

E	RS	
User ID		Announcements
Password		Welcome to Effort Reporting System!
	Login	
Need Help?		

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1.Brand New Look

Version 10 of the Effort Reporting System (ERS) has a completely new look including the logo, color scheme, style etc. Some of the features have been re-designed for better usability. The subsequent sections provide additional information on the updated look and design including screen shots, where applicable.

2.Login Page



E	RS	
User ID		Announcements
Password		Welcome to Effort Reporting System!
	Login	
Need Help?		

ERS Login Page

- The Announcements section was titled Message Board in the previous versions.
- The Help desk information is provided under *Need Help?* link.



3.Menu Options and Links



ERS Functions available to the role of Department Coordinator

- The user's name, role and domain i.e. *View Assigned Departments* link are displayed at the top right of the screen.
- All applicable ERS functions are available at the top menu.
- The top menu bar is always available for the user while in ERS.
- The menu options are condensed and re-organized by function.

Effort Forms - Certify, Certify by Projects

Reports - link to all applicable reports for the assigned role

Help

4.Home Page

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-	Search Employee Effort Forms	-		My Status / To Do			
	Employee O Account				Current	Prior(s)	
	Search		Project	Pending	0	3	
			Certification	Pending Pre Review	0	0	
			Individual	Pending	0	0	
			Certification	Pending Pre Review	2	14	
	ERS provided by	MAXIMUS Inc.					

5. Certification Workflow

The Certify effort form layout is consistent with Pre Review effort form in terms of usability -switching between Commitment and Planned view, expand or collapse sections, add account etc. The Certifier has the option to *View Pre Review Details* also.

Effort Reporting System Version 10.2

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	Effort Forms 🧕	🖊 🔻 Reports 🛄	Help 🕐 👻			Smith,John Certifier
		Certify				
Name	e: Mary Jane Jones	Employee ID: 99999	999 VC/VP. Research & Int Pro	Title:	Research Staff	
3001	Dept. Hou to - HEALTH Research Institute					G G D
	Reportin	9 Period: FY21_Q3 (03-01-	2021 through 05-31-202	:1)		
Acco	ounts	Description	Payroll %	Cost Sharing %	Total %	Certified Effort %
-		Sponsored Acc	counts			
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Add Account Notes	ĥ	Exit Reset Notify Sav	ve Proceed			

Certify Effort Form

Proceed presents the following page to the Certifier with an option to Certify.



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State	Effort Forms	🖌 • Reports 🛄 Help 🚺	0 -		Pc
		Certify			
	Name: Codae,Kathy 👁 Sub Dept: 61570 - Infectious Disease	Employee ID: 711032222 Division: SC - Immunology	Title: Research Associate Title Code: 01		
	Reporting Perio	d: 123114 (07-01-2014 through 12-	31-2014)		<u>d</u> @ @ =
Acc	counts Description	Payroll %	Cost Sharing %	Total %	Certified Effort %
-		Sponsored Accounts			
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	Sponsored Subtotal	52%	5%	57%	60%
-		Non-Sponsored Accounts			1
61570 57650	THE AUBREY	46%	-5%	43%	40%
	Non-Sponsored Subtotal	48%	-5%	43%	40%
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		Exit Make Changes Notify			

Certify Effort Form Page with Certify option

Note: If there are any errors/ warnings OR system is configured to display the Certifier's Checklist, it will present those items prior to displaying the Certify page.

Clicking on completes Certification of the effort form and the following screen is presented. Prior to the screen, a pop-up window will remind you of the things to check.

	Have you reviewed these items?
Info on ERS	
Effort Reporting Pol	2 <u>Y</u> .
Sponsored Program	<u>\$</u>
Remember Cost Sh	ring
Are all grants listed?	
Did you report a cha	nge in effort?

