Progress
Q3 2016	In Progress

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

Quarterly Time and Effort Certifications Instructions

Work List

Papin, James - 506813

Ready for Certification

Pre Reviewed

Ready for Pre Review

In Progress ★

C1077401 Baboon Model of Pertussis Disease and Vaccin... Q3 2016

C1077401 Baboon Model of Pertussis Disease and Vaccin... Q4 2016

C1077401 - Baboon Model of Pertussis Disease and Vaccine Evaluation

Project Information

Org: ORA019 - ORA019 - Comparative Medicine

Project Title: Baboon Model of Pertussis Disease and Vaccine Evaluation

Program: 00012

Award Number: 20122749

SubActivity Funding Dates: 08/13/2012 to 08/12/2017

Project Statement for C1077401: Baboon Model of Pertussis Disease and Vaccine Evaluation (Q1 2017), effort from 7/1/2015 to 9/30/2016, due date 10/31/2016, Status: In Progress

Employee	C.S. Fund	Committed Effort	Payroll Dollars	Payroll Effort	Cost Share Dollars	Cost Share Effort	Total Payroll \$	Certified Effort	Certify?	Action
Kosanke, Stanley - 004409		0%	\$367.92	1%	\$0.00	0%	\$367.92	1%	<input type="checkbox"/>	
Papin, James - 506813		20%	\$4,482.00	28%	\$0.00	0%	\$4,482.00	28%	<input type="checkbox"/>	
Preno, Alisha - 532099		0%	\$1,469.22	26%	\$0.00	0%	\$1,469.22	26%	<input type="checkbox"/>	
Reuter, Darlene - 526107		0%	\$1,813.35	33%	\$0.00	0%	\$1,813.35	33%	<input type="checkbox"/>	

Get Help

Notes

Attachments

Transactions ★

Activity Log ★

Email Log

Home

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

Department Dashboard for ORA019 - Comparative Medicine - ORA019

Search for Department: ORA019 - Comparative Medicine

People **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	OUHSC
Auto Approved	2
In Progress	11 100.0%

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
Baboon Model of Pertussis Disease and Vaccine Evaluation	C1077401	Bellgardt, Deborah - 505802	Papin, James - 506813	ORA019 - Comparative Medicine		
OUHSC Specific Pathogen Free Baboon Research	C3086203	Bellgardt, Deborah - 505802	Wolf, Roman - 008009	ORA019 - Comparative Medicine		
OUHSC Specific Pathogen Free Baboon Research	C3086204	Bellgardt, Deborah - 505802	Wolf, Roman - 008009	ORA019 - Comparative Medicine		
Baboon Research Resource Program	C1162118	Bellgardt, Deborah - 505802	White, Gary - 004811	ORA019 - Comparative Medicine		
Baboon Research Resource Program	C1162119	Bellgardt, Deborah - 505802	White, Gary - 004811	ORA019 - Comparative Medicine		

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

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

The project statement generates in a new tab.

Quarterly Time and Effort Certifications Instructions

Work List

Papin, James - 506813

Ready for Certification

Pre Reviewed

Ready for Pre Review

In Progress

C1077401 Baboon Model of Pertussis Disease and Vaccin... Q3 2016

C1077401 Baboon Model of Pertussis Disease and Vaccin... Q4 2016

C1077401 - Baboon Model of Pertussis Disease and Vaccine Evaluation

Project Information

Org: ORA019 - Comparative Medicine

Project Title: Baboon Model of Pertussis Disease and Vaccine Evaluation

Program: 00012

Award Number: 20122749

SubActivity Funding Dates: 08/13/2012 to 08/12/2017

Project Statement for C1077401: Baboon Model of Pertussis Disease and Vaccine Evaluation (Q1 2017): effort from 7/1/2016 to 9/30/2016, due date 10/31/2016. Status: In Progress

Employee	CS Fund	Committed Effort	Payroll Dollars	Payroll Effort	Cost Share Dollars	Cost Share Effort	Total Payroll \$	Certified Effort	Certify?	Action
Kosanke, Stanley - 004409		0%	\$367.92	1%	\$0.00	0%	\$367.92	1%	<input type="checkbox"/>	
Papin, James - 506813		20%	\$4,482.00	28%	\$0.00	0%	\$4,482.00	28%	<input type="checkbox"/>	
Premo, Alisha - 532099		0%	\$1,469.22	26%	\$0.00	0%	\$1,469.22	26%	<input type="checkbox"/>	
Reuter, Darlene - 526107		0%	\$1,813.35	33%	\$0.00	0%	\$1,813.35	33%	<input type="checkbox"/>	

Get Help

Notes

Attachments

Transactions

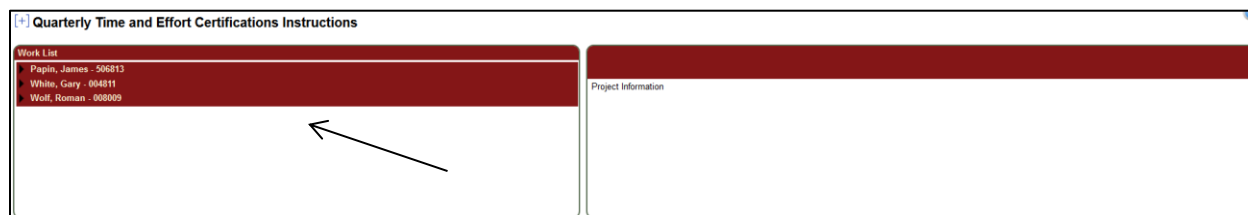
Activity Log

Email Log

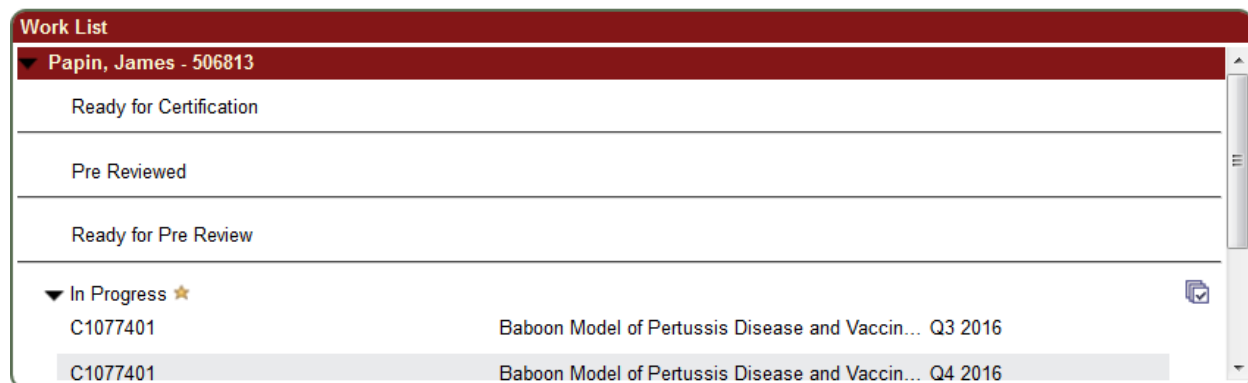
From the navigation menu, select **Certify**, and then click **My Project Statements**.



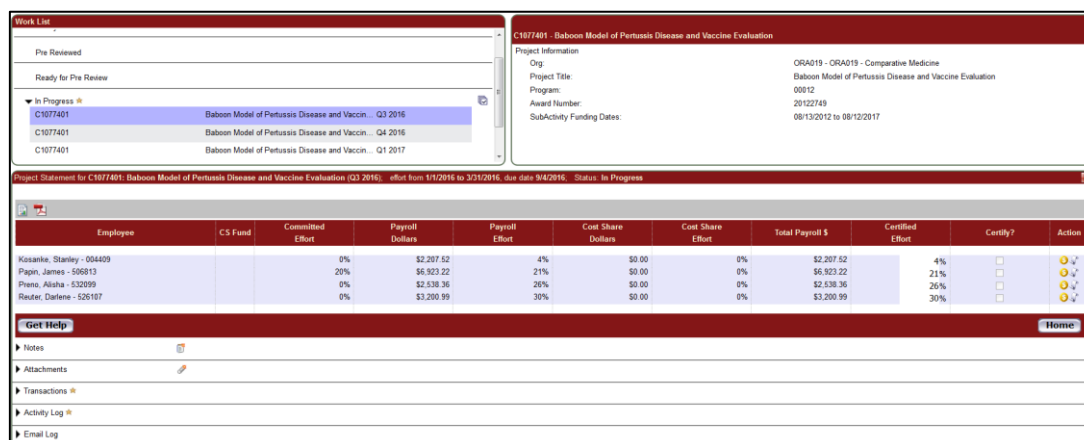
The project PI's are listed in the Work List. Only the projects associated to the PEC's department will be listed.



Use the > arrow key to expand and view the PI's project statements. The project statements will be grouped by status. Use the > arrow next to each status to view all of the PI's project statements that are in that status.



