Effort Certification

Certification SOP

Summary

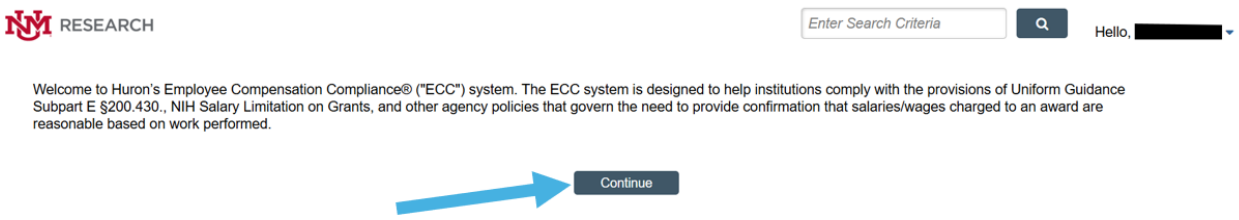
- Certification by fund rather than employee.
- Quarterly review and certification
    - Certification period will begin on the 15th of the month following the end of the calendar quarter.
    - There is a total of 60 days from the initiating date (pre-review=30 days) to final due date (certifier=30 days) for certification.
        - However, certifiers should receive an email and be able to complete certification the day after pre-review is completed.
- An **email notification** is sent once your designated Effort Coordinator has completed Pre-Reviewing all charges on your Project Statement. This email notification contains a **direct link** to the ECC system where you must certify the charges on any federally funded grants. Per UNM policy, in conjunction with Federal policy, **all statements** must be **certified** by the given end date.

Login Access

By using the following **direct link** you're automatically using Single Sign On

https://unm.huronecc.com/ecc/

Username = NetID



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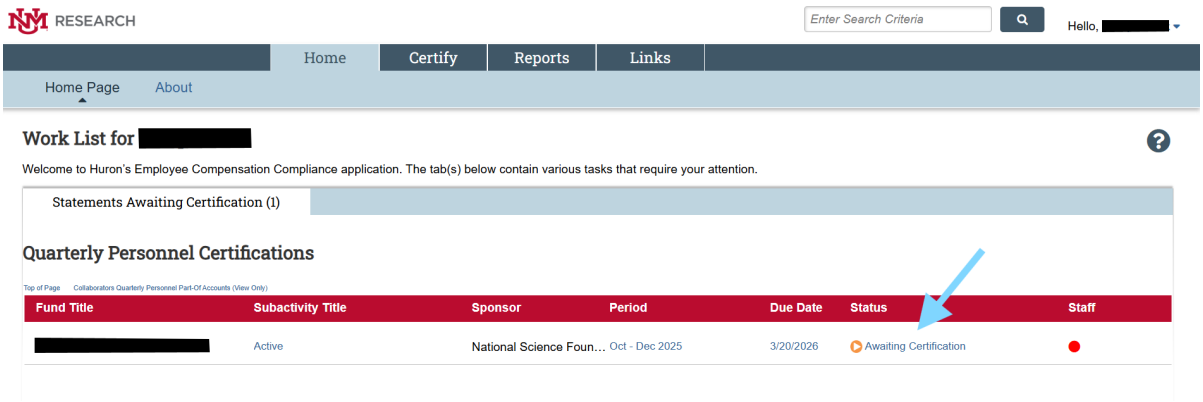
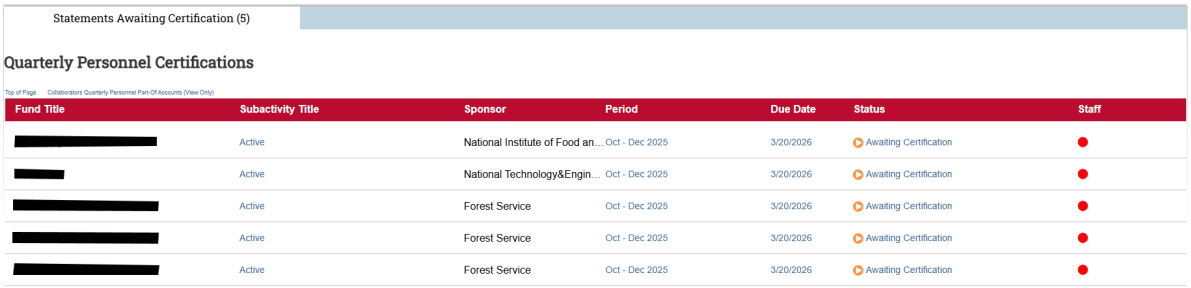
Worklist

All project statements appear on the worklist of your home page. Each statement status (on the right) links to the full statement.

