

## Pre-Reviewing a Project Statement

As a Primary Department Coordinator, you are responsible for Pre Reviewing Project Statements before they are routed to the PI for confirmation. The Primary Department Coordinator will receive a system generated email notifying them that Project Statements are now in the status 'Ready for Pre Review'.

The Primary Department Coordinator will have **21 days\*** to Pre-Review all assigned project statements. Check the WMU website frequently as the amount of days for Pre-Review may change.

Click the hyperlink on the project name. The WMU authentication page will appear if you are not already logged in to the network. Login using your WMU credentials.

From: [wmu-ecrt@wmich.edu](mailto:wmu-ecrt@wmich.edu) [mailto:wmu-ecrt@wmich.edu]  
 Sent: Friday, July 13, 2018 1:28 PM  
 To: Jacob M O'Berry <[jacob.m.oberry@wmich.edu](mailto:jacob.m.oberry@wmich.edu)>  
 Subject: ACTION REQUIRED - The Project Confirmation Pre Review Period for <period 1> is Now Open

The Pre Review Period is now open in ecrt until <date>. As the Primary Department ecrt Coordinator, please review the project statements assigned to you by logging in via Chrome or Firefox here: <insert link>.

To complete the Pre Review Process:

1. Review the list of project personnel for this period to confirm that all employees were paid on the project for time worked during this period.
2. Review payroll information for each individual for accuracy.
3. Initiate any necessary adjustments as part of the Pre Review Process.
4. If the statement is correct, select the Pre Review button on the bottom right of the statement to send it to the PI's queue for review and confirmation.

Thank you!

[Summit Pointe Autism 17/18 - Spring 2018](#)  
[Home Visiting Services - Spring 2018](#)  
[TRC 16-03 Van Houten - Spring 2018](#)  
[Statistical CRT - Spring 2018](#)  
[Train the Trainer - Spring 2018](#)  
[School Based BA Services 17-18 - Spring 2018](#)

To: [michaeljordan@test.net](mailto:michaeljordan@test.net)

*Pre Review email sent from ecrt*

After logging in, click the Associated Project Statements tab to view all project statements that are Ready for Pre Review. Click any of the hyperlinks to navigate to the project statement.

Work List for Michael Jordan							
Statements Awaiting Confirmation				Assigned Project Statements			
Principal Investigator	Project Title	Fund and Dept ID	Account Number	Sponsor Name	Period	Status	Staff
Meadows, Steve	Molecular Electronics	25-7021430	25-7021430	National Security Agenc...	Spring 2018	🟡 Ready for Pre Review	●
Meadows, Steve	Wildcat Fusion Therapy	25-7024810	25-7024810	National Science Found...	Spring 2018	🟡 Ready for Pre Review	●
Meadows, Steve	Molecular Electronics	25-7021430	25-7021430	National Security Agenc...	Summer 2018	🟢 Current Period in Progress	●
Meadows, Steve	Wildcat Fusion Therapy	25-7024810	25-7024810	National Science Found...	Summer 2018	🟢 Current Period in Progress	●

The project statement appears.

**Work List**

▼ Meadows, Steve - 357211

Ready for Confirmation

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Pre Reviewed

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▼ Ready for Pre Review ★

25-7021430      Molecular Electronics      Spring 2018

25-7024810      Wildcat Fusion Therapy      Spring 2018

**25-7024810 - Wildcat Fusion Therapy**

Project Information

HR Department:                      DEPT0002 - Testing Department

Project Title:                         Wildcat Fusion Therapy

Project ID:                             COMMUTLZTNEBPR

Project Dates:                        06/24/2008 to 12/31/2018

Sponsor Award Number:            25-7019-0052-005

Project Statement: **25-7024810: Wildcat Fusion Therapy (Spring 2018)** ; Payroll from 1/1/2018 to 5/14/2018; Status: Ready for Pre Review

Employee	HR Department	Object Code	Payroll Dollars	Cost Share Dollars	Payroll + Cost Share Dollars	Confirm	Detail
Hanada, Molly - 357298	Training Department - D...	3218	\$3,750.00	\$1,000.00	\$4,750.00	<input type="checkbox"/>	\$
Karoli, Tim - 357295	Training Department - D...	3218	\$3,000.00	\$0.00	\$3,000.00	<input type="checkbox"/>	\$
Meadows, Steve - 357211	Training Department - D...	3112	\$24,000.00	\$0.00	\$24,000.00	<input type="checkbox"/>	\$

Pre Review
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▶ Notes

▶ Attachments

▶ Transactions ★

▶ Activity Log ★

Email Log

Notice the project is highlighted under the Work List in the left pane of the Project Statement. The Work List contains a complete list of all projects and their associated statuses so that you can see where statements are in the workflow.