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





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

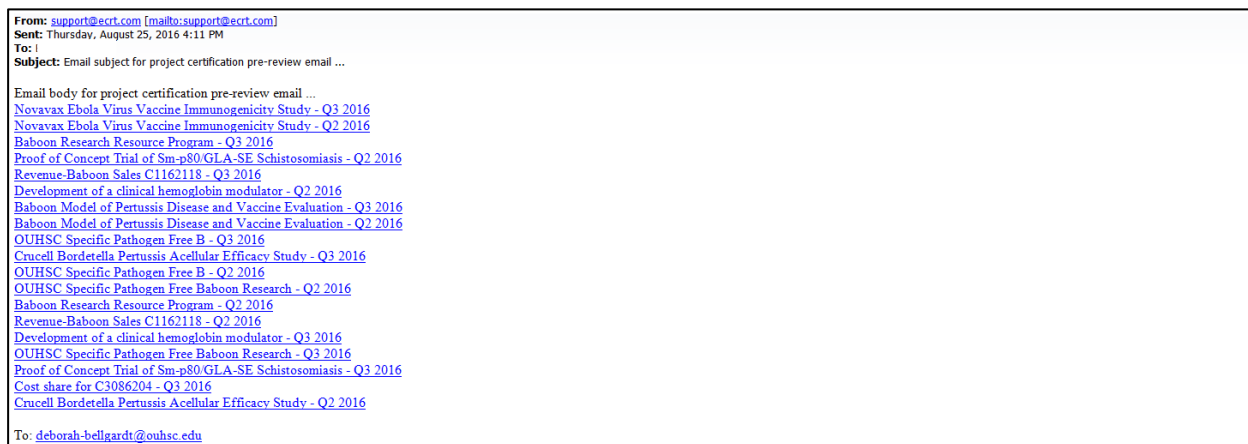
Work List		
▼ Papin, James - 506813		
▼ Ready for Certification ★		
C1077401	Baboon Model of Pertussis Disease and Vaccin...	Q4 2016
C1077401	Baboon Model of Pertussis Disease and Vaccin...	Q1 2017
Pre Reviewed		
Ready for Pre Review		

Pre Reviewing a Project Statement

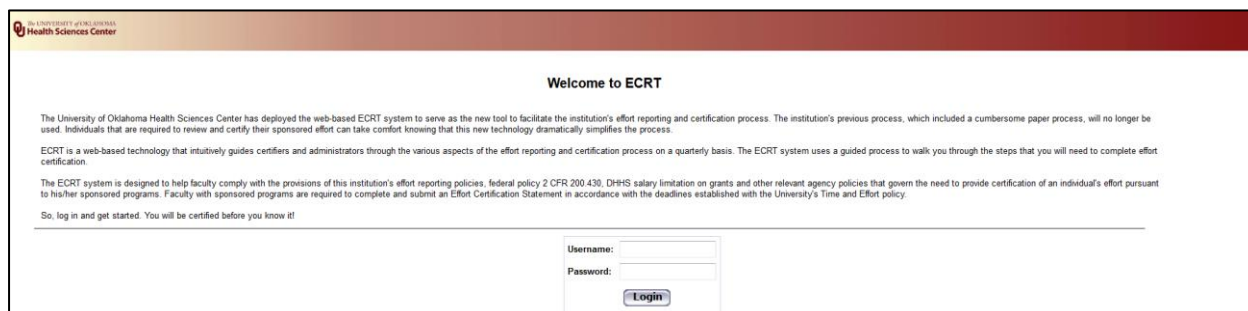
The PEC and/or the GM will receive a system generated email notifying them that project statements are now in the status **'Ready for Pre Review'**.

Note: The Primary Effort Coordinator should be aware of all grant managers in their department. The grant manager should perform all actions on their assigned projects even though the PEC has ability to perform the same actions.

The PEC/GM will have 15 days to Pre Review all project statements.



Click the hyperlink next to the project name. The ecrt login page appears. Login using your OUHSC credentials.



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

Work List for Deborah Bellgardt

Welcome to the eert 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		Associated Certifiers (0)		Assigned Subactivities (30)			
Principal Investigator	Project Title	Subactivity Name	Account Number	Sponsor Name	Period	Status	Staff
White, Gary	Baboon Research Resource Program	C1162118	C1162118	National Center for Research R...	Q1 2017	Ready for Pre Review	
White, Gary	Baboon Research Resource Program	C1162119	C1162119	National Center for Research R...	Q1 2017	Ready for Pre Review	
White, Gary	Baboon Research Resource Program	C1162118	C1162118	National Center for Research R...	Q3 2016	Ready for Pre Review	
White, Gary	Baboon Research Resource Program	C1162118	C1162118	National Center for Research R...	Q4 2016	Ready for Pre Review	
White, Gary	Baboon Research Resource Program	C1162119	C1162119	National Center for Research R...	Q4 2016	Ready for Pre Review	
White, Gary	Revenue-Baboon Sales C1162118	C9038008	C9038008	National Center for Research R...	Q1 2017	Ready for Pre Review	
White, Gary	Revenue-Baboon Sales C1162118	C9038008	C9038008	National Center for Research R...	Q3 2016	Ready for Pre Review	
White, Gary	Revenue-Baboon Sales C1162118	C9038008	C9038008	National Center for Research R...	Q4 2016	Ready for Pre Review	
White, Gary	Revenue-Baboon Sales C1162119	C9038009	C9038009	National Center for Research R...	Q1 2017	Ready for Pre Review	
White, Gary	Revenue-Baboon Sales C1162119	C9038009	C9038009	National Center for Research R...	Q4 2016	Ready for Pre Review	
Wolf, Roman	Cost share for C3086204	C9086204	C9086204	National Institutes of Health	Q1 2017	Ready for Pre Review	
Wolf, Roman	Cost share for C3086204	C9086204	C9086204	National Institutes of Health	Q3 2016	Ready for Pre Review	

Click one of the hyperlinks next to navigate to the project statement.

The project statement appears. Notice the project is highlighted under the Work List in the left pane of the project statement. Project information including the project department, project title, program number, award number and funding start and end dates appear in the right pane of the project statement.

Work List

Pre Reviewed

Ready for Pre Review

C3086203 OUHSC Specific Pathogen Free Baboon ResearchQ3 2016

C3086204 OUHSC Specific Pathogen Free Baboon ResearchQ3 2016

C3086204 OUHSC Specific Pathogen Free Baboon ResearchQ4 2016

C3086204 OUHSC Specific Pathogen Free Baboon ResearchQ1 2017

C3100702 Development of a clinical hemoglobin modulator Q3 2016

C3100702 - Development of a clinical hemoglobin modulator

Project Information

Org: ORA019 - ORA019 - Comparative Medicine

Project Title: Development of a clinical hemoglobin modulator

Program: 00012

Award Number: 20140986

SubActivity Funding Dates: 05/01/2015 to 04/30/2017

Project Statement for C3100702: Development of a clinical hemoglobin modulator (Q3 2016): effort from 1/1/2016 to 3/31/2016, due date 9/4/2016, Status: Ready for Pre Review

Employee	C/S Fund	Committed Effort	Payroll Dollars	Payroll Effort	Cost Share Dollars	Cost Share Effort	Total Payroll \$	Certified Effort	Certify?	Action
Carey, David - 005089		0%	\$1,237.56	10%	\$0.00	0%	\$1,237.56	10%	<input type="checkbox"/>	
Preno, Alisha - 532099		0%	\$872.28	9%	\$0.00	0%	\$872.28	9%	<input type="checkbox"/>	
Reuter, Darlene - 526107		0%	\$1,960.44	18%	\$0.00	0%	\$1,960.44	18%	<input type="checkbox"/>	
Wolf, Roman - 008009		10%	\$2,074.14	4%	\$0.00	0%	\$2,074.14	4%	<input type="checkbox"/>	
Wolf, Roman - 008009	STATE...	10%	\$0.00	0%	\$729.48	1%	\$729.48	1%	<input type="checkbox"/>	

Get Help

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Pre Review **Home**

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

Project Statement for C3100702: Development of a clinical hemoglobin modulator (Q3 2016) effort from 1/1/2016 to 3/31/2016, due date 9/4/2016. Status: Ready for Pre Review

Employee	C.S Fund	Committed Effort	Payroll Dollars	Payroll Effort	Cost Share Dollars	Cost Share Effort	Total Payroll \$	Certified Effort	Certify?	Action
Carey, David - 005089		0%	\$1,237.56	10%	\$0.00	0%	\$1,237.56	10%	<input type="checkbox"/>	
Preno, Alisha - 532099		0%	\$872.28	9%	\$0.00	0%	\$872.28	9%	<input type="checkbox"/>	
Reuter, Darlene - 526107		0%	\$1,960.44	18%	\$0.00	0%	\$1,960.44	18%	<input type="checkbox"/>	
Wolf, Roman - 008009		10%	\$2,074.14	4%	\$0.00	0%	\$2,074.14	4%	<input type="checkbox"/>	
Wolf, Roman - 008009	STATE...	10%	\$0.00	0%	\$729.48	1%	\$729.48	1%	<input type="checkbox"/>	

Get Help Pre Review Home

The columns displayed on the project statement include:

- ✓ The **CS Fund** column shows the cost share fund code that the corresponding employee was paid from. Hover over the name in this column to display the full account number.
- ✓ The **Committed Effort** column shows the committed effort for the individual for the project statement period.
- ✓ The **Payroll Dollars** column lists the dollar amount the employee was paid from the project during the period. The **Payroll Effort** column is the percentage of the payroll dollars based on the person's total pay for the period.
- ✓ The **Cost Share Dollars** column lists the dollar amount the employee was paid from on the Cost Share fund code for the project. The **Cost Share Effort** column is the percentage of the cost share dollars based on the person's total pay for the period.
- ✓ The **Total Payroll \$** column = payroll dollars + cost share dollars
- ✓ The **Certified Effort** column = payroll effort + cost share effort
- ✓ The **Certify?** column shows blank checkboxes that the PI will use during certification.
- ✓ The **Action** column includes two payroll reports that the PEC/GM can use to review and validate payroll dollars and percentages for each employee.