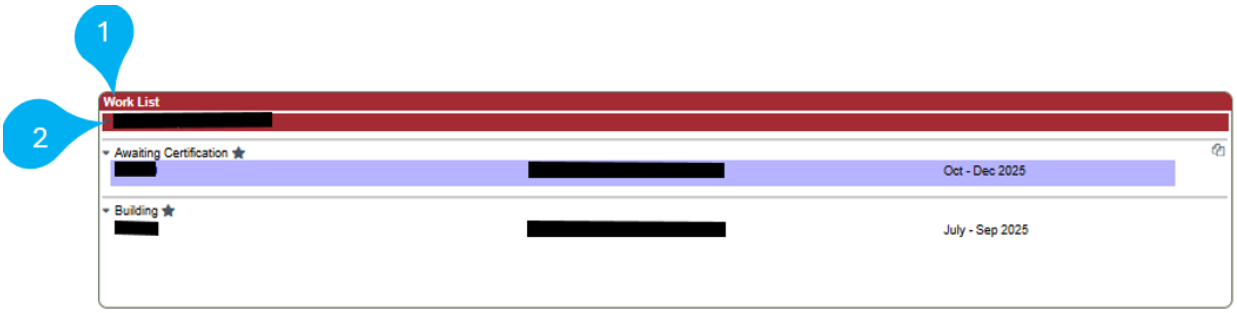


If you have multiples funds it will look as follows.



After you click on a statement you will find the following information on the screen (the next two screenshots).

Left side screenshot



1. Worklist: this will list the status of each fund associated with certifier.
2. Arrow down will expand the employees' information to show:
    a. Status: Ready for pre-review, pre-reviewed (after it has been pre-reviewed but waiting on overnight run), or awaiting certification.

b. Building: Statements that are in process and data are still being loaded. You can use this to review and if changes are needed, work with Effort Coordinator/Department Administrator to process a labor redistribution.

Right side screenshot

Additional functions:

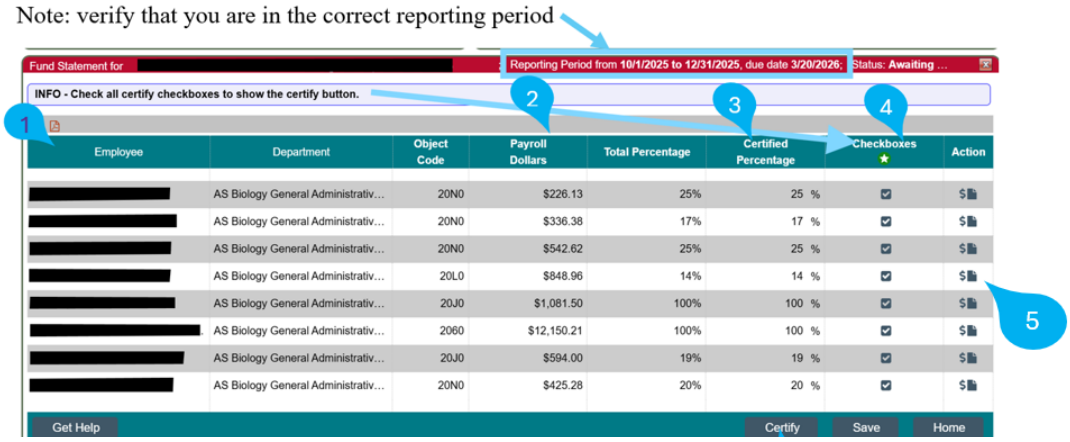
1. Newspaper : will provide reports available. You will click on each report individually and it will come up on a new screen.

