Job Aid: Coordinator Pre-Review

Contents:

- Overview
- <u>Effort Statement Pre-Review (formerly FECs)</u>
- Project Statement Pre-Review (formerly GCCRs)

Overview:

"Pre-Review" is the main functional task coordinators need to complete in ECC (Employee Compensation Compliance). It is a process after an effort or project period has ended and before statements are ready to be certified where coordinators will review their assigned statements, and "Pre-Review" each statement if it is accurate. All Effort and Project statements must be "pre-reviewed" before they are available to be certified by the certifier. The pre review itself enables any individual statement to be moved to the "Ready for Certification" status. This is to reduce the likelihood that statements will be certified before they reflect pending changes or adjustments, in turn reducing the cases of recertification. See the effort report schedule for the expected start dates for effort and project pre-review periods: https://finance.uw.edu/pafc/ecc_schedule

This job aid references the "worklist" and the "assigned project statements" on the home page of ECC. For Project Statements specifically, these views are only available to "Primary" effort coordinators for a specific cost center. Those not designated as the Primary coordinators of departments ("Non-primary") will have to navigate through the "Department Dashboard" section to see the project statements under their assigned departments (refer to "Department Dashboard Overview" user guide: <u>https://finance.uw.edu/pafc/jobaids%26userguides</u>). All effort statements should appear on each coordinator's home page in the "Assigned Effort Statements" section.

For more info on primary vs. non-primary coordinators and how to optimize your departments' assignments, refer to the "Managing ECC Coordinator Assignments & Authorizations" job aid, also located on the job aids webpage: <u>https://finance.uw.edu/pafc/jobaids%26userguides</u>

Steps for Effort Statement Pre-review:

 <u>Go to ECC</u> and select your institution (select UW unless you are affiliated with APL or Harborview Medical Center - aka "UWM" institution in ECC), then click "Continue".

> Your login welcome text will be loaded when you select your institution from the dropdown list Institution: [Select Institution] •



- 2. On the "Home" page, select the "Assigned Effort Statements" subtab.
 - a. Here you will see your list of assigned certifiers that have a statement that is "Ready for Pre Review".
 - b. In the "Statement Owner" column, select the name of a certifier whose statement you want to pre-review.

WASHINGTON						Enter Search Criteria	٩	Hello, Test user
	Home Certify	Manage	Reports		Administration	Links		
Home Page About								
Work List								0
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Example Certifer 3	CC103223-CAS Physics - Academics	Jul - Dec 2023	04/05/2024	Base	Ready for Pre Rev	lew	•	
Example Certifer 4	CC103323-CAS Physics - Academics	Jul - Dec 2023	04/05/2024	Baaa	Ready for Pre	iew	•	
Example Certifer 5	CC103870-Dentistry Departments Non-Clinical Pedic	Jul - Dec 2023	04/05/2024	Base	Ready for Pre Rev	iew		

c. After clicking on a "Statement Owner" (or a "Status"), you will arrive at that worker's statement.

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d. There is another method of getting to statements that will enable you to go through multiple statements more efficiently. Go to the "Certify" menu tab and select "My Effort Statements"

UNIVERSITY of WASHINGTON						Enter Search	Criteria	٩	Hello, Test User
2	Home	Certify	Manage	Reports	Administration	Links			
My Effort Statements My Proje	ect Statements		-						
Work List									0
Velcome to Huron's Employee Compensation 0	Compliance application. The tab(s)	below contain various tasks that requir	re your attention.						
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e. This way you can switch between multiple different statements from the same screen. You will see this in your "Work List" (highlighted certifier represents which statement is currently being viewed):

Work List - Ready for Pre Review	🔁 🗙 🍸 Search	Q
Example Certifer 1 Q	CAS Physics - Academics	
Example Certifier 2 Q	CAS Physics - Academics	
Example Certifier 3 Q	CAS Physics - Academics	-
 Building 		
Pre Reviewed		
 Statements Requiring Certification 		
Recently Completed		

f. Compared to this from the first method of going to a single statement:

Work List			
 Statements Requiring Certification 	伯 🛧 🍸	Search	Q
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Building			
Ready for Pre Review			
Pre Reviewed			
Recently Completed			

- 3. Review the statement for an accurate reflection of the salary charges to each source during the period.
 - a. You can breakdown to period-by-period payroll and pay components by clicking the "\$" icon in the "Certified Effort" column in each row:

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Accounts	Payroll Dollars	Payroll Percentage	K Award / Funding Shift / Over Cap	K Award / Funding Shift / Over Cap %	Computed Effort	Certified Effort	Certify?
UW AWD- Number							-
GR Number	\$2,017.95	16.50 %	\$1,223.00	10.00 %	26.50 %	\$ 27 %	
Award Total:	\$2,017.95	16.50%	\$1,223.00	10.00%	26.50%	27%	

b. This opens a new browser window, and shows the period detail:

Parameters	Results											
Pay Period View Account View	<i>i</i>											
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Employee ID	First Name	Middle Init.	Last Name	Department	Department Number	Grant	Pay Period	Payroll	Pay %	Рау Туре	Employee Type	Statement Type
Example Certifier 1	Example	Certifier	1	CAS Physics - Academics	CC103323	Example Grant	03/01/2023 to 03/15/2023	\$2,017.95	16.50	REG	Effort Statements	Base
						Subtotal		\$2,017.95	16.50			
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Total Of All Certifie	15							\$2,017.95	16.50			
One item found.												
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c. You can see this level of detail for each salary source in one report by clicking the newspaper icon in the top left of the statement and selecting "Payroll Report".