Run the payroll report for each employee by clicking the dollar sign icon under the action column. The report will generate in a new window.

ecrt Reporting

Category	Reports	Description
Commitments	Payroll Report	The Payroll Report is a payroll summary report for a specific individual, Department or Account and date range.
Management	SPES (Sponsored Project Employee Summary) Report	The date range for this can be set one of two ways. First, the report can be run by selecting a date range. This allows the user to run a report that crosses reporting periods but is more relevant to the Account activity.
Payroll/Cost Share		The alternate way of setting the range is by selecting 'Employee Type'. This will prompt the user to select the type of employee, which will in turn determine the periods that can be reviewed. By selecting the employee type does not mean you'll only get data for those employees. The employee type select is to better provide a date range for the query.

Parameters Results

[Pay Period View](#)
[Account View](#)

6 items found, displaying all items.

Certifier	Department	Department Number	Grant	Pay Period	Payroll	Pay %	Pay Type	Employee Type	Statement Type
Carey, David - 005089	ORA019 - Comparative Medicine	ORA019	C3100702 - Development of a clinical hemoglobin modulator	12/27/2015 to 01/09/2016	\$206.26	2 %	HR	OUHSC Personnel	Base
				01/10/2016 to 01/23/2016	\$206.26	2 %	HR	OUHSC Personnel	Base
				01/24/2016 to 02/06/2016	\$206.26	2 %	HR	OUHSC Personnel	Base
				02/07/2016 to 02/20/2016	\$206.26	2 %	HR	OUHSC Personnel	Base
				02/21/2016 to 03/05/2016	\$206.26	2 %	HR	OUHSC Personnel	Base
				03/06/2016 to 03/19/2016	\$206.26	2 %	HR	OUHSC Personnel	Base
			Subtotal		\$1,237.56	10 %			
			Certifier Total for Period		\$1,237.56	10 %			
Total Of All Certifiers					\$1,237.56	10 %			

6 items found, displaying all items.

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

The report defaults on a Pay Period View showing the employee's payroll amount broken-down by pay period. The total payroll dollar and payroll percentage column are the amounts shown in the Total Payroll \$ and Certified Effort columns on the project statement.

This report can be exported into excel by clicking the excel hyperlink at the bottom of the page.

Parameters Results

[Pay Period View](#)
[Account View](#)

Click the **Account View** hyperlink to view all payroll for the employee for the period, broken-down by account.

The report displays the name of the employee, the employee's primary department name and number, the account (shown below as Grant), the pay period, the payroll amount, the percentage of the total statement payroll for the account, the pay type, and the employee type.

Career	Department	Department Number	Grant	Pay Period	Payroll	Pay %	Pay Type	Employee Type	Statement Type
Carey, David - 005089	ORAD19 - Comparative Medicine	ORAD19	C3100702 - Development of a clinical hemoglobin modulator	12/27/2015 to 01/09/2016	\$208.28	2%	HR	OUHSC Personnel	Base
				01/10/2016 to 01/23/2016	\$208.28	2%	HR	OUHSC Personnel	Base
				01/24/2016 to 02/06/2016	\$208.28	2%	HR	OUHSC Personnel	Base
				02/07/2016 to 02/20/2016	\$208.28	2%	HR	OUHSC Personnel	Base
				02/21/2016 to 03/05/2016	\$208.28	2%	HR	OUHSC Personnel	Base
				03/06/2016 to 03/19/2016	\$208.28	2%	HR	OUHSC Personnel	Base
				Subtotal	\$1,237.56	10%			
			C5077801 - Proof of Concept Trial of Sm-p80/OLA-SE Schistosomiasis	12/27/2015 to 01/09/2016	\$990.03	8%	HR	OUHSC Personnel	Base
				01/10/2016 to 01/23/2016	\$990.03	8%	HR	OUHSC Personnel	Base
				01/24/2016 to 02/06/2016	\$990.03	8%	HR	OUHSC Personnel	Base
				02/07/2016 to 02/20/2016	\$990.03	8%	HR	OUHSC Personnel	Base
				02/21/2016 to 03/05/2016	\$990.03	8%	HR	OUHSC Personnel	Base
				03/06/2016 to 03/19/2016	\$1,528.34	12%	HR	OUHSC Personnel	Base
				Subtotal	\$6,476.49	53%			
			C9038008 - Revenue-Baboon Sales C1162118	12/27/2015 to 01/09/2016	\$185.01	1%	HR	OUHSC Personnel	Base
				01/10/2016 to 01/23/2016	\$185.01	1%	HR	OUHSC Personnel	Base
				01/24/2016 to 02/06/2016	\$185.01	1%	HR	OUHSC Personnel	Base
				02/07/2016 to 02/20/2016	\$185.01	1%	HR	OUHSC Personnel	Base
				02/21/2016 to 03/05/2016	\$185.01	1%	HR	OUHSC Personnel	Base
				03/06/2016 to 03/19/2016	\$185.01	1%	HR	OUHSC Personnel	Base
				Subtotal	\$990.06	8%			
			C9085204 - Cost share for C3086204	12/27/2015 to 01/09/2016	\$99.01	1%	HR	OUHSC Personnel	Base
				01/10/2016 to 01/23/2016	\$185.01	1%	HR	OUHSC Personnel	Base
				01/24/2016 to 02/06/2016	\$185.01	1%	HR	OUHSC Personnel	Base
				02/07/2016 to 02/20/2016	\$185.01	1%	HR	OUHSC Personnel	Base
				02/21/2016 to 03/05/2016	\$185.01	1%	HR	OUHSC Personnel	Base
				03/06/2016 to 03/19/2016	\$185.01	1%	HR	OUHSC Personnel	Base
				Subtotal	\$990.06	8%			
			SU383100 - SU383100	12/27/2015 to 01/09/2016	\$536.31	4%	HR	OUHSC Personnel	Base
				01/10/2016 to 01/23/2016	\$536.31	4%	HR	OUHSC Personnel	Base
				01/24/2016 to 02/06/2016	\$536.31	4%	HR	OUHSC Personnel	Base
				02/07/2016 to 02/20/2016	\$536.31	4%	HR	OUHSC Personnel	Base
				02/21/2016 to 03/05/2016	\$536.31	4%	HR	OUHSC Personnel	Base
				Subtotal	\$2,681.55	22%			
Total of All Careers					\$12,309.72	100%			

Click the X in the upper right corner to close the report.



View all payroll for an employee for the period by clicking the scroll icon under the action column. A pop up box will appear listing all of the projects the employee was paid from for the period. Each project is listed with the corresponding payroll dollar amount and percentage. The total percentage will equal 100%.

Work List

Pre Reviewed

- Ready for Pre Review
- C3086203 OUHSC Specific Pathogen Free Baboon ResearchQ3 2016
- C3086204 OUHSC Specific Pathogen Free Baboon ResearchQ3 2016
- C3086204 OUHSC Specific Pathogen Free Baboon ResearchQ4 2016
- C3086204 OUHSC Specific Pathogen Free Baboon ResearchQ1 2017
- C3100702 Development of a clinical hemoglobin modulator Q3 2016

C3100702 - Development of a clinical hemoglobin modulator

Project Information

Org:

Project Title:

Program:

Award Number:

SubActivity Funding Dates:

Project Payroll Summary - Q3 2016

Project Name	Total Payroll \$	Effort %
Proof of Concept Trial of Sm-p...	\$6,476.49	53%
Revenue-Baboon Sales C1162...	\$990.06	8%
Development of a clinical hem...	\$1,237.56	10%
Cost share for C3086204	\$924.06	8%
SU383100	\$2,681.55	22%
Total:	\$12,309.72	100.00%

Project Statement for C3100702 - Development of a clinical hemoglobin modulator (Q3 2016) - effort from 1/1/2016 to 3/31/2016, due date 9/4/2016, Status: Ready for Pre Review

Employee	CS Fund	Committed Effort	Payroll Dollars	Payroll Effort	Cost Share Dollars	Cost Share Effort
Carey, David - 005089		0%	\$1,237.56	10%	\$0.00	0%
Pieno, Alisha - 532099		0%	\$872.28	9%	\$0.00	0%
Reuter, Darlene - 526107		0%	\$1,960.44	18%	\$0.00	0%
Wolf, Roman - 008009		10%	\$2,074.14	4%	\$0.00	0%
Wolf, Roman - 008009	STATE...	10%	\$0.00	0%	\$729.48	1%



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

Project Statement for C3100702: Development of a clinical hemoglobin modulator (Q3 2016): effort from 1/1/2016 to 3/31/2016, due date 9/4/2016: Status: Ready for Pre Review

Employee	CS Fund	Committed Effort	Payroll Dollars	Payroll Effort	Cost Share Dollars	Cost Share Effort	Total Payroll \$	Certified Effort	Certify?	Action
Carey, David - 005089		0%	\$1,237.56	10%	\$0.00	0%	\$1,237.56	10%	<input type="checkbox"/>	
Preno, Alisha - 532099		0%	\$872.28	9%	\$0.00	0%	\$872.28	9%	<input type="checkbox"/>	
Reuter, Darlene - 526107		0%	\$1,960.44	18%	\$0.00	0%	\$1,960.44	18%	<input type="checkbox"/>	
Wolf, Roman - 008009		10%	\$2,074.14	4%	\$0.00	0%	\$2,074.14	4%	<input type="checkbox"/>	
Wolf, Roman - 008009	STATE...	10%	\$0.00	0%	\$729.48	1%	\$729.48	1%	<input type="checkbox"/>	

Get Help Pre Review Home

Notes Attachments Transactions Activity Log Email Log

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.