   SPES Report
   Fund / Grant Summary

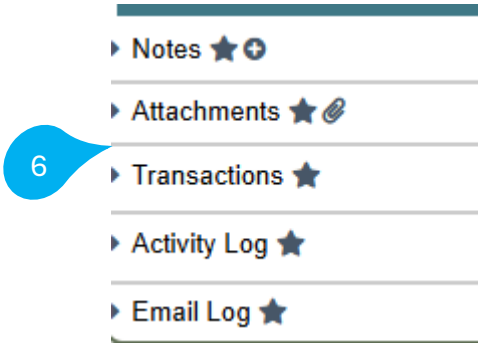
2. PDF : This will provide a paperform version, however, we will NO longer accept paper forms for certifications. They must be completed in the system. Use for reviewing purposes only.

Anatomy a Statement

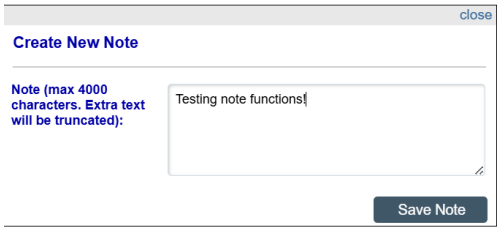
FYI – If any changes are needed to be made, please contact your Effort Coordinator/Department Administrator to process a labor redistribution in Banner.



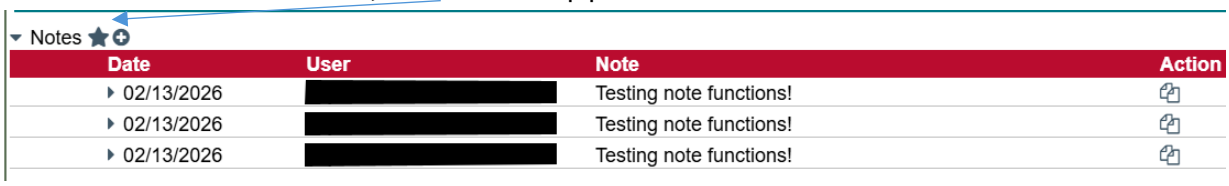
1. All users charging the fund during the period
2. The total dollars being charged for the period
3. The relative percentage of that user's total payroll on this project (100% means all their payroll for the period is on the project)
4. Checkboxes to select for certification. You can select the green star to auto-select all boxes.
5. Quick Reporting. Select the dollar sign to run a payroll report. Select the paper icon to view the full payroll distribution for a user. New window will open (must allow popups).
    a. The paper icon will show a payroll summary
    b. Separate quick guide available



6. Additional notes, attachments, and log sections. (if needed, make sure to do this before completing certification).
    a. Notes: you can add and copy notes (double paper under actions).

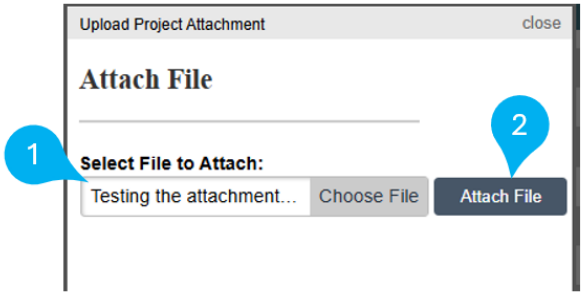


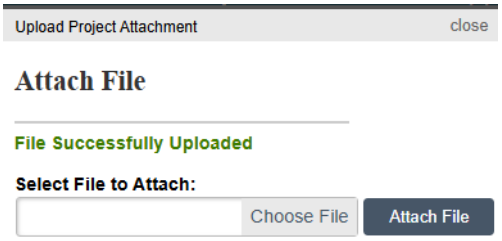
After notes are entered, a star will appear.



    b. Attachments (only PDFs): you will need to click on the paper clip to upload.

