Payroll Confirmation – Department Coordinator Quick Guide to ecrt

A guide for Department Coordinators on understanding the project-based payroll confirmation process using ecrt. The Department Coordinator is responsible for Pre-Reviewing all sponsored project statements in their Department(s) on a semester basis. This is a required step in the confirmation workflow and the statement will not route to the Principal Investigator for formal confirmation until this step is complete. Both sponsored and non-sponsored project information can be viewed at any time in ecrt and we encourage Department Coordinators to review payroll information periodically and make any corrections in a timely manner.

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**Confirmation Workflow**

The confirmation workflow occurs on a semester basis – Fall, Spring, and Summer. All Principal Investigators (PI) will confirm the project statement after the Pre-Review step is complete and the Confirmation Period is open.
ecrt Login and Home Page

Login using your WMU BroncoNet ID credentials. Click the continue button on the Welcome Page. You will be routed to the Home Page.

The **Statements Awaiting Certification** tab displays Project statements that you are responsible for confirming. Most Department Coordinators will **not** see any statements in this section.

<table>
<thead>
<tr>
<th>Statements Awaiting Confirmation</th>
<th>Assigned Project Statements</th>
</tr>
</thead>
<tbody>
<tr>
<td>Statement Owner</td>
<td>Department</td>
</tr>
<tr>
<td>Period</td>
<td>Due Date</td>
</tr>
<tr>
<td>Type</td>
<td>Status</td>
</tr>
<tr>
<td>PI</td>
<td></td>
</tr>
</tbody>
</table>

There are no Payroll statements that need certification.

The **Assigned Project Statements** tab shows Project Statements associated to your assigned departments. This list will show Statements that are In Progress, Ready for Pre Review, and Ready for Confirmation. You can sort on all columns (except Sponsor Name).

**Work List for Michael Jordan**

Welcome to ecrt, Western Michigan University's Payroll Confirmation system. The tab(s) below contain various tasks that require your attention.

<table>
<thead>
<tr>
<th>Principal Investigator</th>
<th>Project Title</th>
<th>Fund and Dept ID</th>
<th>Account Number</th>
<th>Sponsor Name</th>
<th>Period</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Meadows, Steve</td>
<td>Molecular Electronics</td>
<td>25-7021430</td>
<td>25-7021430</td>
<td>National Security</td>
<td>Spring 2018</td>
<td>Ready for Pre Review</td>
</tr>
<tr>
<td>Meadows, Steve</td>
<td>Wildcat Fusion Therapy</td>
<td>25-7024810</td>
<td>25-7024810</td>
<td>National Science</td>
<td>Spring 2016</td>
<td>Ready for Pre Review</td>
</tr>
</tbody>
</table>
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.

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**From:** wmucert@wmich.edu  
**Sent:** Friday, July 13, 2018 1:28 PM  
**To:** Jacob M O’Berry  
**Subject:** ACTION REQUIRED - The Project Confirmation Pre Review Period for <period 1> is Now Open

The Pre Review Period is now open in ecr until <date>. As the Primary Department ecr 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

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**Pre Review email sent from ecr**

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.
The project statement appears.

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

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.

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.
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%.

After reviewing the project statement, if no changes are needed, Pre Review the project statement by clicking the Pre Review button.
The HR Department Dashboard is for Department Coordinators to review and manage the information related to the Department ID’s associated to that HR department.

Under the Manage tab on the navigation bar, click on HR Department Dashboard.

You will only have access to your assigned HR Department(s). Select a HR Department from the drop-down menu and select Choose.

The Project Confirmations tab contains Project Statements related to the Department ID’s that are associated to the HR Department. The top of the tab shows the Project Confirmation Summary Chart which shows the statistics for the most recent Period of Performance. You can filter on the Period to review another Confirmation Period. The chart will display the number of project statements in a status and that number represented as a percentage of all project statements in the HR Department for that period.
This tab includes current and historical Project Statements for both Sponsored and Non-Sponsored projects. You can route to any statement by clicking the status icon under the Statements column.

The **Fund and Dept ID** tab contains the Department ID’s that are assigned to the HR Department, both Sponsored and Non-Sponsored. The list displays the Department ID number, name, sponsor, PI, and the start and end dates.

Note, the ⚠️ next to the Project Name means the Project is inactive in ecr, meaning the end date has passed today’s current date. This does not relate to the Department ID being inactive in PeopleSoft.

The **HR Department Information** tab contains information about the HR Department including all Department Coordinators (Primary is highlighted) and the HR Department Relationship information.
Fund and Dept ID Summary Page

The Fund and Dept ID Summary Page shows detailed information about the Department ID including Name, PI, Sponsor Name, Sponsor Number, and Amount.