Employee Committed Payroll close

Carey, David - 005089
Preno, Alisha - 532099
Reuter, Darlene - 526107
Wolf, Roman - 008009
Wolf, Roman - 008009

Get Help

Notes

Create New Note

Note (max 4000 characters. Extra text will be truncated):

Save Note

Note that these comments appear on the statement at all times so anyone that can review the statement will see the comments.

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

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

Get Help

Notes

Date	User	Note	Action
09/05/2016	Deborah Bellgardt - 505802	TEST	

Attachments

The date the note was added, the name and username of the person that added the note, and the note summary are visible.



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

Project Statement for C3100702: Development of a clinical hemoglobin modulator (Q3 2016): effort from 1/1/2016 to 3/31/2016, due date 9/4/2016, Status: Ready for Pre Review

Employee	CS Fund	Committed Effort	Payroll Dollars	Payroll Effort	Cost Share Dollars	Cost Share Effort	Total Payroll \$	Certified Effort	Certify?	Action
Carey, David - 005089		0%	\$1,237.56	10%	\$0.00	0%	\$1,237.56	10%	<input type="checkbox"/>	
Preno, Alisha - 532099		0%	\$872.28	9%	\$0.00	0%	\$872.28	9%	<input type="checkbox"/>	
Rauter, Darlene - 526107		0%	\$1,960.44	18%	\$0.00	0%	\$1,960.44	18%	<input type="checkbox"/>	
Wolf, Roman - 008009		10%	\$2,074.14	4%	\$0.00	0%	\$2,074.14	4%	<input type="checkbox"/>	
Wolf, Roman - 008009	STATE...	10%	\$0.00	0%	\$729.48	1%	\$729.48	1%	<input type="checkbox"/>	

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Upload Project Attachment close

Attach File

Select File to Attach:

No file selected.

Select the paper clip icon and a new pop-up window appears, allowing the PEC/GM to attach a file to the project statement.

Upload Project Attachment close

Attach File

Select File to Attach:

ecr.PNG

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

Upload Project Attachment close

Attach File

File Successfully Uploaded

Select File to Attach:

No file selected.

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
ecr.png	09/05/2016	

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

Project Statement for C3100702: Development of a clinical hemoglobin modulator (Q3 2016) - effort from 1/1/2016 to 3/31/2016, due date 9/4/2016 - Status: Ready for Pre Review

Employee	CS Fund	Committed Effort	Payroll Dollars	Payroll Effort	Cost Share Dollars	Cost Share Effort	Total Payroll \$	Certified Effort	Certify?	Action
Carey, David - 005089		0%	\$1,237.56	10%	\$0.00	0%	\$1,237.56	10%	<input type="checkbox"/>	
Preno, Alisha - 532099		0%	\$872.28	9%	\$0.00	0%	\$872.28	9%	<input type="checkbox"/>	
Reuter, Darlene - 526107		0%	\$1,960.44	18%	\$0.00	0%	\$1,960.44	18%	<input type="checkbox"/>	
Wolf, Roman - 008009		10%	\$2,074.14	4%	\$0.00	0%	\$2,074.14	4%	<input type="checkbox"/>	
Wolf, Roman - 008009	STATE...	10%	\$0.00	0%	\$729.48	1%	\$729.48	1%	<input type="checkbox"/>	

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Notes Attachments Transactions Activity Log Email 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
09/02/2016 5:29 PM	Preno, Alisha - 532099		Statement updated: payroll \$145.38
09/02/2016 5:29 PM	Preno, Alisha - 532099		Statement updated: payroll \$145.38
09/02/2016 5:29 PM	Preno, Alisha - 532099		Statement updated: payroll \$145.38
09/02/2016 5:29 PM	Preno, Alisha - 532099		Statement updated: payroll \$145.38
09/02/2016 5:29 PM	Preno, Alisha - 532099		Statement updated: payroll \$145.38
09/02/2016 5:29 PM	Preno, Alisha - 532099		Statement updated: payroll \$145.38
09/02/2016 4:48 PM	Reuter, Darlene - 526107		Statement updated: payroll \$326.74
09/02/2016 4:48 PM	Reuter, Darlene - 526107		Statement updated: payroll \$326.74
09/02/2016 4:48 PM	Reuter, Darlene - 526107		Statement updated: payroll \$326.74
09/02/2016 4:48 PM	Reuter, Darlene - 526107		Statement updated: payroll \$326.74
09/02/2016 4:48 PM	Reuter, Darlene - 526107		Statement updated: payroll \$326.74
09/02/2016 4:48 PM	Reuter, Darlene - 526107		Statement updated: payroll \$326.74
09/02/2016 3:34 PM	Wolf, Roman - 008009	STATE-ORA019-00211-00000	Statement updated: cost share \$121.58
09/02/2016 3:34 PM	Wolf, Roman - 008009	STATE-ORA019-00211-00000	Statement updated: cost share \$121.58
09/02/2016 3:34 PM	Wolf, Roman - 008009	STATE-ORA019-00211-00000	Statement updated: cost share \$121.58

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
09/05/2016 4:47 PM	Roman Wolf - 008009	The project statement was viewed.
09/05/2016 4:47 PM	Roman Wolf - 008009	The project statement was certified.
09/05/2016 4:47 PM	Roman Wolf - 008009	The project statement was viewed.
09/05/2016 4:46 PM	System User - 444-44-4444	The project statement was viewed.
09/05/2016 4:14 PM	Deborah Bellgardt - 505802	The project statement was viewed.
09/05/2016 4:14 PM	Deborah Bellgardt - 505802	The Pre Review of the project statement is complete.
09/05/2016 4:07 PM	Deborah Bellgardt - 505802	The attachment 8a8c025a56bdc5e80156ec94708a6de0_20160905040705.png was added to this project statement.
09/05/2016 4:02 PM	Deborah Bellgardt - 505802	The project statement was viewed.
09/05/2016 1:48 PM	Deborah Bellgardt - 505802	The project statement was viewed.

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

- All notification emails and all reminder emails specific to the statement
- 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 Certifier or reopened.

Project Statement for C3106792: Development of a clinical hemoglobin modulator (Q3 2016): effort from 1/1/2016 to 3/31/2016, due date 9/4/2016, Status: Ready for Pre Review

Employee	CS Fund	Committed Effort	Payroll Dollars	Payroll Effort	Cost Share Dollars	Cost Share Effort	Total Payroll \$	Certified Effort	Certify?	Action
Carey, David - 005089		0%	\$1,237.56	10%	\$0.00	0%	\$1,237.56	10%	<input type="checkbox"/>	✓
Preno, Alisha - 532099		0%	\$872.28	9%	\$0.00	0%	\$872.28	9%	<input type="checkbox"/>	✓
Reuter, Darlene - 526107		0%	\$1,960.44	18%	\$0.00	0%	\$1,960.44	18%	<input type="checkbox"/>	✓
Wolf, Roman - 008009		10%	\$2,074.14	4%	\$0.00	0%	\$2,074.14	4%	<input type="checkbox"/>	✓
Wolf, Roman - 008009	STATE...	10%	\$0.00	0%	\$729.48	1%	\$729.48	1%	<input type="checkbox"/>	✓

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Email Log

Email Log		
Date	User	Action
08/25/2016 4:18 PM	System User - 444-44-4444	The certification period opening email was sent to the PI of this project.

Pre Review

After reviewing the project statement, if **no changes** are needed, Pre Review the project statement by selecting the **Pre Review** button.

Employee	CS Fund	Committed Effort	Payroll Dollars	Payroll Effort	Cost Share Dollars	Cost Share Effort	Total Payroll \$	Certified Effort	Certify?	Action
Carey, David - 005089		0%	\$1,237.56	10%	\$0.00	0%	\$1,237.56	10%	<input type="checkbox"/>	
Preno, Alisha - 532099		0%	\$872.28	9%	\$0.00	0%	\$872.28	9%	<input type="checkbox"/>	
Reuter, Darlene - 526107		0%	\$1,960.44	18%	\$0.00	0%	\$1,960.44	18%	<input type="checkbox"/>	
Wolf, Roman - 008009		10%	\$2,074.14	4%	\$0.00	0%	\$2,074.14	4%	<input type="checkbox"/>	
Wolf, Roman - 008009	STATE...	10%	\$0.00	0%	\$729.48	1%	\$729.48	1%	<input type="checkbox"/>	

Get Help Pre Review Home

Notes

Attachments

Transactions

Activity Log

Email Log

The page refreshes and is now in the status **Pre Reviewed**.

