

Welcome to Effort Reporting System (*ERS*)

Assignments for DC's - Part 1 (managing default department roles)

University of Pennsylvania | Office of Research Services

Change Assignments for Department or Sub Departments

Departmental Coordinators (DC) are responsible for managing departmental role assignments for the Effort Reporting System (ERS).

This section of the Assignment module covers Changing Assignments for Departments and Sub Departments.

Assignments Function

Assignments can be updated by either the DC or the Sub DC. To begin, select Assignments from the Management option menu.

The screenshot displays the University of Penn system interface. At the top, the University of Penn logo is on the left, and the user's name 'BLACK,JOHN' and title 'Departmental Coordinator' are on the right. The main navigation bar includes 'Effort Forms', 'Management', 'Reports', and 'Help'. The 'Management' menu is open, showing 'Assignments' (highlighted with a red box), 'Notifications', and 'Print Forms'. The 'Assignments' option is the first item in the dropdown menu.

Effort Form Status

0% Complete Total 0 out of 16 forms Complete

16 pending Pre Review
0 pending Certification
0 pending Post Review
15 from Prior Periods

Reporting Period
063004

My Status / To Do

		Current	Prior(s)
Pre Review	Pending Critical	2	0
	Pending Non-Critical	10	11

Search Employee Effort Forms

☒ Employee ☐ Account

Messages

ANNOUNCEMENTS

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.

Assignments

Next, select “Change Assignments for Departments or Sub Departments” or to manage default department role assignments: Sub Department Coordinator & Pre Reviewer.

The screenshot displays the University of Penn ERS system interface. At the top left is the University of Penn logo. The top center features the text "University of Penn". To the right of the logo are navigation links: "Home", "Profile", and "Logout". Below the logo are icons for "Effort Forms", "Management", "Reports", and "Help". On the right side, the user's name "BLACK,JOHN" and title "Departmental Coordinator" are displayed, along with a link to "View Assigned Departments". The main content area is titled "Assignments" and contains two bullet points. The first bullet point states: "To assign Sub DC, Pre Reviewer, or Post Reviewer for the entire Department or a Sub Department, click on:" followed by a link "Change Assignments for Department or Sub Departments" which is highlighted with a red rectangle. The second bullet point states: "To change assignments for individual(s), click on:" followed by a link "Change Assignments for Individuals". At the bottom of the page, it says "ERS provided by MAXIMUS, Inc."

University of Penn

Home Profile Logout

BLACK,JOHN
Departmental Coordinator
[View Assigned Departments](#)

Effort Forms Management Reports Help


Assignments

- To assign Sub DC, Pre Reviewer, or Post Reviewer for the entire Department or a Sub Department, click on:
[Change Assignments for Department or Sub Departments](#)
- To change assignments for individual(s), click on:
[Change Assignments for Individuals](#)

ERS provided by MAXIMUS, Inc.

Changing Assignments for Department and Sub Departments

List of your Sub Departments and their respective Sub DC, Pre Reviewer, and Post Reviewer default role assignment is displayed. To update any of these select the checkbox next to the desired Sub Department. Click “Proceed” to continue.



University of Penn

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

[Effort Forms](#) [Management](#) [Reports](#) [Help](#)

BLACK,JOHN
Departmental Coordinator
[View Assigned Departments](#)

Change Sub Department Assignments

You are in charge of the following sub department(s). Please select from the following list and click **Proceed** to continue with the Assignments process.

Displaying 1 of 1 records

Sub Department Assignments					Sub DC Rights		
Select Sub Department	Sub DC	Pre Reviewer	Post Reviewer	Allow No Pre Review	Edit Pre Reviewer	Edit Certifier	Edit Post Reviewer
<input checked="" type="checkbox"/> 1320	BLACK,JOHN	RONTGEN,WILHELM	BLACK,JOHN	N	Y	Y	Y


Back

Proceed

ERS provided by MAXIMUS, Inc.





Changing Assignments for Department and Sub Departments (cont.)

By selecting the “Change Sub DC/Update Sub DC Rights” option, the Department Coordinator can change the individual assigned as the Sub DC. Select checkbox and click “Proceed” to continue.



University of Penn

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

Effort Forms  Management  Reports  Help 

BLACK,JOHN
Departmental Coordinator
[View Assigned Departments](#)

Change Sub Department Assignments

You have selected sub department 1320 - SCIENCE DEPARTMENT

If this is correct, select the option and click **Proceed**. If this is not correct, please click **Back** to select another sub department.

Current Settings For Sub Department 1320 - SCIENCE DEPARTMENT							
Sub Department Assignments					Sub DC Rights		
Sub Department	Sub DC	Pre Reviewer	Post Reviewer	Allow No Pre Review	Edit Pre Reviewer	Edit Certifier	Edit Post Reviewer
1320	BLACK,JOHN	RONTGEN,WILHELM	BLACK,JOHN	N	Y	Y	Y

You have following options to adjust current Sub Department Assignments. Please select an appropriate option to continue:

☒ Change SubDC / Update SubDC Rights For 1320.
☐ Change Sub Department Pre Reviewer For 1320.