The Project Statements related to the Department ID can be found on this page under the Project Statements header.
Monitoring Reports

eCRT contains several reports to monitor the confirmation process. From the Navigation Menu, click Reports, and click Reporting.

**Project Status Report**

*Management > Project Status Report*

The Project Status Report shows a list of all Project Statements that have a specified status at the time the report is run. Select the status(es) for which to run the report by using the right arrow to move a status from the Available Status box into the Selected Status box. Next, enter the PI and/or department or school for which to run the report. Finally, enter the date parameters or select Employee Type. If Employee Type is selected, select “WMU” from the drop-down menu.

When the parameters are entered, select Run Report and the results will appear. The report generates a list of all Project Statements that match the parameters. 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. These results can be exported to EXCEL.
The PI and Staff Report displays a list of all individuals with all individuals charging a PI’s account(s) and their monthly salary charges on every account they are charging. The first input field is the name of the PI for whom the report is being generated. Select the IBS checkbox in the “Search by Statement Type” field. Then, enter the date parameters or select Employee Type. If Employee Type is selected, select “WMU” from the drop-down menu.

When the parameters are entered, select Run Report and the results will appear. The Name of the PI and his/her staff are listed with their corresponding payroll information for the dates entered in the parameters. The payroll information includes all accounts the person was paid from for the period. These results can be exported to EXCEL.
SPES Summary Report
Payroll/Cost Share > SPES Summary Report

The Sponsored Project Employee Summary (SPES) Summary report lists all employees that had salary charged or cost shared to a specific project for the specified date range selected. The first input field is the Account for which the report is being generated. Then, enter the date parameters or select Employee Type. If Employee Type is selected, select "WMU" from the drop-down menu.

When the parameters are entered, select Run Report and the results will appear. The report will show the employee’s total payroll and cost share for the selected date range and selected account. These results can be exported to EXCEL.
# Project Statement Statuses

<table>
<thead>
<tr>
<th>Status</th>
<th>Icon</th>
<th>Status Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current Period in Progress</td>
<td>![Icon]</td>
<td>This status indicates that a Project Statement is not yet ready for confirmation. This occurs during the Period of Performance, when payroll and profile data are being loaded and the Project Statements are building.</td>
</tr>
<tr>
<td>Auto Approved</td>
<td>![Checkmark]</td>
<td>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 when the confirmation period begins.</td>
</tr>
<tr>
<td>Ready for Pre Review</td>
<td>![Question Mark]</td>
<td>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 confirmation.</td>
</tr>
<tr>
<td>Pre Reviewed</td>
<td>![Play Button]</td>
<td>This status indicates that a Project Statement has been Pre Reviewed by a Department Coordinator.</td>
</tr>
<tr>
<td>Ready for Confirmation</td>
<td>![Plus Sign]</td>
<td>This status indicates that the Project Statement is ready to be confirmed. Statements move to this status when the Confirmation Period begins and the statement requires an individual to confirm the payroll charges for the period.</td>
</tr>
<tr>
<td>Confirmed</td>
<td>![Star]</td>
<td>This status indicates that an individual confirmed his/her Project Statement.</td>
</tr>
<tr>
<td>Confirmed, JES Pending</td>
<td>![Dollar Sign]</td>
<td>This status indicates that an individual confirmed 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.</td>
</tr>
<tr>
<td>Manual Confirmation</td>
<td>![Settings]</td>
<td>This status is when an project statement has been marked as Manual Confirmation</td>
</tr>
<tr>
<td>Manual Confirmation, JES Pending</td>
<td>![Settings]</td>
<td>This status is when an project statement has been marked as Manual Confirmation and an additional payroll transaction has been loaded to this project statement, which needs to be reviewed and posted to the statement</td>
</tr>
<tr>
<td>No Confirmation Required</td>
<td>![Parking Meter]</td>
<td>This status is when an project statement has been marked as No Confirmation Required</td>
</tr>
<tr>
<td>No Confirmation Required, JES Pending</td>
<td>![Parking Meter]</td>
<td>This status is when an project statement has been marked as No Certification Required and an additional payroll transaction has been loaded to this project statement, which needs to be reviewed and posted to the statement</td>
</tr>
<tr>
<td>Ready for Confirmation, Not Processed, Re-Opened</td>
<td>![Refresh]</td>
<td>This is the status of a project statement that has been re-opened, and statement needs to be re-confirmed by the individual</td>
</tr>
<tr>
<td>Ready for Confirmation, Re-Opened by Payroll Adjustment Reconciliation</td>
<td>![Refresh]</td>
<td>This is the status of a project statement where a payroll transaction was applied, and the statement needs to be re-confirmed by the individual due to changes in the payroll percentages on the project statement.</td>
</tr>
</tbody>
</table>