Employee	CS Fund	Committed Effort	Payroll Dollars	Payroll Effort	Cost Share Dollars	Cost Share Effort	Total Payroll \$	Certified Effort	Certify?	Action
Carey, David - 005089		0%	\$1,237.56	10%	\$0.00	0%	\$1,237.56	10%	<input type="checkbox"/>	
Preno, Alisha - 532099		0%	\$872.28	9%	\$0.00	0%	\$872.28	9%	<input type="checkbox"/>	
Reuter, Darlene - 526107		0%	\$1,960.44	18%	\$0.00	0%	\$1,960.44	18%	<input type="checkbox"/>	
Wolf, Roman - 008009		10%	\$2,074.14	4%	\$0.00	0%	\$2,074.14	4%	<input type="checkbox"/>	
Wolf, Roman - 008009	STATE...	10%	\$0.00	0%	\$729.48	1%	\$729.48	1%	<input type="checkbox"/>	

Get Help Home









Status: Pre Reviewed

After reviewing the project statement, **if changes are needed**, the PEC/GM must make the changes in PeopleSoft **prior** to Pre Reviewing the project statement. A cost transfer must be submitted in PeopleSoft to make the necessary effort correction(s). Once the cost transfer has posted to the GL in PeopleSoft, the new payroll transactions will load to the project statement overnight. At this time the project statement can be reviewed to ensure the payroll is now correct and the Pre Review process can be completed. Do not mark a project statement as Pre Reviewed if the data is not correct.

Return to the **Subactivities** tab on the **Home Page** to continue Pre Reviewing remaining project statements.

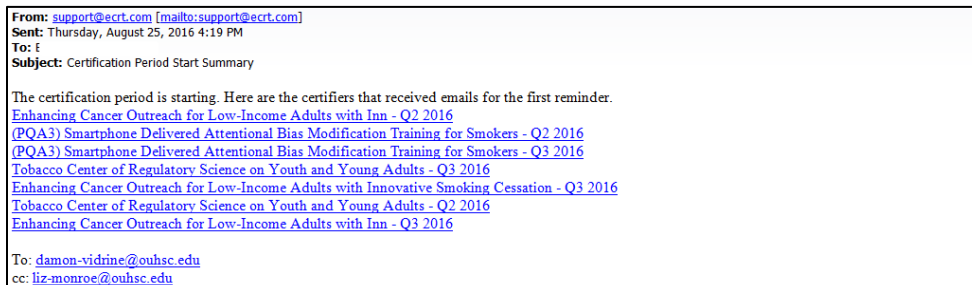
Statements Awaiting Certification		Associated Certifiers (0)		Assigned Subactivities (33)			
Principal Investigator	Project Title	Subactivity Name	Account Number	Sponsor Name	Period	Status	Staff
Papin, James	Baboon Model of Pertussis Disease ...	C1077401	C1077401	Food and Drug Administration	Q1 2017	Ready for Pre Review	
Papin, James	Baboon Model of Pertussis Disease ...	C1077401	C1077401	Food and Drug Administration	Q3 2016	Ready for Pre Review	
Papin, James	Baboon Model of Pertussis Disease ...	C1077401	C1077401	Food and Drug Administration	Q4 2016	Ready for Pre Review	
White, Gary	Baboon Research Resource Program	C1162118	C1162118	National Center for Research R...	Q1 2017	Ready for Pre Review	
White, Gary	Baboon Research Resource Program	C1162119	C1162119	National Center for Research R...	Q1 2017	Ready for Pre Review	

The project statement that was Pre Reviewed now appears on the Subactivities tab in the status, **Pre Reviewed**.

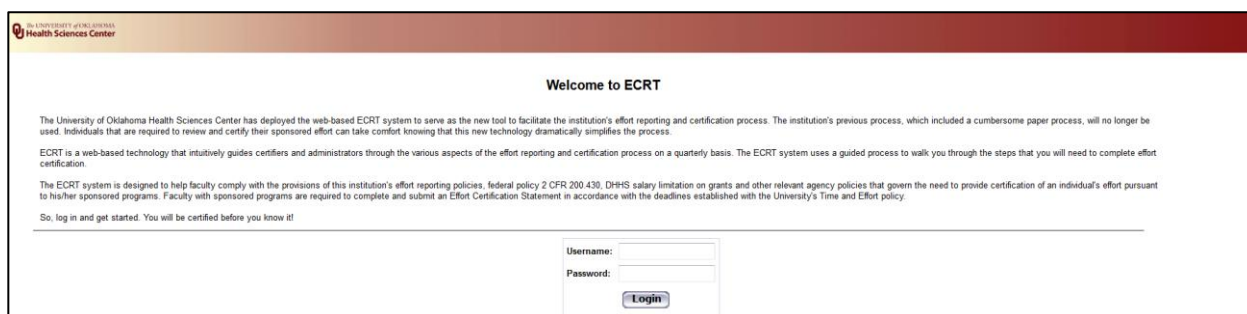
Statements Awaiting Certification		Associated Certifiers (0)		Assigned Subactivities (33)			
Principal Investigator	Project Title	Subactivity Name	Account Number	Sponsor Name	Period	Status	Staff
Papin, James	Baboon Model of Pertussis Disease ...	C1077401	C1077401	Food and Drug Administration	Q1 2017	 Ready for Pre Review	
Papin, James	Baboon Model of Pertussis Disease ...	C1077401	C1077401	Food and Drug Administration	Q3 2016	 Ready for Pre Review	
Papin, James	Baboon Model of Pertussis Disease ...	C1077401	C1077401	Food and Drug Administration	Q4 2016	 Ready for Pre Review	
Wolf, Roman	Development of a clinical hemoglobin ...	C3100702	C3100702	Phoenicia Biosciences, Inc.	Q1 2017	 Pre Reviewed	

Understanding the Certification Process

When the certification period begins, the PI will receive a system generated email notifying them that their project statements are **Ready for Certification**.

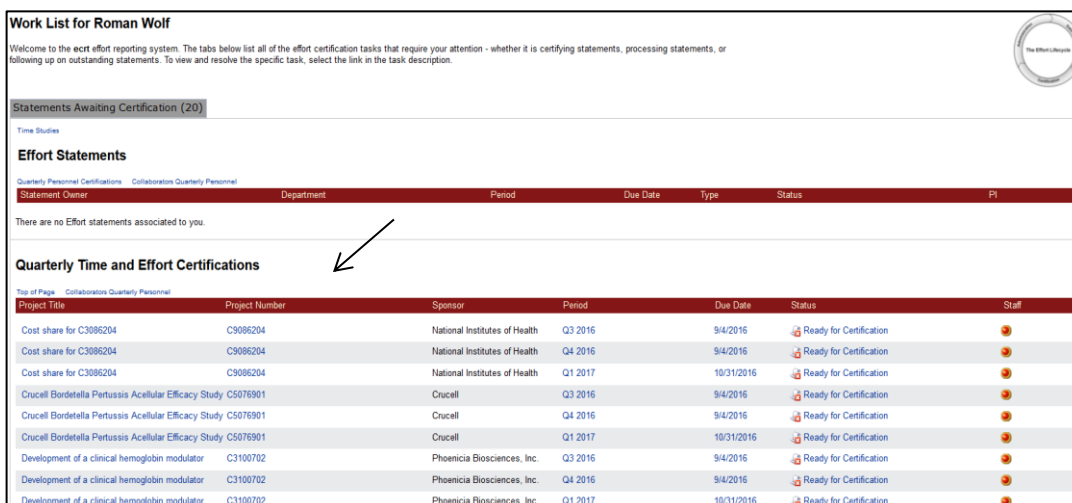


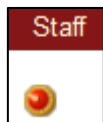
The PI will click the hyperlink next to the project name. The ecrt login page appears. The PI will login by using their OUHSC credentials.



After logging in, the Work List will appear. Under the Statements Awaiting Certification tab and the Quarterly Time and Effort Certifications header, all project statements that are **Ready for Certification** will appear.

If the PI clicked directly on the project hyperlink from the email, the PI will be routed directly to the project statement after logging in.





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

Quarterly Time and Effort Certifications									
Top of Page Collaboration Quarterly Personnel									
Project Title	Project Number	Sponsor	Staff for Development of a clinical hemoglobin modulator - Q1 2017						
Cost share for C3086204	C9086204	National Institutes of Health	Employee						
Cost share for C3086204	C9086204	National Institutes of Health	David Carey - 005089						
Cost share for C3086204	C9086204	National Institutes of Health	Alisha Preno - 532099						
Cost share for C3086204	C9086204	National Institutes of Health	Darlene Reuter - 526107						
Cost share for C3086204	C9086204	National Institutes of Health	Roman Wolf - 008009						
Cruceil Bordetella Pertussis Acellular Efficacy Study C5076901	C5076901	Cruceil							
Cruceil Bordetella Pertussis Acellular Efficacy Study C5076901	C5076901	Cruceil							
Cruceil Bordetella Pertussis Acellular Efficacy Study C5076901	C5076901	Cruceil							
Development of a clinical hemoglobin modulator	C3100702	Phoenicia Biosciences, Inc.	Q3 2016	9/4/2016	Ready for Certification				
Development of a clinical hemoglobin modulator	C3100702	Phoenicia Biosciences, Inc.	Q4 2016	9/4/2016	Ready for Certification				
Development of a clinical hemoglobin modulator	C3100702	Phoenicia Biosciences, Inc.	Q1 2017	10/31/2016	Ready for Certification				

The PI can click any hyperlink to navigate to the project statement.