Back

Proceed

ERS provided by [MAXIMUS, Inc.](#)®

Changing Sub DC or Updating Sub DC rights (cont.)

You may select a person from the displayed list, which consists of everyone in their domain, or you may search for another individual by selecting the “Assign somebody not in your domain” link at the top of the page. Select a person to be the new Sub DC and click the “Proceed” button.



University of Penn

Home Profile Logout

Effort Forms Management Reports Help

BLACK,JOHN
Departmental Coordinator
[View Assigned Departments](#)

Change Sub Department Assignments

You have selected the option - Change SubDC / Update SubDC Rights for Sub Department: 1320

To change Sub DC, you may choose one from the following options:

- Assign somebody not in your domain, or
- Assign somebody from the following list:

Displaying 17 of 17 records


	Employee Name	Sub Department
<input type="radio"/>	BLACK,JOHN	1320
<input type="radio"/>	BOHR,NIELS	1320
<input type="radio"/>	CRUZ, AMY	1320
<input type="radio"/>	DARWIN,CHARLIE	1320
<input checked="" type="radio"/>	DESCARTES,RENE	1320
<input type="radio"/>	EDISON,TOM	1320
<input type="radio"/>	FLANNIGAN, PATRICK	1320
<input type="radio"/>	GALILEO,GALILEI	1320
<input type="radio"/>	MUNN, KELLY	1320
<input type="radio"/>	NEWTON,ISAAC	1320
<input type="radio"/>	PATEL, NIMESH	1320
<input type="radio"/>	PLANCK,MAX	1320
<input type="radio"/>	RONTGEN,WILHELM	1320
<input type="radio"/>	SAGAN,CARL	1320
<input type="radio"/>	SMART, ROBERT	1320
<input type="radio"/>	TESLA,NIKOLA	1320
<input type="radio"/>	YI, JASON	1320

Back

Proceed





Changing Sub DC or Updating Sub DC rights (cont.)

Once the user designates an individual to be the Sub DC, they will be directed to set the Sub DC Rights for the selected individual. Click “Apply” without changing the settings.



University of Penn

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

Effort Forms  Management  Reports  Help 

BLACK,JOHN
Departmental Coordinator
[View Assigned Departments](#)

Change Sub Department Assignments

Summary For Sub Department 1320

Sub Department:	1320 - SCIENCE DEPARTMENT
Sub DC:	DESCARTES,RENE
Current Role for DESCARTES,RENE is:	No Role in ERS
Role for DESCARTES,RENE after assignment will be:	Sub DC


Please Specify the SubDC Rights for Sub Department 1320

Allow Sub DC to assign 'No Pre Reviewer' to individuals?	<input type="radio"/> Yes <input checked="" type="radio"/> No
Allow Sub DC to change Pre Reviewer to individuals?	<input checked="" type="radio"/> Yes <input type="radio"/> No
Allow Sub DC to change Certifier to individuals?	<input checked="" type="radio"/> Yes <input type="radio"/> No
Allow Sub DC to change Post Reviewer to individuals?	<input checked="" type="radio"/> Yes <input type="radio"/> No

If the above information is correct, please click **Apply** to apply the change and proceed. To select another employee, click **Back**.

Back

Apply




ERS provided by MAXIMUS, Inc.®

Changing Sub DC or Updating Sub DC rights (cont.)

Next, click “Apply” to complete the assignment.





A summary of the current Sub Department assignments is displayed. To continue managing assignments for the selected Sub Department, select **Continue** or select **Exit** to work on different tasks.



University of Penn

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

BLACK,JOHN
Departmental Coordinator
[View Assigned Departments](#)

Effort Forms  Management  Reports  Help 

Change Sub Department Assignments

Assignment Confirmation
DESCARTES,RENE has been assigned to coordinate for Sub Department 1320.
Please click on **Apply** button to complete this assignment.

Apply

Change Sub Department Assignments

DESCARTES,RENE has been successfully assigned as Sub DC for Sub Department 1320


Current Settings For Sub Department 1320 - SCIENCE DEPARTMENT							
Sub Department Assignments					Sub DC Rights		
Sub Department	Sub DC	Pre Reviewer	Post Reviewer	Allow No Pre Review	Edit Pre Reviewer	Edit Certifier	Edit Post Reviewer
1320	DESCARTES,RENE	RONTGEN,WILHELM	BLACK,JOHN	N	Y	Y	Y

To continue to work on other assignment options for the same Sub Department, please click on **Proceed**
To work on assignments for another Sub Department, please click on **Return**
To exit assignment, click on **Exit**

Exit Return Continue

Change Sub Department Pre Reviewer





In a selected Sub Department, instead of changing the SubDC, you may change the default Pre Reviewer by selecting the “Change Sub Department Pre Reviewer” option. Select “Proceed” to continue with the assignment change.



University of Penn

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

BLACK,JOHN
Departmental Coordinator
[View Assigned Departments](#)

Effort Forms  Management  Reports  Help 

Change Sub Department Assignments

You have selected sub department 1320 - SCIENCE DEPARTMENT

If this is correct, select the option and click **Proceed**. If this is not correct, please click **Back** to select another sub department.

