



## **PennERS**

### **Departmental Coordinator**

### **Roles Documentation**

#### **Introduction**

The Departmental Coordinator (DC) plays a critical role in Penn's Effort Reporting system, (ERS). The DC is expected to facilitate the effort reporting process within their department. The process should be efficient, credible, and allow for the certification process to be completed in a timely and accurate manner.

The DC must ensure compliance with effort reporting requirements for federal agencies as well as non-federal sponsors. The DC can ensure compliance by disseminating effort reporting policies and procedures to their department. The DC is also expected to spot-check the completed Effort Report to determine if the procedures are understood and followed within their department. The spot-check process includes verifying that cost sharing is accurately captured, appropriate cost transfers are being made, and that the University Summary of effort on the Certifier's Effort Report is completed, when applicable. Finally, the DC ensures that Effort Reports are completed within the timeframe established by the University and in accordance with federal regulations.

#### **Competencies of the DC would include (but are not limited to):**

- Working knowledge of Payroll and BEN Financials, and familiarity with general accounting principles;
- Trained in the University's effort reporting policies and procedures and familiarity with relevant federal regulations and sponsor expectations;
- Knowledge of departmental budgeting processes and funding sources;
- Knowledge of sponsored projects in their department and individuals who must certify effort;
- Access to award files in their department;
- Knowledge of cost sharing requirements and the ability to verify cost sharing with award documentation;

- Be authorized and accountable for submission of cost transfers/salary reallocations; and
- Fiscally responsible to conduct administrative activities and duties within the department.

**Expectations of the DC include (but not limited to):**

- Provide assistance to staff and faculty who participate in the effort process and use of PennERS;
- Respond to questions regarding effort reporting policies and procedures;
- Ensure that completed Effort Reports depict at least, the amount of effort represented by the salary paid;
- Review the Effort Report changes completed by Pre Reviewers and Post Reviewers;
- Determine if cost sharing is captured properly;
- Determine if cost transfers made within University policies and sponsor terms and conditions:
  - Ensure that the University Summary is completed for UPHS Physicians;
- Ensure that Effort Reports are completed in a timely fashion:
  - Monitor department completion using ERS reports;
  - Follow-up with delinquent employees;
  - Ensure the Effort Report appropriately represents the employee's effort profile;
- Coordinate Pre Reviewer and Post Review duties in PennERS when appropriate:
  - Although a DC may fulfill the role of Pre Reviewer and/or Post Reviewer, a DC should not also be a certifier for other individuals' Effort Reports;
  - Review email addresses for all employees involved in the Effort Reporting process (assuring an email address exists in the online directory) and assist in resolving any email address issues or special needs; and
  - Ensure that the Pre and Post Reviewers have received Payroll training and have the appropriate Payroll access (required for completing salary reallocations).