★ Icon indicates there is at least one project statement in the corresponding status. Click anywhere on the status line and the project statement(s) will appear for you to review.

**Work List**

▼ Meadows, Steve - 357211

Ready for Confirmation ★

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Pre Reviewed

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▼ Ready for Pre Review ★

25-7021430      Molecular Electronics      Spring 2018

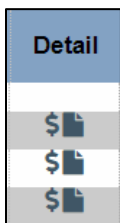
25-7024810      Wildcat Fusion Therapy      Spring 2018

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


Project Statement: 25-7024810: Wildcat Fusion Therapy (Spring 2018) ; Payroll from 1/1/2018 to 5/14/2018; Status: Ready for Pre Review							
Employee	HR Department	Object Code	Payroll Dollars	Cost Share Dollars	Payroll + Cost Share Dollars	Confirm	Detail
Hanada, Molly - 357298	Training Department - D...	3218	\$3,750.00	\$1,000.00	\$4,750.00	<input type="checkbox"/>	\$
Karoli, Tim - 357295	Training Department - D...	3218	\$3,000.00	\$0.00	\$3,000.00	<input type="checkbox"/>	\$
Meadows, Steve - 357211	Training Department - D...	3112	\$24,000.00	\$0.00	\$24,000.00	<input type="checkbox"/>	\$

During the Pre Review Process the Department Coordinator should:

1. Verify that all individuals that should be paid from the project or cost shared on the project appear on the project statement.
2. Compare the dollars per individual on the project statement to the project budget.
  - a. Do the amounts per individuals match what was requested to be entered by the payroll person?
  - b. If there is a variance between the expected amount and actual amount charged. Why?
  - c. Is an individual being cost shared when they should be direct charged or the reverse?
  - d. Is there anyone being charged to the project that you did not anticipate?
  - e. Is there anyone missing from the statement whose payroll should have been charged?
  - f. Other variances?
3. If a determination about the accuracy and completeness of the payroll expenditures cannot be made based on available information, the Department Coordinator may need to consult with others in the unit such as the Principal Investigator, Payroll, Grant Manager, etc. so that any missing or erroneous information can be corrected timely and will reduce the need for repeating the process at a future time.



To assist in Pre Reviewing the project statement, there are two payroll reports that you can run directly from the statement in the Detail column. These reports should be used to validate/compare payroll information that is available in GLOW and PeopleSoft pay earnings.

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

The report defaults on a Pay Period View showing the employee's payroll amount broken-down by pay period for the Project. The total payroll dollar column is the amount shown in the Total Payroll Dollar column on the Project Statement.

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

Parameters		Results									
<ul style="list-style-type: none"> <li>• Pay Period View</li> <li>• Account View</li> </ul>											
3 items found, displaying all items.											
Employee ID	First Name	Middle Init.	Last Name	Department	Department Number	Grant	Pay Period	Payroll	Pay Type	Employee Type	Statement Type
357295	Tim		Karoli	Training Department	DEPT0001	25-7024810 - Wildcat Fusion Therapy	01/01/2018 to 01/31/2018	\$1,000.00	25-7024810-3218-REG	WMU	IBS
							02/01/2018 to 02/28/2018	\$1,000.00	25-7024810-3218-REG	WMU	IBS
							03/01/2018 to 03/31/2018	\$1,000.00	25-7024810-3218-REG	WMU	IBS
							<b>Subtotal</b>	<b>\$3,000.00</b>			
<b>Certifier Total for Period</b>								<b>\$3,000.00</b>			
<b>Total Of All Certifiers</b>								<b>\$3,000.00</b>			
3 items found, displaying all items.											
<a href="#">Excel</a>   <a href="#">XML</a>   <a href="#">PDF</a>   <a href="#">RTF</a>											

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

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 HR department name and number, the Department ID (shown below as Grant), the pay period, the payroll amount, the pay type, and the employee type.