Current Settings For Sub Department 1320 - SCIENCE DEPARTMENT							
Sub Department Assignments					Sub DC Rights		
Sub Department	Sub DC	Pre Reviewer	Post Reviewer	Allow No Pre Review	Edit Pre Reviewer	Edit Certifier	Edit Post Reviewer
1320	BLACK,JOHN	RONTGEN,WILHELM	BLACK,JOHN	N	Y	Y	Y

You have following options to adjust current Sub Department Assignments. Please select an appropriate option to continue:

☐ Change SubDC / Update SubDC Rights For 1320.

☒ Change Sub Department Pre Reviewer For 1320.


Back

Proceed

ERS provided by MAXIMUS, Inc.®

Changing Sub Department Pre Reviewer (cont.)

Again, select from the list, or search for another individual by clicking the “Assign somebody not in your domain” link at the top of the page. Select a name and click the “Proceed” button.



University of Penn

Home Profile Logout

Effort Forms Management Reports Help

BLACK,JOHN
Departmental Coordinator
[View Assigned Departments](#)

Change Sub Department Assignments

You have selected the option - Change Sub Dept Pre Reviewer for Sub Department: 1320

To change Sub Department Pre Reviewer, you may choose one from the following options:

→

- [Assign No Pre Reviewer](#) (Certifiers can certify the forms without Pre Reviewer reviewing the forms), or
- [Assign somebody not in your domain](#), or
- Assign somebody from the following list:

Displaying 17 of 17 records


	Employee Name	Sub Department
<input type="radio"/>	BLACK,JOHN	1320
<input type="radio"/>	BOHR,NIELS	1320
<input type="radio"/>	CRUZ, AMY	1320
<input type="radio"/>	DARWIN,CHARLIE	1320
<div>→</div> <input checked="" type="radio"/>	DESCARTES,RENE	1320
<input type="radio"/>	EDISON,TOM	1320
<input type="radio"/>	FLANNIGAN, PATRICK	1320
<input type="radio"/>	GALILEO,GALILEI	1320
<input type="radio"/>	MUNN, KELLY	1320
<input type="radio"/>	NEWTON,ISAAC	1320
<input type="radio"/>	PATEL, NIMESH	1320
<input type="radio"/>	PLANCK,MAX	1320
<input type="radio"/>	RONTGEN,WILHELM	1320
<input type="radio"/>	SAGAN,CARL	1320
<input type="radio"/>	SMART, ROBERT	1320
<input type="radio"/>	TESLA,NIKOLA	1320
<input type="radio"/>	YI, JASON	1320

Back

Proceed ←





Changing Sub Department Pre Reviewer (cont.)

You will see a Summary page that lists the selected individual's *Current* Role and the individual's *New* Role after the assignment takes place. Select “Apply” to continue with the change.



University of Penn

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

Effort Forms  Management  Reports  Help 

BLACK,JOHN
Departmental Coordinator
[View Assigned Departments](#)

Change Sub Department Assignments


Summary For Sub Department 1320

Sub Department:	1320 - SCIENCE DEPARTMENT
Sub Dept Pre Reviewer:	DESCARTES,RENE
Current Role for DESCARTES,RENE is:	No Role in ERS
Role for DESCARTES,RENE after assignment will be:	Pre Reviewer

If the above information is correct, please click **Apply** to apply the change and proceed. To select another employee, click **Back**.
Warning: Applying the assignment changes for the entire Sub Dept will overwrite the existing individual assignments.

Back

Apply




ERS provided by [MAXIMUS, Inc.](#)®

Changing Sub Department Pre Reviewer (cont.)

Click “Apply” again to complete the assignment change.





Select **Continue** to return to Assignments or select **Exit** to work on different tasks.



University of Penn

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

BLACK,JOHN
Departmental Coordinator
[View Assigned Departments](#)

Effort Forms  Management  Reports  Help 

Change Sub Department Assignments

Assignment Confirmation
DESCARTES,RENE has been assigned to Pre Review for Sub Department 1320.
Please click on **Apply** button to complete this assignment.

Apply

ERS provided by MAXIMUS, Inc.®

Change Sub Department Assignments

DESCARTES,RENE has been successfully assigned as Pre Reviewer for Sub Department 1320

Current Settings For Sub Department 1320 - SCIENCE DEPARTMENT							
Sub Department Assignments					Sub DC Rights		
Sub Department	Sub DC	Pre Reviewer	Post Reviewer	Allow No Pre Review	Edit Pre Reviewer	Edit Certifier	Edit Post Reviewer
1320	BLACK,JOHN	DESCARTES,RENE	BLACK,JOHN	N	Y	Y	Y

To continue to work on other assignment options for the same Sub Department, please click on **Proceed**
To work on assignments for another Sub Department, please click on **Return**
To exit assignment, click on **Exit**

Exit Return Continue

NEED HELP?

Detailed instructions and links to reference materials: <http://www.upenn.edu/researchservices/effortreportingA.html>

Using ERS, or if you are unsure where to get help for a specific question: email ERS Help at ers_help@isc.upenn.edu