Welcome to Effort Reporting System (ERS)

Assignments for DC’s - Part 2
(managing individual effort form assignments)

University of Pennsylvania | Office of Research Services
Assignment Overview

Departmental Coordinators (DC) are responsible for managing departmental role assignments and review all PreReviewer and Certifier assignments on individual effort forms for each effort reporting period. The task should be completed prior to the start of the Pre Review process of effort reports. By default, the Effort Reporting System assigns the covered individual as the certifier of his/her own effort report form and the department PreReviewer as the default Pre-Reviewer unless those assignments were previously changed. Assignments should be reviewed by either the Department Coordinator (DC) or the Sub Department Coordinator (Sub DC) and updated as needed. Upon completion of this task, the DC and/or Sub DC should notify PreReviewers to proceed with their reviews.

This section of the Assignment module covers Changing Assignments for Individuals.
Assignments Function

To begin, select Assignments from the Management option menu.
Change Individual Assignments

To change Individual Effort Form Assignments (change the Pre Reviewer or Certifier on individual report), select the “Change Assignments for Individuals” option to proceed with the Assignments process.
Changing Assignments for Individuals

Next, select the Department(s) and Sub Department(s) for review. If more than one Sub Department is selected, a single pool of individuals will be generated.
Changing Assignments for Individuals (cont.)

If an effort form assignment needs to be changed select the effort form and click “Proceed”.

**Review the specific effort PreReviewer and Certifier assignments, paying special attention to New Employees and Terminated Employees (as designated under the “Status” column).
Changing Assignments for Individuals (cont.)

To make changes to the Pre Reviewer or Certifier assignments, select one of these options and click “Proceed”. To select an alternate sub department for purposes of effort reporting, select the respective check box and click “Proceed”.

Note: Updates can be made for multiple individuals at the same time provided the change being made is applicable to all of the selected individuals.
Changing Assignments for Individuals - Changing Pre Reviewer

If “Change Pre Reviewer” is selected, continue with the assignment change by clicking the **Proceed** button.
Select the radio button next to desired Pre Reviewer. If the desired Pre Reviewer is not listed in the selected domain(s), select the *Assign somebody not in your domain* link to search from a list of individuals outside your Department.
Changing Assignments for Individuals - Changing Pre Reviewer (cont.)

Once the desired Pre Reviewer has been selected, a summary of the Pre Reviewer designation and the updated Pre Reviewer Assignments is presented to review the information before confirming the assignment. Select **Apply** to complete the role adjustment.
Changing Assignments for Individuals - Changing Pre Reviewer (cont.)

Next, click Apply to complete the assignment. To continue work on the same individual(s), select Continue; or to work on another individual in the previously selected sub departments, select Return.
Changing Assignments for Individuals - Changing Certifier

Once the effort form for which an assignment change is needed is selected, choose the radio button next to the “Change Certifier” and then click the Proceed button.
Changing Assignments for Individuals - Changing Certifier (cont.)

The screen displays a list of individuals available in the selected domain(s). If the desired Certifier is not listed, you may search for the individual by selecting the “Assign somebody not in your domain” option presented on the screen. Select a person to be the new Certifier and click the “Proceed” button.
Changing Assignments for Individuals - Changing Certifier (cont.)

Select **Apply** to accept any resulting role adjustment.
Changing Assignments for Individuals - Changing Certifier (cont.)

Select **Apply** to complete the assignment.
Changing Assignments for Individuals - Changing Certifier (cont.)

When the assignment change is complete, the system provides a confirmation.

To continue work on the same individual(s), select **Continue** or select **Return** to work on another individual in the previously selected sub departments or **Exit** the assignments main page.
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