Tips and Tricks for Successful Completion of Confirmation Process

Pre Review Specific

- Use a "Master Source Document". The master source document should be set up prior to the Fall and Spring semesters and has a record of where each faculty, staff and student will charge, their pay amount and the percentage effort and time period in which they will charge a particular account. Each department and the PI's within each department can provide the data for this Master Source Document.
- Payroll reconciler confirms payroll charge. A staff member reconciles actual payroll charges to the master spreadsheet each month. This should be someone not responsible for payroll entry.
- Having a Master Source Document means that when completing the pre-review the master spreadsheets can be reviewed and ensure the accuracy of the charges. A review of the payroll detail in the eCRT system or a quick BW report of the appropriate account and time frame also help to confirm accuracy.

PI Review and Confirmation

- Emails are distributed to the PI when statements are in Ready for Confirmation status.
- Check regularly to see who has not completed the confirmation process. When reminder emails are distributed, contact faculty members with a personal email to remind them of the due date and offer assistance if needed. Attach a copy of the PI User guide from the RFS website.
- Offer assistance if they received a second reminder email-either in person or over the phone. Assure them that the process is rather quick.
- Get your College Effort Coordinator involved if the PIs are not completing the process, as they have an opportunity to escalate.