COLUMBIA UNIVERSITY
IN THE CITY OF NEW YORK

How can I determine who needs to be certified in my department(s)?	1. "Associated Certifiers" tab on the homepage lists all effort cards that are currently 'not certified'
	2. Reports
	    • "Status by Certifier" lists all effort cards requiring certification during the current certification period, each individuals role and card status for every department/division you are assigned as an effort coordinator
	3. Department Dashboard
	    • Sponsored section under "Covered Individuals" on the "People" tab lists all effort cards requiring certification for the current certification period, for the department/division selected

How can I view the details of each of the effort cards in my department(s)?	• "Certifier Detail Report" breaks out each effort card on the "Status by Certifier" report by line item which aids in determining who is responsible for certifying non-self certifier effort cards
	• To access an effort card:
	    a. Click on the name, due date or period of performance from active certifier list
	    b. Click on the status icon from department dashboard
	    c. Use the "Lookup" function on the manage section of the blue navigation bar. Type the last name of the individuals for whom you would like to review their effort card and select "go"
	        • To see salary details (Primary Effort Coordinator Only) you can toggle between % and $ view
	        • Select Reports icon above the accounts-cost share or payroll report

How can I assist self certifiers and PI's in my department with certifying?	1. "Lookup" from Manage section o Type in the self certifier or PI's last name or emplid. When ECRT matches your selection criteria, click submit. This will give you a snapshot of their effort screen where you can walk them through their questions and certification 2. Follow reference guide on "How to certify my effort" and "How to certify my effort and the effort of my researchers."
What happens after self certifiers and PI's certify the effort cards?	• They are routed to the primary effort coordinator for processing. Processing (reviewing for cost transfers) finalizes the effort certification process for that card.

Where can I find cards that need to be processed?	• Effort Tasks tab on home page (Primary Effort Coordinators only).
	    o Click on the effort card to review. Review cost transfer columns to determine if there are any required cost transfers. Our threshold for cost transfers is $1,000 and 1% to be removed from a sponsored account.
	        ▪ Selecting "Cancel," will take you back to your task list
	        ▪ Selecting "Process" will finalize card
	        ▪ Selecting "Do Not Process" re-opens the effort card and the card will need to be re-certified

What happens if there are effort cards requiring certification but the employee or PI responsible for certifying is no longer here?	• Follow reference guide on "Certifying for Individuals who have left the University."
What happens if a PI/Self Certifier certifies incorrectly?	• Certifiers should make every effort to review information before certifying. If any error is discovered during processing of an effort card, the card can be recertified. No re-certifications will be permitted once the certification period ends.