Close Window

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			Certify			
	Name: Mary Jane Sub Dept: H0010	Jones - HEALTH Research Institute	Employee ID: 9999999 Division: H0400 - VC/VP, Research & Int P	Title: Re rop Mgt Title Cod	esearch Staff de: 4000	
			Certification Complete Smith,John on 06-02-2023			
		Reporting Pe	riod: FY21 Q3 (03-01-2021 through 05-31-20)21)		d d 🖶 🖄
	Accounts	Descripti	on Payroll %	Cost Sharing %	Total %	Certified Effort %
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<u>oc</u>	0730-5013-H0010-B0001-G0505858 (67371)	Community Engagement	<u>100%</u>	0%	100%	100 %
		Sponsored Subtotal	100%	0%	100%	100%
	Grand	I Total	<u>100%</u>	0%	100%	100%
Notes N/A	I confirm t period or in I understand	hat the distribution of activity rep the event that I am reviewing eff that falsification of effort stateme	oresents a reasonable estimate of all work perf rt for someone other than myself, that I have S review on behalf of this employee. ents may result in potential disallowed costs, p federal False Claims Act.	ormed by me during the s Suitable Means of Verificat	tated lion, to ader the	

Certified Effort Form

The *Effort Form* status box indicates the effort form status and Certifier's name. If the effort form was updated by the Certifier it will also indicate the email notification including the Post Reviewer's name and email address.

6. Form Selection Screen

The effort form selection screen is redesigned for better usability and consistency of data elements availability when accessed either via My Status/ To Do or Effort Forms (*Pre Review*, *Certify*, *Post Review*) menu options.

		Title 🗢	Sub Department	Sub Department Name	Form Status 🗢	Pre Reviewed By 🗢	Certified By	♦ Post Reviewed By ♦	RCT ¢	Assigned Certifier 4
4II] -			[All]		[All]				[All 💌	
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I.	Ruan,Student	Research Associate	61390	Internal Medicine	Pending Certification					Codae,Doyle
:=	Barnett,LN	Research Asst	61570	Infectious Disease	Post Reviewed	Miller, Cris	Codae,Doyle	Miller,Cris		Codae,Doyle
	Maximus,Demo61570	P1	61570	Infectious Disease	Pending Pre Review					Multiple ①
	Megidish,Tammy	Research Fellow	54240	Emergency Medicine	Pending Pre Review					Multiple ①
	Moore,Mark	Member	54240	Emergency Medicine	Pending Pre Review					Multiple ①
	Paris,Frank	Research Fellow	61390	Internal Medicine	Pending Pre Review					Multiple ①
	Reilley, Jill	Research Asst	61390	Internal Medicine	Pending Pre Review					Codae, Doyle

Effort form selection page for Certifier accessed via menu option.

The new interface allows to -

- Sort on all columns
- Filter on the following columns
 - Certify*
 - Sub Department
 - Sub Department Name
 - Form Status
 - o RCT

* The column name will vary depending if effort form selection screen was accessed in Pre Review, Certify or Post Review.

- View the actual Reviewer information i.e. *Pre Reviewed By, Certified By, Post Reviewed By* depending on the *Form Status*.
- The Edit Form is or View Form is option will be available based on Form Status.

7. Bulk Certification

This feature allows certifiers to certify multiple effort forms at a time. Only basic effort forms are eligible for bulk certification. The following is the workflow to complete the certification in bulk.

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Dis	playing 2	of 2 records	Title	• Sub Detailment	Sub Department	Form Staturs e	Pre Reviewed By a	Certified Dy	s Post Reviewed By a	RCT •	Assigned Certifier e	
	(A)[]			[A]] •	Contraction of the second	[A]]		-		[A]I •		
		Codae Kathy	Research Associate	61570	Infectious Disease	Pending Certification	Miller, Cris				Power, Max	
		Dawar Mary	PI	35208	Surgery.	Pending Certification	Miller, Cris				Power, Max	

From the Certify Effort Form Selection screen, click on Certify Multiple Forms

Bulk Certification – Select Certify Multiple Form to certify more than effort form at a time.

• The effort forms listed will be available for selection and the Certify Single Form option will be available to revert to Certify one effort form at a time. Select the forms and click Proceed

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Bulk Certification – Select effort forms for bulk certification

• Proceed will present following page to the Certifier, listing the effort forms selected for bulk certification.

