



Effort Reporting System (ERS) Quick Reference Guide for Certifiers ers_help@isc.upenn.edu

Logging On

- Enter your **PennKey** and **PennKey Password**.
 - ☞ You cannot change your PennKey Password within ERS. For information regarding PennKey and Password go to <http://www.upenn.edu/computing/pennkey/>

Certifying the Effort Form

1. Select the **Certify** option on the left-side menu bar.
2. Click the **Certify** link on the next screen.
3. Select **Current Period**.
 - ☞ In the future, you will have read access to prior reporting periods.
4. Select the Sub Department(s) for the employee(s) you would like to Certify by checking the appropriate boxes. Click on **Continue** to execute the selection criteria.
 - ☞ You may also filter using the "Certified" flag, to select employees who are "Certified" or "Not Certified".
5. The next screen will list individuals in the **Effort Forms Available to Certify** section that are ready or have already been certified. The **Certified** column will indicate either a **Y** (Yes), **N** (No), or **N (saved)** indicating viewed but not certified. Click on the name of the employee you are certifying (either yourself or an individual for whom you are responsible and have a suitable means of verifying that the work was performed).
6. Review the effort form to make sure the percentages correctly represent the employee's effort based on salary charged to the award. Review any changes made by the Pre Reviewer by clicking on Pre Review Details and then click Return. Change the effort percentages if they are incorrect and click on **Proceed**. [If you have questions regarding the effort form, you can contact your Sub Department Coordinator (Pre Reviewer) by clicking on **Notify** at the bottom of the screen.]
7. If a UPHS Clinical Faculty member, review the **University Funded Accounts Summary** screen. If completed by the Pre Reviewer, determine if the % distributions are correct. If not, modify and click on **Proceed**.
 - ☞ Insert the number of Average Weekly Hours in the box provided and click on **Proceed**.
8. Review the **Certify Effort Form** screen for accuracy. If correct, read the certification statement and click on **Certify**. If incorrect, click **Return** in order to make adjustments or exit the form without certifying, by clicking on **Exit Form**.
9. After certifying, a copy of the **Certified Effort Statement** can be made by clicking on **Print Form**.
10. Click on **Exit Form**.

Logging Off

- Click the **Log Off** option on the left-side menu bar of the **Certify Effort Forms** screen.