Effort Certification Demonstration

Research Administrators Forum

May 27, 2014

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Office of Financial Analysis
eCert Administrators
Current eCert Overview

• Old eCert portal in Scera has been shutdown
• New eCert System Rollout date is Jul 1, 2014 (Jan-Mar 2014 period)
• On going eCert Training Sessions Calendar (on OFA website)
• Effort training videos and materials on OFA website for users
• New eCert is more inline with new guidance and USC effort policy
EC Roles

• Preparer
  Responsible for preparing effort certification document (ECD) for the certifiers’ and Research Assistants (RAs) effort by reconciling payroll and populating %s and comments in the ECD. Also responsible for submitting any payroll expense transfers that may arise as a result of the certification.

• Certifier
  Responsible for certifying their own effort on sponsored projects or cost-sharing along with the effort of any RAs they are responsible for. This role may also include exempt staff (non-faculty) that certify their own effort.
EC Roles (continued)

• Reviewer

Responsible for monitoring effort certification, following up on delinquent certifications, assisting with the enforcement of the Effort Certification policy, and for assigning preparers to certifiers
What Has NOT Changed

• Email notification process
• Certification deadlines
• Workflow/Roles (Reviewers, Certifiers, Preparers)
• USC policy Web-based system
• Post-deadline account freezing process
Current System Cert. Periods.

- Q1 (Jan – Mar)
- Q2 (Apr – Jun)
- Q3 (July – Sep)
- Q4 (Oct – Dec)
- Fall Semester
- Spring Semester
- Summer Semester

New Effort Cert. System Cert. Periods (based on FY)

- Q1 (July – Sep)
- Q2 (Oct – Dec)
- Q3 (Jan – Mar)
- Q4 (Apr – Jun)
- S1
- S2
- S3
What *Has* Changed

- User interface
- Enhanced functionality
- KFS account level security access (KIM)
- Customized role-based dashboards
- All accounts will be displayed to align w/ new uniform guidance
- Data sharing with other USC systems (Workday/ KC and PET process)
eCert Enhancements

• New system integrations
  • Salary Caps (NIH,CIRM)
  • Payroll Expense Transfers
  • Cost Share (Companion Accounts)
  • Adding Account(s) to an ECD to reflect correct effort
• Certifiers able to certify multiple ECDs at once
• Delegating a Preparer (Reviewers & Certifiers)
• Delegate a Certifier (Reviewers & Certifiers)
• All Roles can resubmit an ECD during open period (Formerly “resetting” a certification)
Internet Browsers (use latest versions)

Internet Explorer (IE)  Safari
Effort Certification System Demonstration
Effort Certification
System Demonstration

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