Work List

Work List - 000000

Ready for Certification

C3086203

OUHSC Specific Pathogen Free Baboon Research

Q3 2016

C3086204

OUHSC Specific Pathogen Free Baboon Research

Q3 2016

C3086204

OUHSC Specific Pathogen Free Baboon Research

Q4 2016

C3086204

OUHSC Specific Pathogen Free Baboon Research

Q1 2017

C3100702

Development of a clinical hemoglobin modulator

Q3 2016

C3100702

Development of a clinical hemoglobin modulator

Q4 2016

C3100702 - Development of a clinical hemoglobin modulator

Project Information

Org: GRA019 - GRA019 - Comparative Medicine

Project Title: Development of a clinical hemoglobin modulator

Program: 00012

Award Number: 20140906

Subactivity Funding Dates: 05/01/2015 to 04/30/2017

Project Statement for C3100702: Development of a clinical hemoglobin modulator (Q1 2017): effort from 7/1/2016 to 9/30/2016, due date 9/31/2016, Status: Ready for Certification

INFO - Check all certify checkboxes to show the certify button.

Employee	CS Fund	Committed Effort	Payroll Dollars	Payroll Effort	Cost Share Dollars	Cost Share Effort	Total Payroll \$	Certified Effort	Certify?	Action
Carey, David - 005089		0%	\$206.26	3%	\$0.00	0%	\$206.26	3%	<input type="checkbox"/>	
Preno, Alisha - 532099		0%	\$50.15	1%	\$0.00	0%	\$50.15	1%	<input type="checkbox"/>	
Reuter, Darlene - 526107		0%	\$177.84	3%	\$0.00	0%	\$177.84	3%	<input type="checkbox"/>	
Wolf, Roman - 008009		10%	\$138.28	1%	\$0.00	0%	\$138.28	1%	<input type="checkbox"/>	
Wolf, Roman - 008009	STATE...	10%	\$0.00	0%	\$48.63	0%	\$48.63	0%	<input type="checkbox"/>	

Get Help

Notes

Attachments

Transactions

Activity Log

Email Log

Get Help


Get Help

Get Help




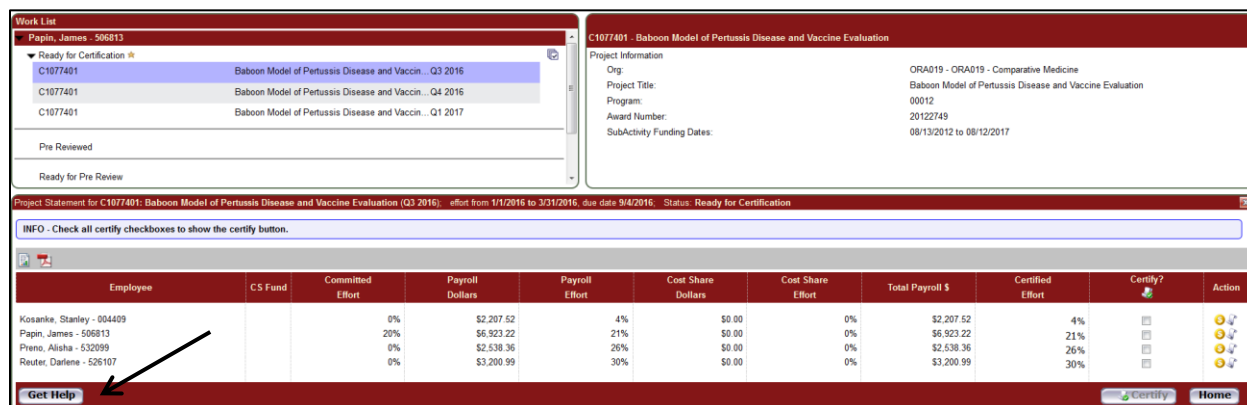
The PI can click the Select All icon located on the top left work list pane to view all project statements on one screen. Although all project statements will appear on the page, each statement will need to be certified individually.





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

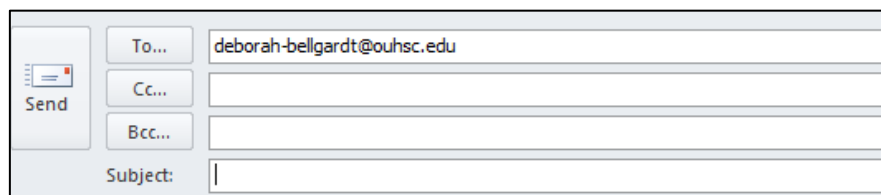
 The PI can run the Payroll Report as well as view the total payroll for an individual on their project statement.

After reviewing the project statement, **if changes are needed**, the PEC/GM must make the changes in PeopleSoft **prior** to the PI certifying the project statement. A cost transfer must be submitted in PeopleSoft to make the necessary effort correction(s). Once the cost transfer has posted to the GL in PeopleSoft, the new payroll transactions will load to the project statement overnight. At this time the project statement can be reviewed to ensure the payroll is now correct and the certification process can be completed. The PI should not certify a project statement if the data is not correct.

 The PI will be able to use the **Get Help** button to send emails to the PEC or GM, whoever is assigned to that project. A new email window will generate, pre populated with the project PEC or GM.



Employee	C.S Fund	Committed Effort	Payroll Dollars	Payroll Effort	Cost Share Dollars	Cost Share Effort	Total Payroll \$	Certified Effort	Certify?	Action
Kosanke, Stanley - 004409		0%	\$2,207.52	4%	\$0.00	0%	\$2,207.52	4%	<input type="checkbox"/>	
Papin, James - 506813		20%	\$6,923.22	21%	\$0.00	0%	\$6,923.22	21%	<input type="checkbox"/>	
Preno, Alisha - 532099		0%	\$2,538.36	26%	\$0.00	0%	\$2,538.36	26%	<input type="checkbox"/>	
Reuter, Darlene - 526107		0%	\$3,200.99	30%	\$0.00	0%	\$3,200.99	30%	<input type="checkbox"/>	



To...: deborah-bellgardt@ouhsc.edu

Cc...:

Bcc...:

Subject:

Send

After reviewing the project statement, if **no changes** are needed, the PI can **Certify** the project statement. They must select **all** of the checkboxes under the Certify column by selecting the icon underneath the word Certify, or individually selecting each box.

The screenshot shows the 'Certify?' button highlighted in a red box. The button is located in the top right corner of the interface, next to a green checkmark icon. The interface also displays a table with employee data and a 'Certify?' column with checkboxes.

Employee	CS Fund	Committed Effort	Payroll Dollars	Payroll Effort	Cost Share Dollars	Cost Share Effort	Total Payroll \$	Certified Effort	Certify?	Action
Kosanke, Stanley - 004409		0%	\$2,207.52	4%	\$0.00	0%	\$2,207.52	4%	<input type="checkbox"/>	
Papin, James - 506813		20%	\$6,923.22	21%	\$0.00	0%	\$6,923.22	21%	<input type="checkbox"/>	
Preno, Alisha - 532099		0%	\$2,538.36	26%	\$0.00	0%	\$2,538.36	26%	<input type="checkbox"/>	
Reuter, Darlene - 526107		0%	\$3,200.99	30%	\$0.00	0%	\$3,200.99	30%	<input type="checkbox"/>	

After checking all of the checkboxes, the **Certify** button appears. The PI will click this button and the Attestation statement will appear.

The screenshot shows the 'Certify' button highlighted in a green box. The button is located in the bottom right corner of the interface, next to a green checkmark icon. The interface also displays a table with employee data and a 'Certify?' column with checkboxes.

Employee	CS Fund	Committed Effort	Payroll Dollars	Payroll Effort	Cost Share Dollars	Cost Share Effort	Total Payroll \$	Certified Effort	Certify?	Action
Kosanke, Stanley - 004409		0%	\$2,207.52	4%	\$0.00	0%	\$2,207.52	4%	<input checked="" type="checkbox"/>	
Papin, James - 506813		20%	\$6,923.22	21%	\$0.00	0%	\$6,923.22	21%	<input checked="" type="checkbox"/>	
Preno, Alisha - 532099		0%	\$2,538.36	26%	\$0.00	0%	\$2,538.36	26%	<input checked="" type="checkbox"/>	
Reuter, Darlene - 526107		0%	\$3,200.99	30%	\$0.00	0%	\$3,200.99	30%	<input checked="" type="checkbox"/>	

The PI must click **I Agree** to complete the certification.

The screenshot shows the 'Attestation' form. It contains fields for Account Title, Account Name, Period, Certifier, and Personnel Being Certified. Below these fields is a text box for the Principal Investigator's statement. At the bottom, there are 'I Agree' and 'Cancel' buttons.

