Reviewing the Total Professional Effort (TPE) Report

To access TPE Reports:

Note: The following reports have been created to monitor the activity in the annual reporting of TPE. It is essential that these reports be run so that all Faculty complete the effort reporting in a timely manner and allow Effort Coordinators time to make corrections to the effort and/or hours as needed.

The TPE Report is an alternate way to view the TPE Statement for Faculty. The report allows the Effort Coordinator to view the Faculty’s TPE Statement without first reviewing the Faculty’s standard Effort Statement(s), or to review TPE data for multiple Faculty in one report.

Note: As a reminder, the options listed are based on your security roles assigned in ECRT as an Effort Coordinator. Therefore, only the options available for the roles assigned will display. These options are not available to the Certifier.

1. To access reports, select the Reports page. On the Reports page, select Total Professional Effort in the Category Section.
Reviewing the TPE Report (cont.)

2. Available reports are listed in the **Reports** column. Descriptions of each report display in the **Description** column. Please review the descriptions for the following reports:

- Faculty Missing TPE*
- Faculty with TPE – Effort Certification not Required Clinical Activity Hours Validation Yearly*

**Note:** This report is helpful in managing TPE for Clinical Faculty who have effort on non-sponsored research. Effort Coordinators must pre-populate TPE no later than July 31 before the statement is auto-processed.

**Note:** TPE cannot be modified on a statement that has been auto-processed so Effort Coordinators must main the statement prior to the end of the pre-review period.

- TPE Report

**Note:** Detailed instructions are listed below for reports highlighted by the asterisk.

**Note:** The additional reports in the Total Professional Effort category are executed by entering Org Code in the Enter Department field and the start of the fiscal year of interest and the reports display as a list which includes employee and department information.
3. On the **Reports** page, choose the **TPE Report** from the **Total Professional Effort** Category.

4. Enter data to execute the report. Hovering over the information icon provides details about the data required for each field.

5. After data is entered, select **Run Report**.
Reviewing the TPE Report (cont.)

6. **Review the results** that ECRT displays based on the criteria selected in the steps above.

7. **Select the column heading** to sort the results by that column if desired.

8. Select the **Certifier’s name (highlighted in blue)** to view the Total Professional Effort statement for that person.

9. If desired, use the buttons at the bottom of the screen to export the data to **Excel, XML, PDF, or RTF files**.

10. To exit the report, select a different report from the top of the page, select a different ECRT page to visit, or **Sign Out**.