Account view												
3 items found, displa	iying all items.											
Employee ID	First Name	Middle Init.	Last Name	Department	Department Number	Grant	Pay Period	Payroll	Pay %	Рау Туре	Employee Type	Statement Type
Example Certifier 1	Example	Certifier	1	CAS Physics - Academics	CC103323	CC103323 - CAS Physics - Academics	03/01/2023 to 03/15/2023	\$4,097.05	33.50	REG	Effort Statements	Base
							03/16/2023 to 03/31/2023	\$6,115.00	50.00	REG	Effort Statements	Base
						Subtotal		\$10,212.05	83.50			
						Example Grant Number	03/01/2023 to 03/15/2023	\$2,017.95	16.50	REG	Effort Statements	Base
						Subtotal		\$2,017.95	16.50			
	Certifier Total for Pe	eriod						\$12,230.00	100.00			
Total Of All Certifier	<u>s</u>							\$12,230.00	100.00			
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d. If changes need to be made to a statement, do not pre review the statement, refer to this webpage to facilitate for the necessary changes to be made: <u>https://finance.uw.edu/pafc/making_changes</u>

4. If the report is accurate to your knowledge, click on the "Pre-review" button located in the bottom right portion of the screen.

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Accounts	Payroll Dollars	Payroll Percentage	/ Over Cap	/ Over Cap %	Computed Effort	Certified Effort	Certify
W AWD- Number							
GR Number	\$2,017.95	16.50 %	\$1,223.00	10.00 %	26.50 %	\$ 27 %	
Award Total	\$2,017.95	16.50%	\$1,223.00	10.00%	26.50%	27%	
W Total:	\$2,017.95	16.50%	\$1,223.00	10.00%	26.50%	27%	
SP							
CC103323 CAS Physics - Academics	\$10.212.05	83.50 %	\$-1,223.00	-10.00 %	73.50 %	\$ 73 %	
SP Total:	\$10.212.05	83.50%	\$-1,223.00	-10.00%	73.50%	73%	
rand Total:	\$12,230.00	100.00%	\$0.00	0.00%	100.00%	100%	_
Get Help							Pre
Notes &							

5. The Effort statement should now be marked as "pre-reviewed".

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6. If you want to "undo" your pre-review, the "Reopen" button in place of where the "Pre Review" button was will return the statement to "Ready for Pre Review", meaning that it will have to be pre reviewed again. You may want to do this if you pre reviewed a statement that has pending PAAs that have not been loaded into ECC yet.

Steps for Project Statement Pre-review:

Note: Each grant has its own project statement that requires individual pre-review if there was staff payroll charged to it during the period

1. <u>Go to ECC</u> and select your institution (select UW unless you are affiliated with APL or Harborview Medical Center - aka "UWM" institution in ECC), then click "Continue".

Your login welcome text will be loaded when yo	u select your institution from the dropdown list.
Institution:	[Select Institution]
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Your login welcome text will be loaded when ye	ou select your institution from the dropdown list.
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Continue	Logout

- 2. On the "Home" page, select the "Assigned Project Statements" subtab.
 - a. Here you will see your list of assigned PIs that have statement(s) that are "Ready for Pre Review".
 - b. Select the PI's name or one of the links in the "Status" column to access a project statement.

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- c. There is another method of getting to statements that will enable you to go through project statements for multiple PIs more efficiently. Go to the "Certify" menu tab and select "My Project Statements" (this is only functional for primary coordinators). This will populate the upper left "Work list" box with all your assigned PIs, rather than just one that you select from the home page view.
- 3. One-by-one, review the statements for an accurate reflection of the salary charges to each grant for the period.
 - a. You can breakdown to period-by-period payroll and pay components for each worker by clicking the "\$" icon in the "Reports" column in each row:

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b. This opens a new browser window, and shows the period detail:

Employee ID	First Name	Middle Init.	Last Name	Department	Department Number	Grant	Pay Period	Payroll	Pay %	Pay Type	Employee Type	Statement Type	
X0000000X	Worker 1	Worker 1	Worker 1	Example Dept	00000000	GR000001	7/1/2023 to 7/15/2023	\$2,125.00	37.50	REG	Project Statements	Base	
							7/16/2023 to 7/31/2023	\$2,125.00	37.50	REG	Project Statements	Base	
						Subtotal		\$4.250.00	75.00				
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Total Of All Certifie	ers							\$4.250.00	75.00				
2 items found, disp	laying all items.												
											RExcel F	RKML DPDF	

- c. The icon that looks like a piece of paper with a folded corner runs a report to show all the payroll for that specific worker to all the sources they had salary charged to during the period.
- d. If changes need to be made to a project statement, PAAs must be completed in Workday (<u>UW Connect Resources on PAAs</u>). The PAAs will be reflected in ECC the Monday after they post in Workday (the following Wednesday for APL)
- 4. If a project report is accurate to your knowledge, click on the "Pre-review" button located in the bottom right portion of the screen.

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5. The screen may change to the next Project statement that needs to be pre reviewed for a given PI, but the Project statement for the first grant should now be marked as "pre-reviewed". This can be checked in the "Pre Review" section in

the upper left "Work list" to navigate back to the previous statement if your screen changed.

6. If you want to "undo" your pre-review, the "Reopen" button in place of where the "Pre Review" button was will return the statement to "Ready for Pre Review", meaning that it will have to be pre reviewed again. You may want to do this if you pre reviewed a statement that has pending PAAs that have not been loaded into ECC yet.