Employee ID	First Name	Middle Init.	Last Name	Department	Department Number	Grant	Pay Period	Payroll	Pay Type	Employee Type	Statement Type
357295	Tim		Karoli	Training Department	DEPT0001	25-7019820 - Studies on being a Scientist	01/01/2018 to 01/31/2018	\$1,000.00	25-7019820-3218-REG	WMU	IBS
							02/01/2018 to 02/28/2018	\$1,000.00	25-7019820-3218-REG	WMU	IBS
							03/01/2018 to 03/31/2018	\$1,000.00	25-7019820-3218-REG	WMU	IBS
							<b>Subtotal</b>	<b>\$3,000.00</b>			
						25-7024810 - Wildcat Fusion Therapy	01/01/2018 to 01/31/2018	\$1,000.00	25-7024810-3218-REG	WMU	IBS
							02/01/2018 to 02/28/2018	\$1,000.00	25-7024810-3218-REG	WMU	IBS
							03/01/2018 to 03/31/2018	\$1,000.00	25-7024810-3218-REG	WMU	IBS
							<b>Subtotal</b>	<b>\$3,000.00</b>			
<b>Certifier Total for Period</b>								<b>\$6,000.00</b>			
<b>Total Of All Certifiers</b>								<b>\$6,000.00</b>			
6 items found, displaying all items.											
<a href="#">Excel</a>   <a href="#">XML</a>   <a href="#">PDF</a>   <a href="#">RTF</a>											

View all payroll for an employee for the period by clicking the scroll icon under the Detail column. A pop up box will appear listing all the projects (both sponsored and non-sponsored) the employee was paid or cost shared from for the period. Each project is listed with the corresponding payroll dollar amount and percentage. The total percentage will equal 100%.

**Work List**

- ▼ Meadows, Steve - 357211
  - Ready for Confirmation
  - Pre Reviewed
- ▼ Ready for Pre Review ★
  - 25-7021430 Molecular Electronics Spring 2018
  - 25-7024810 Wildcat Fusion Therapy Spring 2018

**25-7024810 - Wildcat Fusion Therapy**

close

Project Payroll Summary - Spring 2018

Tim Karoli - 357295

Project Name	Payroll + Cost Share Dollars	Payroll + Cost Share
25-7019820-Studies on bei...	\$3,000.00	50%
25-7024810-Wildcat Fusio...	\$3,000.00	50%
<b>Total:</b>	<b>\$6,000.00</b>	<b>100.00%</b>

**Project Statement: 25-7024810: Wildcat Fusion Therapy (Spring 2018)**

Employee	HR Department	Object Code
Hanada, Molly - 357298	Training Department - D...	3218
Karoli, Tim - 357295	Training Department - D...	3218
Meadows, Steve - 357211	Training Department - D...	3112

Employee	HR Department	Object Code	Payroll Dollars	Cost Share Dollars	Payroll + Cost Share Dollars	Confirm	Detail
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Meadows, Steve - 357211	Training Department - D...	3112	\$24,000.00	\$0.00	\$24,000.00	<input type="checkbox"/>	\$

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

Project Statement: 25-7024810: Wildcat Fusion Therapy (Spring 2018) ; Payroll from 1/1/2018 to 5/14/2018; Status: Ready for Pre Review

Employee	HR Department	Object Code	Payroll Dollars	Cost Share Dollars	Payroll + Cost Share Dollars	Confirm	Detail
Hanada, Molly - 357298	Training Department - D...	3218	\$3,750.00	\$1,000.00	\$4,750.00	<input type="checkbox"/>	\$
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Meadows, Steve - 357211	Training Department - D...	3112	\$24,000.00	\$0.00	\$24,000.00	<input type="checkbox"/>	\$

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

Project Statement: 25-7024810: Wildcat Fusion Therapy (Spring 2018) ; Payroll from 1/1/2018 to 5/14/2018; Status: Pre Reviewed							
Employee	HR Department	Object Code	Payroll Dollars	Cost Share Dollars	Payroll + Cost Share Dollars	Confirm	Detail
Hanada, Molly - 357298	Training Department - D...	3218	\$3,750.00	\$1,000.00	\$4,750.00	<input type="checkbox"/>	\$
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After reviewing the project statement, if changes are needed, the Department Coordinator 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 payroll 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.