

Welcome to Effort Reporting System (*ERS*)

Certifier Instructions

University of Pennsylvania | Office of Research Services

Effort Reporting Rules


- 1). When the review of the effort report is complete by the Business Admin, Effort Reporting System sends a notification e-mail to the Certifier that the form is ready for review and certification.
- 2). Certifiers should review the effort report form, communicate any significant changes in effort and add notes as applicable.
- 3). If it is correct, read the certification statement and Certify.

Additional effort reporting resources and reference materials:

<http://www.upenn.edu/researchservices/effortreportingA.html>

Log on:

Upon receipt of e-mail notification from the Effort Reporting System follow the to login using PennKey and Password. The Effort Reporting System can also be accessed by going to <https://penners.isc-seo.upenn.edu/GenericERS/>

**Penn**
UNIVERSITY of PENNSYLVANIA

Penn WebLogin
Log in to gain access to many protected University web resources.

PennKey

Username

Password

Log in

Forgot PennKey [username](#) / [password](#)?

[Test Your PennKey](#)

Change My [Password](#)

Welcome to the Effort Reporting System

Effort report forms that have been assigned to a certifier will be reflected on the certifier's home page in the My Status/To Do box. Effort reports pending your certification are categorized into: 1). Reports for Current Period, and 2). Report from Prior Period. Click either link to begin certification.

The screenshot displays the University of Penn Effort Reporting System (ERS) interface. At the top, the University of Penn logo is on the left, and the user's name "CRUZ, AMY" and role "Certifier" are on the right. Navigation links for "Home", "Profile", and "Logout" are also present. Below the header, there are three main sections: "Search Employee Effort Forms", "My Status / To Do", and "Messages".

The "Search Employee Effort Forms" section includes a search bar with radio buttons for "Employee" (selected) and "Account", and a "Search" button.

The "My Status / To Do" section is highlighted with a red border and contains a table showing the status of effort reports. A blue arrow points to the "Current" column header.

		Current	Prior(s)
Certification	Pending	2	0
	Pending Pre Review	0	2

The "Messages" section displays an announcement dated 2019-01-01: "REMINDER: Payroll reallocations affecting CLOSED effort periods are considered over-90-day cost transfers. Restricted Payroll Reallocation Requests should be submitted to your respective ORS Post Award Accountant along with over-90-day CT justification/approval."

At the bottom, a small text line reads: "ERS provided by MAXIMUS, Inc."

Select an Effort Report to Certify

To begin, click on the  icon next to the name of the effort from you want to certify.

Note: Certifier can choose to click on the icon to certify each individual form or click “Certify Multiple Forms” to certify forms as a batch.



University of Penn

[Home](#) [Profile](#) [Logout](#)

CRUZ, AMY
Certifier

Effort Forms  Reports  Help 

Effort Forms Pending Certification (063004)

Reporting Period 063004

Certify Multiple Forms


Displaying 2 of 2 records

Certify	Employee Name	Title	Sub Department	Sub Department Name	Form Status	Pre Reviewed By	Certified By	Post Reviewed By	RCT	Assigned Certifier
[All]			[All]		[All]				[All]	
	BOHR, NIELS	NA	1320	SCIENCE DEPARTMENT	Pending Certification	BLACK, JOHN				CRUZ, AMY
	CRUZ, AMY	NA	1320	SCIENCE DEPARTMENT	Pending Certification	BLACK, JOHN				CRUZ, AMY

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Review and Confirm % Effort




After selecting a report, review the % effort on each award in the Certified Effort % column. If this is a reasonable estimate of actual effort (charged and cost-shared) expended on each project, no changes are needed; if actual effort differs from the report, contact your Pre-Reviewer to discuss. Total Certified Effort % must equal 100%.





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CRUZ, AMY
Certifier

Effort Forms  Reports  Help 

Bulk Certification

CRUZ, AMY (88132001) - NA
Reporting Period: Spring (01-01-2004 through 06-30-2004)

Accounts	Description	Payroll %	Cost Sharing %	Total %	Certified Effort %
Sponsored Accounts					
130-1301-4-537329-5010-2000-0011	5-R01-NS-0039679	42%	3%	45%	45%
130-1301-4-542114-5010-2000-0003	DAMD17-03-1-0713	26%	0%	26%	26%
 130-1301-4-542470-5010-2000-0000	Cost Share DAMD	10%		10%	10%
Sponsored Subtotal		78%	3%	81%	81%
Non-Sponsored Accounts					
130-1301-1-000000-5010-4321-0000	GENERAL UNRESTRI	22%	-3%	19%	19%
Non-Sponsored Subtotal		22%	-3%	19%	19%
Grand Total		100%	0%	100%	100%

Notes for CRUZ, AMY (88132001)

0 of 800 characters used.