Commitment ¹³	Accounts Sponsored Accounts 61572-53892	Effort Forms Reports Bulk Certificat Codse,Kathy (7110022222) - Res Reporting Period: 123114 (07-01-20) Description	Help (2)	•		Sm
Commitment ⁽³⁾	Accounts Sponsored Accounts 61572-5399	Codas, Kathy (711032222) - Ree Reporting Period: 123114 (07-01-20 Description	on harch Associate 4 through 12-31-2014) Pavroll 5			<mark>و لا دی</mark> ان او او او
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Commitment ¹³	Accounts Sponsored Accounts 61570-52590	Codae,Kathy (711032222) - Rex Reporting Period: 123114 (07-01-20 Description	arch Associate 4 through 12-31-2014) Payroll 5			
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45%	<u>81570-63690</u>					
		BONE MARRO	52%	5%	57%	57 %
		Sponsored Sub	otal 52%	5%	57%	57%
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1		. Priver \$4.5 (1675657	41 , Bi			(0 of 2 forms reviewed)
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Commitment ⁽⁾	Accounts Sponsored Accounts 200 45320 149569 300211 0101 65032 203 45320 149569 300237 0001 65803	Power, Max (2679922 Reporting Period: 123114 (07-01-20 Description 2 Description N/A 2 Description N/A	2) - P(through 12-31-2014) Payroll % 51% 11%	Cost Sharing % 0%	Total % 51% 11%	(0 of 2 forms reviewed)
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Bulk Certification - List of selected effort forms

- *a.* Employee details (*Name, ID, Title*) including the Reporting Period Code is listed on the header of each effort form.
- b. Option to View the Pre Review Details (()) or View Previously Certified Forms () for the selected individual form.
- c. Print (+)the form as seen on the page or generate PDF ()download of the selected page.
- d. The Certifier needs to select the check box next to each form to confirm the review of

the effort form. If not selected the effort form will not be included for the bulk certification.

- Click Proceed to go to the next step of Certification.
 - If any of the selected reviewed effort forms has any issues, ERS will give an option to correct or continue depending on the nature of the issue.
 - If ERS is configured to review the Certifier Check list, it will display before presenting the following screen with the Certify option.

Effort Reporting System Version 10.2

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Bulk Certification - List of selected effort forms

certify completes Certification of the selected forms and displays the following Click on screen.

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-	Codae,Kathy (711032222) - Reporting Period: 123114 (07-0	Research Associate 1-2014 through 12-31-3	2014)		
Accounts	Description	Payroll %	Cost Sharing %	Total %	Certified Effort %
Sponsored Accounts					
61570-63699	BONE MARRO	52%	5%	57%	57 %
	Sponsored Subtotal	52%	5%	57%	57%
Non-Sponsored Accounts		1000			
61570-57650	THE AUBREY	4925	-5%	43%	43.%
	Non-Spontored Subtotal	485	-5%	435	43%
	Grand Ioan	1000		100 8	1105
	b Form Certified by Power, I	dax on 07 07 2017			A A
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Bulk Certification – List of Certified effort forms

- a. The status is displayed in the Effort Form Status box. If any of the effort form(s) was updated or Notes were added, an email notification message will also display.
- b. The Certifier's name and date when certification was completed is displayed at the

top of each selected effort form.

c. Make Changes provides an option to correct or re-certify if needed.

8. Project Certification

This new configurable feature of Project Certification allows institutions to certify effort for individuals on any given project (note, PI data and other information will be required to use this feature). For those institutions already using PI Line Item feature, Project Certification can be used instead, without any additional data.

If configured, this option is accessible to the assigned Certifier via *My Status/ To Do > Project Certification*

My Status / To Do							
		Current	Prior(s)				
Project	Pending	<u>3</u>	<u>5</u>				
Certification	Pending Pre Review	1	Z				

Project Certification – My Status/ To Do

or, Effort Forms menu option of Certify by Project



Project Certification – menu option

• Upon selection of this option the Certifier is presented with his or her list of active Projects.

