



# JOB AID

Effort  
Reporting  
System

## 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:

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### 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.

EFFORT REPORT LIST
Export List Send List Print List ?

Display Saved Search: My Projects

Show Status: ALL Reporting Periods: All Select: 06/07 Non-Academic Fall

Edit Report View/History Comment Log

Version: 1.1 (01/02/2008 04:45) | Status: Partially Certified  
 Service Period: July 1, 2006 to September 30, 2006  
 Pay Periods: July 1, 2006 to September 30, 2006

This report will remain open until all lines of the report have been certified.

Federally Sponsored Projects	Payroll %	Adjusted Payroll %	Adjusted Cost Share %	Original Total %	Total Effort %	Line Certified
10988-24197-NPSAL NSF-AST-0540567-BLITZ-05/08	49%	49 %	0 %	49%	49%	<input type="checkbox"/>
23512-12067 WSP-P033A060638 06-07 On	26%	26 %	0 %	26%	26%	<input type="checkbox"/>
<b>ADD ADDITIONAL SPONSORED PROJECT</b>						
<b>Total Federally Sponsored Projects</b>	<b>75%</b>	<b>75%</b>	<b>0%</b>	<b>75%</b>	<b>75%</b>	
<i>Other Sponsored Projects</i>	0%	0 %	+ 0 %	0%	0%	
<i>Non-Sponsored Activities</i>	25%	25 %	- 0 %	25%	25%	
<b>Total Other and Non-Sponsored</b>	<b>25%</b>	<b>25%</b>	<b>0%</b>	<b>25%</b>	<b>25%</b>	
<b>Grand Total</b>	<b>100%</b>	<b>100%</b>	<b>0%</b>	<b>100%</b>	<b>100%</b>	

**UPDATE CALCULATION**

**1 Report options:**  Report requires multiple certifications.  
 Report allows for Allow Cost Sharing Against Other Sponsored Projects.

**Add a comment:** Multiple Certifications checkbox activated to enable Dr. Investigator to certify the effort on his project(s), and Dr. Scientist to certify the effort on her project(s).  
Comments can be up to 255 characters long. (Total characters: 169)

VIEW PAYROLL DETAILS
REVERT SAVE CERTIFY EFFORT REPORT

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R8.2 B001

**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.

USC/NIH H21993A HINDS 3/05 53.5% 4-445950/WH-57852	37%	37%	0%	0%	37%	37%
EPA CR82805901 FROINES 12/08 53.5% 4-447711/AM-22475	20%	20%	0%	0%	20%	20%
<b>Total Sponsored Projects</b> <i>requiring certification</i>					100%	100%
<i>Other Sponsored Projects</i>	0%	0%		+ 0%	0%	0%
<i>Non-Sponsored Activities</i>	0%	0%		- 0%	0%	0%
<b>Total Other Effort</b> <i>not requiring certification</i>	0%	0%		0%	0%	0%
<b>Grand Total</b>	100%	100%		0%	100%	100%

**UNDEFINED**

Are you sure that you want to require each line of this report to be certified individually?

**Report Options:**

Report requires multiple certifications.

Report allows for Cost Sharing Offset Against Other Sponsored Projects.

**Add a comment:**

Comments can be up to 255 characters long. (Total characters: 0)

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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”**

EFFORT REPORT LIST Export List Send List Print List ?

Display Saved Search: My Projects

Show Status: ALL Reporting Periods:  All  Select: 06/07 Non-Academic Fall

Edit Report View/History Comment Log

Version: 1.1 (01/02/2008 04:45) | Status: Partially Certified  
 Service Period: July 1, 2006 to September 30, 2006  
 Pay Periods: July 1, 2006 to September 30, 2006

■ This report will remain open until all lines of the report have been certified.

Federally Sponsored Projects	Payroll %	Adjusted Payroll %	Adjusted Cost Share %	Original Total %	Total Effort %	Line Certified
10988-24197-NPSAL NSF-AST-0540567-BLITZ-05/08	49%	49 %	0 %	49%	49%	<input checked="" type="checkbox"/>
23512-12067 WSP-P033A060638 06-07 On	26%	26 %	0 %	26%	26%	<input checked="" type="checkbox"/>
<span>ADD ADDITIONAL SPONSORED PROJECT</span>						
<b>Total Federally Sponsored Projects</b>	<b>75%</b>	<b>75%</b>	<b>0%</b>	<b>75%</b>	<b>75%</b>	
<b>Other Sponsored Projects</b>	<b>0%</b>	<b>0 %</b>	<b>+ 0 %</b>	<b>0%</b>	<b>0%</b>	
<b>Non-Sponsored Activities</b>	<b>25%</b>	<b>25 %</b>	<b>- 0 %</b>	<b>25%</b>	<b>25%</b>	
<b>Total Other and Non-Sponsored</b>	<b>25%</b>	<b>25%</b>	<b>0%</b>	<b>25%</b>	<b>25%</b>	
<b>Grand Total</b>	<b>100%</b>	<b>100%</b>	<b>0%</b>	<b>100%</b>	<b>100%</b>	

UPDATE CALCULATION **2**

Report options:  Report requires multiple certifications.  
 Report allows for Add Cost Sharing Against Other Sponsored Projects.