Attestation

Account Title: Baboon Model of Pertussis Disease and Vaccine Evaluation

Account Name: C1077401 - Baboon Model of Pertussis Disease and Vaccine Evaluation

Period: Q3 2016

Certifier: Papin, James - 506813

Personnel Being Certified: Kosanke, Stanley - 004409
Papin, James - 506813
Preno, Alisha - 532099
Reuter, Darlene - 526107

As Principal Investigator of the project cited above, I do hereby certify that the costs contained in this report represent an accurate, allowable, reasonable and allocable cost benefit to the stated objectives of the identified project. I understand that it is my contractual and/or legal obligation to promptly notify Grants and Contracts Accounting of any changes, adjustments, or corrections that need to be made to reflect actual effort expended on this project for the designated time period.

I Agree **Cancel**

The statement refreshes and updates to the status **Certified**.

Project Statement for C1077401: Baboon Model of Pertussis Disease and Vaccine Evaluation (Q3 2016) - effort from 1/1/2016 to 3/31/2016 - Status: **Certified**

Employee	CS Fund	Committed Effort	Payroll Dollars	Payroll Effort	Cost Share Dollars	Cost Share Effort	Total Payroll \$	Certified Effort	Certify?	Action
Kosanke, Stanley - 004409		0%	\$2,207.52	4%	\$0.00	0%	\$2,207.52	4%	<input checked="" type="checkbox"/>	
Papin, James - 506813		20%	\$6,923.22	21%	\$0.00	0%	\$6,923.22	21%	<input checked="" type="checkbox"/>	
Preno, Alisha - 532099		0%	\$2,538.36	26%	\$0.00	0%	\$2,538.36	26%	<input checked="" type="checkbox"/>	
Reuter, Darlene - 526107		0%	\$3,200.99	30%	\$0.00	0%	\$3,200.99	30%	<input checked="" type="checkbox"/>	

Get Help

Home

The PI can return to his/her Home Page to certify any remaining project statements.
Note: The project statement will drop off the Work List after it is certified.

Statements Awaiting Certification (2)

Time Studies

Effort Statements

Quarterly Personnel Certifications

Collaborators Quarterly Personnel

Statement Owner	Department	Period	Due Date	Type	Status	PI
There are no Effort statements associated to you.						

Quarterly Time and Effort Certifications

Top of Page

Collaborators Quarterly Personnel

Project Title	Project Number	Sponsor	Period	Due Date	Status	Staff
Baboon Model of Pertussis Disease and Vaccine E...	C1077401	Food and Drug Administration	Q4 2016	9/4/2016	Ready for Certification	
Baboon Model of Pertussis Disease and Vaccine E...	C1077401	Food and Drug Administration	Q1 2017	10/31/2016	Ready for Certification	

Reopening a Project Statement

If a payroll transaction occurs that effects a **certified** project statement, a PAR task will appear in ecrt for the GCA to review.

Statements Awaiting Certification	Effort Tasks (2)	Associated Certifiers	
Assigned Subactivities			
Type	Identifier	Name	Date
Process Project Payroll Adjustment	C1079603	Coupling PKA Signaling to the Adenomatous Polypsis Coli	09/08/2016 6:02 PM
Process Project Payroll Adjustment	C1079603	Coupling PKA Signaling to the Adenomatous Polypsis Coli	08/17/2016 3:35 PM

The GCA can then Post the payroll transaction to the Project Statement and reopen the statement for recertification.

Project Payroll Adjustment Reconciliation

The Project Payroll Adjustment Reconciliation page presents to administrators payroll transactions that impact historical 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:	C3077005	Account Name:	Oklahoma Sigmens Syndrome Center of Research Translati
Period of Performance:	Q3 2016	Primary Investigator:	Scofield, Robert - 006469
Department:	Medicine - Endocrinology	Grant Manager:	Wood, Becky - 506090 (PEC)

Project Payroll Reconciliation Transaction Break Down

Certifier	Object Code	Original Payroll Amount	Original Cost Share Amount	Certified Pct	New Payroll Loaded	New Cost Share Loaded	New Payroll Amount	New Cost Share Amount	New Cost Share Pct	New Payroll Pct	New Computed Pct
Scofield, Robert - 006469	STATE-COM215-00111-M3157	\$ 0	\$ 1,312.62	8.00%	\$ 0	\$ 7,000	\$ 0	\$ 8,312.62	35.06%	0.00%	35.06%

Post & Reopen
View Project Statement

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

Project Certification Reports

There are multiple reports the PEC/GM can use to report information about project statements.

Project Certification Status Summary Report

The Project Certification Status Summary Report is a useful tool to obtain a quick summary of the number of project statements in every status for each certifier or department for a period of performance.

Navigate to the Reports Page > Select Management from the Category header > Find Project Certification Status Summary Report in the Reports header

Select any one of the statuses from the Available Status box and move it over individually by clicking the single right arrow, or select all of the statuses by clicking the double right arrow.

Search by the PI or the School/Department. Note: if the PI and School/department fields are left unpopulated, the summary report will display results for all PIs and Departments to which the user has access.

If using the Dates method (see above) to run the report, the user must enter a Start Date and End Date for which to run the report.

Search by Employee Type and Performance Period by selecting **OUHSC** and a pre populated period from the drop down menu.

ParametersResults

Available Status

[Available Options]
Default, Incorrect
Auto Approved
No Certification Required
Manual Certification
No Certification Required, Payroll Pending
Manual Certification, Payroll Pending

Selected Status

[Selected Statuses]
Ready for Certification

>
>>
<
<<

PI:
School / Department: Peds - Gastroenterology
Expand Search
Date By:
☐ Dates ☒ Employee Type
Employee Type: OUHSC
Period: 1/1/2016 to 3/31/2016
Run Report

Click Run Report.

The Department Name is displayed, followed by the total number of project statements in each of the statuses listed in the columns.

ParametersResults	
Department Name	Ready for Certification
Peds - Gastroenterology	10
Excel XML PDF RTF	

Note: The report can be exported into excel by clicking the excel hyperlink at the bottom of the report

Project Status Report

The Project Status Report is a useful tool to view a list of all project statements that have a specified status at the time the report is run.

Navigate to the Reports Page > Select Management from the Category header > Find Project Status Report in the Reports header

Select any one of the statuses from the Available Status box and move it over individually by clicking the single right arrow, or select all of the statuses by clicking the double right arrow.

The screenshot displays the 'Parameters' tab of the Project Status Report interface. It features two main sections: 'Available Status' and 'Selected Status'. The 'Available Status' section contains a list of status options: '[Available Options]', 'Default, Incorrect', 'Auto Approved', 'No Certification Required', 'Manual Certification', 'No Certification Required, Payroll Pending', and 'Manual Certification, Payroll Pending'. The 'Selected Status' section shows '[Selected Statuses]' with 'Ready for Certification' selected. Between these sections are four buttons: a single right arrow (>), a double right arrow (>>), a single left arrow (<), and a double left arrow (<<). Below these sections are search filters: 'PI:' (empty), 'School / Department:' (filled with 'Peds - Gastroenterology'), and 'Date By:' (radio buttons for 'Dates' and 'Employee Type', with 'Dates' selected). The 'Dates' section includes 'Start Date:' (filled with '01/01/2016') and 'End Date:' (filled with '03/31/2016'). An 'Expand Search' link is located below the 'School / Department:' field. At the bottom left is a 'Run Report' button.

Search by the PI or the School/Department. Note: if the PI and school/department fields are left unpopulated, the summary report will display results for all PIs and Departments to which the user has access.

If using the Dates method (see above) to run the report, the user must enter a Start Date and End Date for which to run the report.

Search by Employee Type and Performance Period by selecting **OUHSC** and a pre populated period from the drop down menu.

ParametersResults

Available Status

In Progress
Ready for Pre Review
Pre Reviewed
Certified
Certified, Payroll Pending
Ready for Recertification
Ready for Certification, Re-Opened

Selected Status

[Available Options]
Ready for Certification

PI:

School / Department:

Peds - Gastroenterology

Expand Search

Date By:

☐ Dates
☒ Employee Type

Employee Type:

OUHSC

Period:

1/1/2016 to 3/31/2016

Run Report

The report generates a list of all individual project statements that match the parameters of the search. The results display the Project's Nickname, Project Number, Grant Department, Grant Manager, PI Certifier, PI Department, (Period) Nickname, and the Current Status of the project statement for the period. Sort the results by clicking on the column headers.

Project Nickname	Project Number	Grant Department	Grant Manager	PI Certifier	PI Department	Nickname	Current Status
A Multicenter, Prospective, Long-Term, Observational Reg	C8095701	Peds - Gastroenterology	N/A	Grunow, John - 006688	Pediatrics	Q2 2016	Ready for Certification
A Multicenter, Prospective, Long-Term, Observational Reg	C8095701	Peds - Gastroenterology	N/A	Grunow, John - 006688	Pediatrics	Q3 2016	Ready for Certification
A Multicenter, Randomised, Placebo-controlled, Double-bl	C8288301	Peds - Gastroenterology	N/A	Altat, Muhammad - 517042	Pediatrics	Q3 2016	Ready for Certification
Evaluation of PROMIS Measures for Pediatric Inflammatory	C7063301	Peds - Gastroenterology	N/A	Grunow, John - 006688	Pediatrics	Q3 2016	Ready for Certification

ExcelXMLPDFRTF

Note: The report can be exported into excel by clicking the excel hyperlink at the bottom of the report

Payroll Report

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

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

Enter the employee's name, department, or account number and define the date range for this report.

