Certifying a Statement That Requires Changes

The purpose of this job aid is to show certifiers (Principal Investigators and researchers) the two different ways an effort statement requiring changes may be certified. The instructions will be broken into two different sections based on the two types of changes that may be made to a statement.

Determine why the effort statement is inaccurate and requires changes:

A. If there are missing (not listed) sponsored or non-sponsored activities on the statement, refer to Scenario A.

B. If the Certified Effort column's boxes are inaccurate, refer to Scenario B.
Certifying a Statement That Requires Changes (cont.)

Scenario A: Requesting Changes because Sponsored or Non-Sponsored Activities are Missing

1. Since ECRT will not allow a new row to be inserted to add missing activities, no action must be taken on the statement at this time. Do NOT click <Certify>.

2. Contact the effort coordinator outside of ECRT to request the changes. To locate the effort coordinator:
   
   a. Expand the Certifiers and Approvers section at the bottom of the statement.

   b. Look to the Reason column on the right and find the person listed as “Department Effort Coordinator.”

   c. To the left, his or her name will appear. Click on it to initiate an email addressed to him/her.

   d. Provide the necessary information in the email and click <Send>, and log out of ECRT.

   e. The effort coordinator will be responsible for facilitating changes to the statement. Once the changes are made and the statement is accurate, the certifier must login to ECRT again to certify the updated statement.
Certifying a Statement That Requires Changes (cont.)

Scenario B: Requesting Changes because the Certified Effort Column is Inaccurate

1. At the bottom of the statement, click the notes icon.

2. The Create New Note text box will appear. Document why the changes are required. Click <Save Note>. Important: all notes are auditable.

3. In the center section of the statement, manually change the numbers in the Certified Effort column’s boxes to display the correct numbers. Note: once effort is changed in one box, changes must also be made to other boxes so that the Certified Effort column will total 100% (plus or minus two percent due to rounding).

4. Verify the totals are now correct. Select the checkbox by the Grand Total at the bottom of the statement. Doing so will automatically place a check mark into all checkboxes at once. Click <Certify>.

5. The legal attestation page will appear as a reminder that effort statements are auditable, and a legal attestation that the work was performed according to what appears on the statement. Click <I agree> and wait for the statement to process. Clicking on anything else while it is processing will often cause the statement to not be updated or certified.