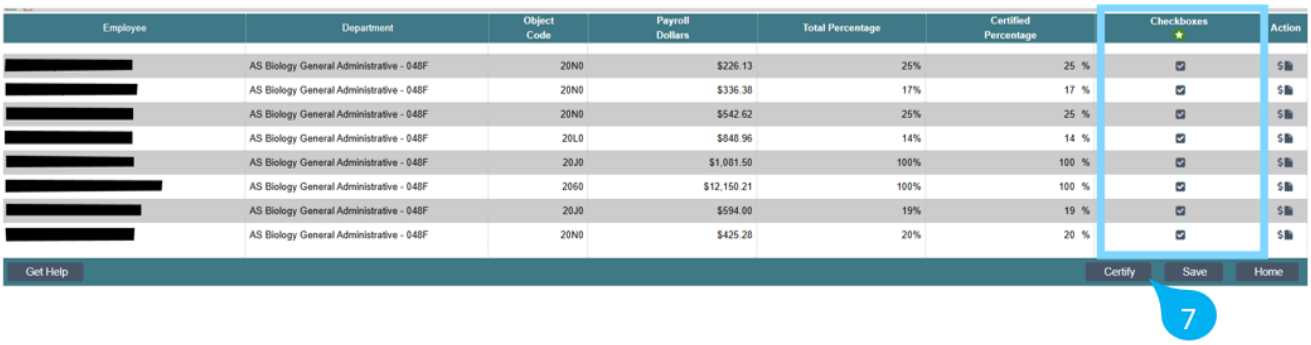
i. You will get a "File Successfully uploaded"



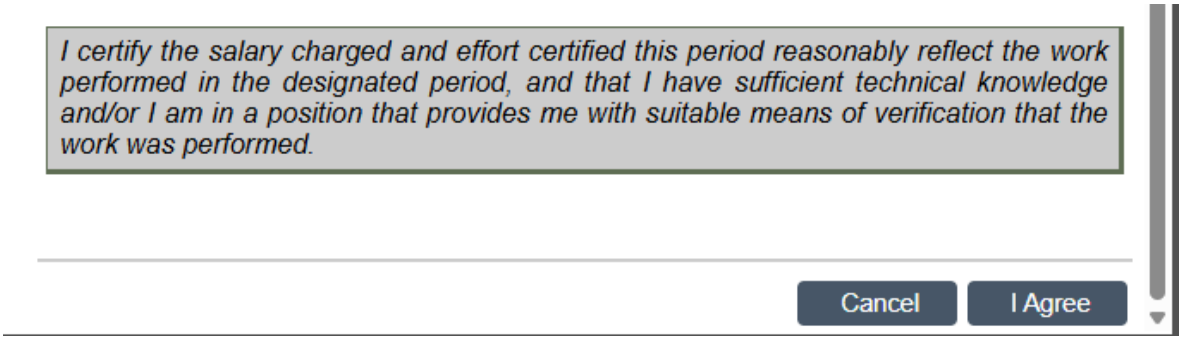


Action: allows you to download attachment.

c. Transactions (view only): lists all the statement updates
d. Activity Log (view only): List every time/everyone who has viewed or worked on the specific statement.
e. Email Log: outlines when emails were posted regarding the statement.



7. Select Certify to completely certify the statement! (The Certify button will not appear until all checkboxes are checked
8. An attestation statement appears once you select Certify. Select 'I agree' to confirm your certification.



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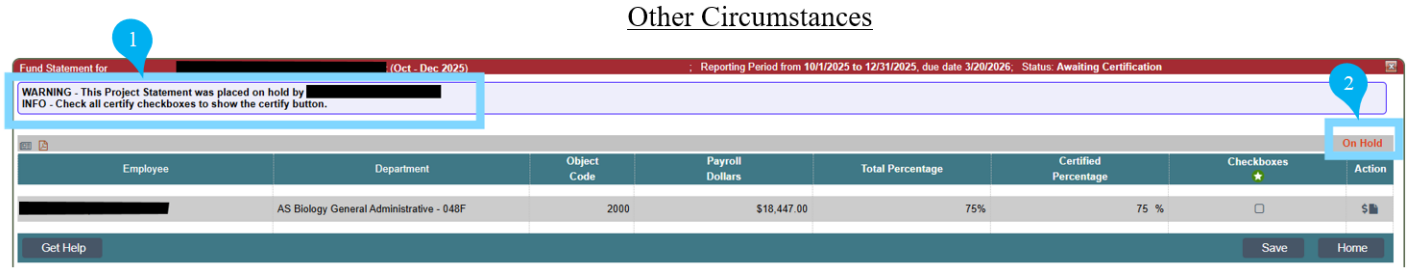
Other Circumstances



1. If you get the warning message, it is because the Effort Coordinator/Department Administrator has placed the project statement on hold for further review/research. You should have received an email notification regarding this action.
    a. Please reach out to the Effort Coordinator/Department Administrator to get this completed in a timely manner.

For any assistance or questions, please contact:

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