☐ I have reviewed the above Effort Form.
(0 of 1 forms reviewed)

Exit

Reset

Save

Proceed

Complete the Institutional Summary (if applicable)

Clinicians and faculty compensated on CPUP accounts, are required to complete the Institutional Summary to account for the non-sponsored activities. This sub-total should equal the sum of non-sponsored effort reported in the previous screen. Enter number of average weekly hours for all activities including sponsor projects and click “Proceed” when finished.

Certify

Institutional Summary

Account ID	Account Description	Effort %
400-4231-2-014003-1511-3407-0000	CPUP INTERFUND	59%
400-4231-2-014003-1522-3407-0112	CPUP INTERFUND	36%
Sub Total:		95%

As the Certifier you are required to define the details of the Institutionally Funded Account at this time. Please fill in the percents for each activity type. Make sure the total adds up to 95%.

Clinical Activity-Direct Patient Care	<input type="text"/> 0 %	
Clinical Activity-Education of House Staff	<input type="text"/> 0 %	
Clinical Activity-Administration	<input type="text"/> 0 %	
Other Activity	<input type="text"/> 0 %	
Sub Total:		0 %
Enter Average Weekly Hours		<input type="text"/> 0

Cancel Proceed

400-4231-4-538927-5010

400-4429-4-541375-5010

400-4231-2-014003-1511

400-4231-2-014003-1522

Notes


Click on any of the links for a description of each non-sponsored activity type

Distribute non-sponsored activity among four categories. Total should equal the amount of all non-sponsored % entered on the effort form.

Finalize Certification

Review the summary of Certified Effort % + institutional summary and notes, if applicable. Click “Certify” to attest to and finalize the certification.

Exit the report to return to the Worklist.






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Home Profile Logout

CRUZ, AMY
Certifier

Effort Forms Reports Help

Bulk Certification



CRUZ, AMY (88132001) - NA Reporting Period: Spring (01-01-2004 through 06-30-2004)					
Accounts	Description	Payroll %	Cost Sharing %	Total %	Certified Effort %
Sponsored Accounts					
130-1301-4-537329-5010-2000-0011	5-R01-NS-0039079	42%	3%	45%	45%
130-1301-4-542114-5010-2000-0003	DAMD17-03-1-0713	26%	0%	26%	26%
130-1301-4-542470-5010-2000-0000	Cost Share DAMD	10%		10%	10%
Sponsored Subtotal		78%	3%	81%	81%
Non-Sponsored Accounts					
130-1301-1-000000-5010-4321-0000	GENERAL UNRESTRI	22%	-3%	19%	19%
Non-Sponsored Subtotal		22%	-3%	19%	19%
Grand Total		100%	0%	100%	100%

Notes for CRUZ, AMY (88132001)
Notes are displayed on the certified report as part of the audit trail.

☒ I have reviewed the above Effort Form.
(1 of 1 forms reviewed)

I confirm that the distribution of activity represents a reasonable estimate of all work performed by me during the stated period or in the event that I am certifying effort for someone other than myself, that I have Suitable Means of Verification, as indicated in the notes section on the previous screen, to certify on behalf of this employee.

I understand that falsification of effort statements may result in potential disallowed costs, penalties and/or actions under the federal False Claims Act.

Certify


Exit

Make Changes

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View Worklist Status




If you have additional reports to certify, continue certifying reports in the same manner. When you are finished certifying reports, click Logout in the top right corner to exit the system, or Home to work on reports from a different period.



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Home Profile Logout

CRUZ, AMY
Certifier



Effort Forms  Reports  Help 

Effort Forms Pending Certification (063004)

Reporting Period 063004

Certify Multiple Forms

Displaying 2 of 2 records

Certify	Employee Name	Title	Sub Department	Sub Department Name	Form Status	Pre Reviewed By	Certified By	Post Reviewed By	RCT	Assigned Certifier
[All]			[All]		[All]				[All]	
	CRUZ, AMY	NA	1320	SCIENCE DEPARTMENT	Certified	BLACK, JOHN	CRUZ, AMY			CRUZ, AMY
	BOHR, NIELS	NA	1320	SCIENCE DEPARTMENT	Pending Certification	BLACK, JOHN				CRUZ, AMY

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