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	61390-63690	GENE PROJ	123114	01/01/2003	12/30/2015	6	2	2	0	
	61570-63690	BONE MARRO	123114	01/01/2005	12/30/2015	6	1	1	0	
	61570-67930	CANCER GENE	123114	01/01/2005	12/30/2014	2	1	1	0	

Project Certification – List of Projects

This list provides a status overview of the Project:

- o Total Employees on Project
- Number of Employees to Certify
- Employees Pending Certification
- Certified Employees
- Select edit icon 💷 to Certify effort of all Employees on this Project.

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				Projec	t Certification	n				>
		<i>[2</i>]	R	aporting Period: 12	3114 (07-01-2014 through	12-31-2014)				
			Project ID: <u>61390-63690</u> Child Account ID: 61390-63690	Project B Project E	egin Date: 01-01-2003 nd Date: 12-30-2015	Project De	scription: GE	NE PROJ		
-				Emplo	yees Charging Projec	1				
	Employee ID	 Employee Name 	Job Role 🕴 🗸	Appointment	Commitment	Payroll %	Effort %	Notes	Status	· 0
	167982222	Codae,Doyle	Pl	12.0	14%	17%	20 %		Pending Individual Certification	on
	167984444	Maximus Demo51570	CP	12.0	20%	215	21%		Available for Certification	
	470462222	Manua Mark	OT	0.0	0%	10096	100.96		Pending Individual Certification	on
	TIDAOZZEZ	moore,mark				100 20	100.10			
	312012222	Megidish,Tammy	от	0.0	0%	100%	100 %		Pending Individual Certification	pn
	312012222 756572222	Megidish Tammy Paris Frank	от от	0.0	0% 0%	100%	100 %		Pending Individual Certificati Pending Individual Certificati	on

Project Certification - List of Employees Charging Project

The Employee information like, ID, Name, Job Role, Appointment, Commitment, Payroll%,

Effort % including Status of the form is displayed.

The *Employee Name* also serves as a link to view the 100% of the effort form *only* if the Certifier is the assigned Certifier.

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	-		Certify				
		Name: Maximus Demo61570 Ø Sub Dept: 61570 - Infectious Disease	Employee ID: 1679844 Division: SC - Immuno	44 Title: logy Title (P1 lode: 01		
		Reporting Period: 1231	14 (07-01-2014 through	12-31-2014)			G (2) 🖨
Commitment ©	Accounts	Description	Payroll %	Cost Sharing %	Total %	Certified Effort %	Status
-	55010.75230	Spo MOLECIE AR STUDY	insored Accounts	175	5%	15	Pending Certification by Munn Kallul 1
20%	61390-63690	GENE PROJ	21%	0%	21%	21%	* Available for Certification
20%	61570-63690	BONE MARRO	21%	0%	21%	21%	* Available for Certification
		Sponsored Subtotal	48%	0%	48%	48%	
-		Non-5	ponsored Accounts				
	21150-2332	CELLULAR I	5%	0%	5%	5%	
	61390-05160	MED GENERA	47%	0%	47%	47%	
		Non-Sponsored Subtotal	525	0%	52%	52%	
		Grand Total	1005	0%	100%	100%	
Notes			58				

Project Certification - Effort Form of Maximus, Demo

In this case the link for *Payroll %* is also available to view the payroll information of the respective Project on the effort form.