Parameters	Results
Employee:	<input type="text"/>
School / Department:	Medicine - Endocrinology
Expand Search	
Account:	<input type="text"/> <input checked="" type="radio"/> Active <input type="radio"/> Inactive
Search By Statement Type:	<input checked="" type="checkbox"/> Base <input type="checkbox"/> Non-IBS <input type="checkbox"/> Other
Date By:	<input checked="" type="radio"/> Dates <input type="radio"/> Employee Type
Dates:	Start Date: <input type="text" value="01/01/2016"/> End Date: <input type="text" value="03/31/2016"/>
Run Report	

You can also search by Employee Type and Performance Period by selecting **OUHSC** and a pre populated period from the drop down menu.

Parameters	Results
Employee:	<input type="text"/>
School / Department:	Medicine - Endocrinology
Expand Search	
Account:	<input type="text"/> <input checked="" type="radio"/> Active <input type="radio"/> Inactive
Search By Statement Type:	<input checked="" type="checkbox"/> Base <input type="checkbox"/> Non-IBS <input type="checkbox"/> Other
Date By:	<input type="radio"/> Dates <input checked="" type="radio"/> Employee Type
Employee Type:	<input type="text" value="OUHSC"/>
Period:	<input type="text" value="1/1/2016 to 3/31/2016"/>
Run Report	

Note: The report can be exported into excel by clicking the excel hyperlink at the bottom of the report

Payroll Report by Department -

The report displays the name of the employee, the employee's primary department name and number, the account (shown below as Grant), the pay period, the payroll amount, the percentage of the total statement payroll for the account, the pay type, and the employee type of the individual at the time the statement was created.

ParametersResults

• Pay Period View

• Account View

66 items found, displaying all items.

Certifier	Department	Department Number	Grant	Pay Period	Payroll	Pay %	Pay Type	Employee Type	Statement Type						
Le, Yun - 507184	Medicine - Endocrinology	COM215	C1062901 - Stem cell characteristics of Müller glia for retinal neu	01/10/2016 to 01/23/2016	\$961.54	20 %	HR	OUHSC Personnel	Base						
			Subtotal		\$961.54	20 %									
			C5078002 - Year 2 - A novel humanized antibody blocking the Wnt pat	01/10/2016 to 01/23/2016	\$1,201.92	25 %	HR	OUHSC Personnel	Base						
			Subtotal		\$1,201.92	25 %									
			C5090501 - Mechanism of Retinal Degeneration	01/10/2016 to 01/23/2016	\$192.31	4 %	HR-CS	OUHSC Personnel	Base						
			Subtotal		\$288.46	6 %	HR-CS	OUHSC Personnel	Base						
			C9087401 - Cost Share C9087401	01/10/2016 to 01/23/2016	\$576.92	12 %	HR	OUHSC Personnel	Base						
			Subtotal		\$576.92	12 %									
			C9089501 - Cost Share C5089501	01/10/2016 to 01/23/2016	\$480.77	10 %	HR	OUHSC Personnel	Base						
			Subtotal		\$480.77	10 %									
			EC234500 - Awarded Endowed Chair	01/10/2016 to 01/23/2016	\$673.08	14 %	HR	OUHSC Personnel	Base						
			Subtotal		\$673.08	14 %									
			MSCA-COM215-00311-M3187 - MSCA-COM215-00311-M3187	01/10/2016 to 01/23/2016	\$432.69	9 %	HR	OUHSC Personnel	Base						
			Subtotal		\$432.69	9 %									
			Certifier Total for Period		\$4,807.69	100 %									
			Li, Hong Liang - 526564	Medicine - Endocrinology	COM215	C3106601 - Autoimmune basis for postural tachycardia syndrome	01/10/2016 to 01/23/2016	\$1,889.54	100 %	HR	OUHSC Personnel	Base			
						Subtotal		\$1,889.54	100 %						
						Certifier Total for Period		\$1,889.54	100 %						
						Li, Manna - 534403	Medicine - Endocrinology	COM215	C3109001 - Mechanisms Regulating VEGF Receptors in Diabetic Angiogenesis	01/10/2016 to 01/23/2016	\$1,615.38	100 %	PR	OUHSC Personnel	Base
									Subtotal		\$1,615.38	100 %			
C5077202 - Year 2 - Role of Endothelial Autophagy in Diabetes	01/10/2016 to 01/23/2016	(\$1,615.38)							-100 %	PR	OUHSC Personnel	Base			
Subtotal		\$1,615.38							100 %	HR	OUHSC Personnel	Base			
Subtotal		\$0.00							0 %						
Certifier Total for Period		\$1,615.38							100 %						

Pay Type

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

HR (Regular Pay)

PR (Cost Transfer Regular Pay)

HR-CS (Regular Pay from a Cost Share fund code)

PR-CS (Cost Transfer from a Cost Share fund code)

Payroll Report by Employee –

For an employee, the report will show the pay that was charged to each account during each pay period within the Certification Period, the total amounts charged to each account during the period, and the percent of total pay during the period for each account.

The PEC must be associated to the employee's Home Department in order to run the payroll report for that employee. You can view the employee's home department on the department dashboard.

Certifier	Department	Department Number	Grant	Pay Period	Payroll	Pay %	Pay Type	Employee Type	Statement Type
Scofield, Robert - 006469	Medicine - Endocrinology	COM215	C1080303 - Yr3 - Clinical Resources KCA	12/27/2015 to 01/09/2016	\$1,395.77	25 %		OUHSC Personnel	Base
				12/27/2015 to 01/09/2016	\$388.14	7 %		OUHSC Personnel	Base
				01/10/2016 to 01/23/2016	\$1,395.77	25 %		OUHSC Personnel	Base
				01/10/2016 to 01/23/2016	\$388.14	7 %		OUHSC Personnel	Base
				Subtotal	\$3,567.82	84 %			
			C3077005 - Oklahoma Sjogrens Syndrome Center of Research Translati	12/27/2015 to 01/09/2016	\$218.77	4 %		OUHSC Personnel	Base
				12/27/2015 to 01/09/2016	\$779.06	14 %		OUHSC Personnel	Base
				01/10/2016 to 01/23/2016	\$218.77	4 %		OUHSC Personnel	Base
				01/10/2016 to 01/23/2016	\$779.06	14 %		OUHSC Personnel	Base
				Subtotal	\$1,995.66	36 %			
			HSPRM-COM215-00111-M3157 - HSPRM-COM215-00111-M3157	12/27/2015 to 01/09/2016	\$3.39	0 %		OUHSC Personnel	Base
				01/10/2016 to 01/23/2016	\$3.39	0 %		OUHSC Personnel	Base
				Subtotal	\$6.78	0 %			
Certifier Total for Period				\$5,570.26	100 %				
Total Of All Certifiers				\$5,570.26	100 %				
10 items found, displaying all items.									
Excel XML PDF RTF									

Payroll Report by Account –

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

Certifier	Department	Department Number	Grant	Pay Period	Payroll	Pay %	Pay Type	Employee Type	Statement Type
Cavett, Joshua - 505255	Medicine - Endocrinology	COM215	C3109801 - Oklahoma Rheumatic Disease Research Cores Center	12/27/2015 to 01/09/2016	\$102.31	8 %		OUHSC Personnel	Base
				01/10/2016 to 01/23/2016	\$237.70	19 %		OUHSC Personnel	Base
				01/24/2016 to 02/06/2016	\$177.88	14 %		OUHSC Personnel	Base
				02/07/2016 to 02/20/2016	\$255.38	20 %		OUHSC Personnel	Base
				02/21/2016 to 03/05/2016	\$252.13	20 %		OUHSC Personnel	Base
				03/06/2016 to 03/19/2016	\$231.05	18 %		OUHSC Personnel	Base
				Subtotal		\$1,256.45	100 %		
				Certifier Total for Period		\$1,256.45	100 %		
Koelsch, Kristi - 516726	Medicine - Endocrinology	COM215	C3109801 - Oklahoma Rheumatic Disease Research Cores Center	12/27/2015 to 01/09/2016	\$247.20	11 %		OUHSC Personnel	Base
				01/10/2016 to 01/23/2016	\$412.00	18 %		OUHSC Personnel	Base
				01/24/2016 to 02/06/2016	\$412.00	18 %		OUHSC Personnel	Base
				02/07/2016 to 02/20/2016	\$412.00	18 %		OUHSC Personnel	Base
				02/21/2016 to 03/05/2016	\$412.00	18 %		OUHSC Personnel	Base
				03/06/2016 to 03/19/2016	\$412.00	18 %		OUHSC Personnel	Base
				Subtotal		\$2,307.20	100 %		
				Certifier Total for Period		\$2,307.20	100 %		
Total Of All Certifiers			\$3,563.65	200 %					

12 items found, displaying all items.

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