Add a comment:

Comments can be up to 255 characters long. (Total characters: 0)

VIEW PAYROLL DETAILS REVERT SAVE CERTIFY EFFORT REPORT

- 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.

EFFORT REPORT LIST
Export List Send List Print List ?

Display Saved Search: My Projects

Show Status: ALL
Reporting Periods: All Select: 06/07 Non-Academic Fall

Edit Report
View/History
Comment Log

Version: 1.1 (01/02/2008 04:45) **Status: Partially Certified** 2

▪ This report will remain open until all lines of the report have been certified.

Federally Sponsored Projects	Payroll %	Adjusted Payroll %	Adjusted Cost Share %	Original Total %	Total Effort %	Line Certified
10988-24197-NPSAL NSF-AST-0540567-BLITZ-05/08	49%	49%	0%	49%	49%	<input checked="" type="checkbox"/>
Line certified by 70238 on January 2, 2008						
23512-12067 WSP-P033A060638 06-07 On	26%	26%	0%	26%	26%	<input type="checkbox"/>
<b>ADD ADDITIONAL SPONSORED PROJECT</b>						
<b>Total Federally Sponsored Projects</b>	<b>75%</b>	<b>75%</b>	<b>0%</b>	<b>75%</b>	<b>75%</b>	
<b>Other Sponsored Projects</b>	<b>0%</b>	<b>0%</b>	<b>+ 0%</b>	<b>0%</b>	<b>0%</b>	
<b>Non-Sponsored Activities</b>	<b>25%</b>	<b>25%</b>	<b>- 0%</b>	<b>25%</b>	<b>25%</b>	
<b>Total Other and Non-Sponsored</b>	<b>25%</b>	<b>25%</b>	<b>0%</b>	<b>25%</b>	<b>25%</b>	
<b>Grand Total</b>	<b>100%</b>	<b>100%</b>	<b>0%</b>	<b>100%</b>	<b>100%</b>	

**UPDATE CALCULATION**

**Report options:**

Report requires multiple certifications.

Report allows for Add Cost Sharing Against Other Sponsored Projects.

**Add a comment:**

Multiple Certification checkbox activated to enable Dr. Investigator to certify the effort on his project(s), and Dr. Scientist to certify the effort on her project(s).

Comments can be up to 255 characters long. (Total characters: 0)

**VIEW PAYROLL DETAILS**
REVERT
SAVE
**CERTIFY EFFORT REPORT**

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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.”**

EFFORT REPORT LIST
Export List Send List Print List ?

Display Saved Search: My Projects

Show Status: ALL Reporting Periods: All Select: 06/07 Non-Academic Fall

Edit Report View/History **Comment Log**

Version: 4.0 (03/03/2008 12:46) **Status: Certified** ← 1

Service Period: July 1, 2007 to September 30, 2007

Pay Periods: July 1, 2007 to September 30, 2007

Report Version: 4.0 (03/03/2008) Certified

Federally Sponsored Projects	Payroll %	Adjusted Payroll %	Adjusted Cost Share %	Original Total %	Total Effort %	Line Certified
10988-24197-NPSAL NSF-AST-0540567-BLITZ-05/08	49%	49%	0%	49%	49%	✓
Line certified by 70238 on January 2, 2008						
23512-12067 WSP-P033A060638 06-07On	26%	26%	0%	26%	26%	✓
Line certified by 70238 on January 2, 2008						
<i>Other Sponsored Projects</i>	0%	0 %	+ 0 %	0%	0%	
<i>Non-Sponsored Activities</i>	25%	25 %	- 0 %	25%	25%	
<b>Total Other and Non-Sponsored</b>	<b>25%</b>	<b>25%</b>	<b>0%</b>	<b>25%</b>	<b>25%</b>	
<b>Grand Total</b>	<b>100%</b>	<b>100%</b>	<b>0%</b>	<b>100%</b>	<b>100%</b>	

**Report options:**

Report requires multiple certifications.

Report allows for Allow Cost Sharing Against Other Sponsored Projects.

**Add a comment:**

Multiple Certifications checkbox activated to enable Dr. Investigator to certify the effort on his project(s), and Dr. Scientist to certify the effort on her project(s).

Comments can be up to 255 characters long. (Total characters: 169)

**Comment for v4.0:** 03/03/08 12:43 PM

Report certified by

on Mar 3, 2008

VIEW PAYROLL DETAILS
REOPEN EFFORT REPORT

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