					Reporting Peri	iod: 123114	(07/01/2014 through	12/31/2014)			
			Name: N	faximus,Demo615	70	Emp	loyee ID: 167984444	Title: P1			
			Sub Dep	4: 61570 - Infection	is Disease	Divis	ion: SC - Immunolog	y Title Co	de: 01		
				Chang	e to 61390-636	90(Sponsor	ed) - (ba	Details By Month			
Project	Fund	Dept Id	Begin Date	End Date	Account	Appt	Pre Amount	Payroll Amt	Non-Effort Payroll	Effort Payroll	Effort Payroll %
	63600	61390	09/30/2014	12/29/2014	1100	12	2271.1	\$2,271.10	\$0.00	\$2,271.10	
51390-63690	03030				1500	12	2271 1	\$2 271 10	\$0.00	\$3 321 10	
61390-63690 61390-63690	63690	61390	09/30/2014	12/29/2014	1100		E.E. 1 1. 1		20.00	26,211.10	
61390-63690 61390-63690 61390-63690	63690 63690	61390 61390	09/30/2014 09/30/2014	12/29/2014	1100	12	2271.1	\$2,271.10	\$0.00	\$2,271.10	
61390-63690 61390-63690 61390-63690 61390-63690	63690 63690 63690	61390 61390 61390	09/30/2014 09/30/2014 09/30/2014	12/29/2014 12/29/2014 12/29/2014	1100	12	2271.1	\$2,271.10 \$2,271.10	\$0.00 \$0.00	\$2,271.10 \$2,271.10 \$2,271.10	
61390-63690 61390-63690 61390-63690 61390-63690 61390-63690	63690 63690 63690 63690	61390 61390 61390 61390	09/30/2014 09/30/2014 09/30/2014 09/30/2014	12/29/2014 12/29/2014 12/29/2014 12/29/2014	1100 1100 1100	12 12 12	2271.1 2271.1 2271.1	\$2,271.10 \$2,271.10 \$2,271.10	\$0.00 \$0.00 \$0.00 \$0.00	\$2,271.10 \$2,271.10 \$2,271.10 \$2,271.10	
61390-63690 61390-63690 61390-63690 61390-63690 61390-63690 61390-63690	63690 63690 63690 63690 63690 63690	61390 61390 61390 61390 61390	09/30/2014 09/30/2014 09/30/2014 09/30/2014 09/30/2014	12/29/2014 12/29/2014 12/29/2014 12/29/2014 12/29/2014	1100 1100 1100 1100	12 12 12 12	2271.1 2271.1 2271.1 2271.1 2271.1	\$2,271.10 \$2,271.10 \$2,271.10 \$2,271.10 \$2,271.10	\$0.00 \$0.00 \$0.00 \$0.00 \$0.00	\$2,271.10 \$2,271.10 \$2,271.10 \$2,271.10 \$2,271.10	

Project Certification - Payroll Information of Maximus, Demo

The *Effort* % is open for editing if the effort form is available for Certification. If the effort form status is *Pending Pre Review* or *Post Reviewed*, the *Effort* % is not editable. If an employee's effort form is not subject to Project Certification, the Status will display *Pending Individual Certification* and will not have the ability to view the effort form or payroll information.

The Certifier also has an option to add Notes on the effort form for which the Project is being certified by clicking button.



Project Certification - Add Note on Employee's Effort Form

• The Proceed brings the Certifier to the Certify page listing only the Employee Names associated with projects that are available for Certification.

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	3		Project Certification	n			>
	·	Reportin	g Period: 123114 (07-01-2014 throug	h 12-31-2014)			
	Project Child A	ID: <u>61390-63690</u> ccount ID: 61390-63690	Project Begin Date: 01-01-2003 Project End Date: 12-30-2015	Project De	scription: GENE PROJ		
							RA
			Employees Charging Proje	et			- <u>-</u>
Employee ID	* Employee Name	Job Role Appoint	ment Commitment	Payroll %	Effort % Notes	Statu	
167984444	Maximus Demo61570	CP 12.0	0 20%	21%	21%	Available for Certification	
800101040	Munn, Kelly41	OT 0.0	0%	100%	100%	Certified	
	PI Line Iten during the sta Ver	ITEST. I confirm that the distri led period or in the event that fication, as indicated in the no that falsification of effort states	bution of activity represents a rea I am certilying effort for someone tes section on the previous screer ments may result in potential disa	tonable estimate of a other than myself, th , to certify on behalf lowed costs, penalti	all work performed by m sat I have Suitable Mean of this employee. es and/or actions under t	e a of the	
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Project Certification - Certify Project

Note: If ERS is configured to display Certifier Checklist, it will present the screen with checklist information prior to the Certify screen.

• The action of <u>Certify</u> completes Certification and provides an option to <u>Make Changes</u>, if needed.

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Employee ID	* Employee Name	Job Role	Appointment	Commitment	Payroll %	Effort % No	tes	Status
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Project Certification – Certification of Project Completed

The option to print a copy of the form 🖨 or download to a pdf 🖾 format is available throughout the Project Certification workflow.

If any of the effort on the project was updated, Post Review will be required and will follow the same process as is currently used for Line Item Certification, if necessary.