JOB AID

ERS Multiple PI Certification

This Job Aid provides useful information to assist the user in enabling the Multiple Certification process in ERS. You will learn how to activate and deactivate the multiple certification function on an Effort Report

This Job Aid covers the following:

Why Multiple Certification is Required

Effort Reports can be certified by the individual (self-certified) or by a supervisor or someone who has first hand knowledge of the work performed and the benefiting project.

When an Effort Report contains multiple projects where each is owned by a different PI, that report also appears on other PIs' My Projects lists. Effort Reports like this may require certifications by multiple PIs if no single PI has first hand knowledge of ALL the work performed by the individual.

- ☐ERS has a Multiple Certification feature that allows each sponsored project line of an Effort Report to be certified individually. Either the Reviewer or the PI can activate this feature

- ☐If an Effort Report has the Multiple Certification feature activated AND at least one of the lines is already certified by another PI, do not deactivate Multiple Certifications as this will eliminate the certifications already captured for that Effort Report.

When an Effort Report contains multiple projects owned by PIs in different **departments**, the Effort Report Coordinators in each department should coordinate with each other to ensure that certification is completed.

ERS Multiple Certification Functionality

Usually the department administrators will activate the multiple certification functionality when reviewing the effort reports prior to notifying the PIs that reports are ready for certification. PIs are also able to activate this feature.

To activate multiple certification: In the Report Options section, check the box for "Report requires multiple certifications." When the option is enabled, a new column will be added on the right allowing each Sponsored Project line to be selected and certified individually.

1. **Report Option** - Multiple certification enabled by selecting the option.

2. **Line Certified** - Column appears when the option is enabled.

ERS Multiple Certification Functionality (cont.)

When you check the box for multiple certifications, you will receive a pop-up box asking you to confirm your request for multiple certification.

Click **OK** to confirm, or **Cancel** to take you back to the original effort report.

When you encounter an Effort Report with a "Line Certified" column on the right and click boxes on each Sponsored Project line, ERS requires that each effort line on the report be certified individually.

To deactivate multiple certification, click on the check box adjacent to "Report requires multiple certification." A pop-up window will open prompting you to confirm your request to stop requiring multiple certifications. Click **OK** to confirm. Click **Cancel** to cancel the request.

If the multiple certification option is deactivated AFTER one or more line certifications have taken place, those lines will now be uncertified.

Line Certification Process

To certify an Effort Report with line certification:

- Review effort reported
- Adjust any incomplete or incorrect effort in the Adjusted Payroll % and or Adjusted Cost Share % fields.
- **If you make changes to the effort report data, click "Update Calculation"**

1. **Line Certified** - Check the **"Line Certified"** box for each of your projects and click the **"Save"** button to save the updated report.

2. **Update Calculation** - Always select the **"Update Calculation"** button after making changes to the effort report.

3. **Line Certified Alert -** The report will remain open until all lines on the report are certified.

Line Certification (cont'd)

When a line has been certified, ERS generates a message below the project that identifies who certified the effort and the date it was certified. A check mark will appear in the check box in the Line Certified column when the line has been certified.

Since the Effort Report is not considered certified until ALL lines are certified, it is possible to continue to make changes to the report. It is also possible to "uncertify" individual lines which had previously been certified. Clicking on the Line Certified check box at the far right of the line will "uncertify" the line.

1. Line Certified By - ERS generated message identifying the certifier and the date of certification.

2. Status - Until each line on the report is certified the report status will be **"Partially Certified".**

Line Certification (cont'd)

When all of the individual effort lines are certified, the report status will change to **"Certified."**

1. Status - shows as **"Certified"** after all individual line certifications are completed.