How to Access the Effort Reporting System (ERS) to Certify Effort Reports

- *Guide for Certifiers (Principal Investigator or designated responsible official who has suitable means of verification to certify the effort form(s).*

1. **Login to ERS**
   Go to https://ers.northwestern.edu and login with your NetID. Multi-Factor Authentication (MFA) is required; off campus only, VPN is also required.
   - *If you need help with NetID, MFA, or VPN, please contact the Northwestern IT Service Desk at consultant@northwestern.edu or 847-491-3457.*

2. **Access Effort Reports**
   Reports ready to certify (from current or prior periods) are accessible from the Pending Certification links (numerical digits) under STATUS/MY TO DO. Click on a number to see a list of reports.
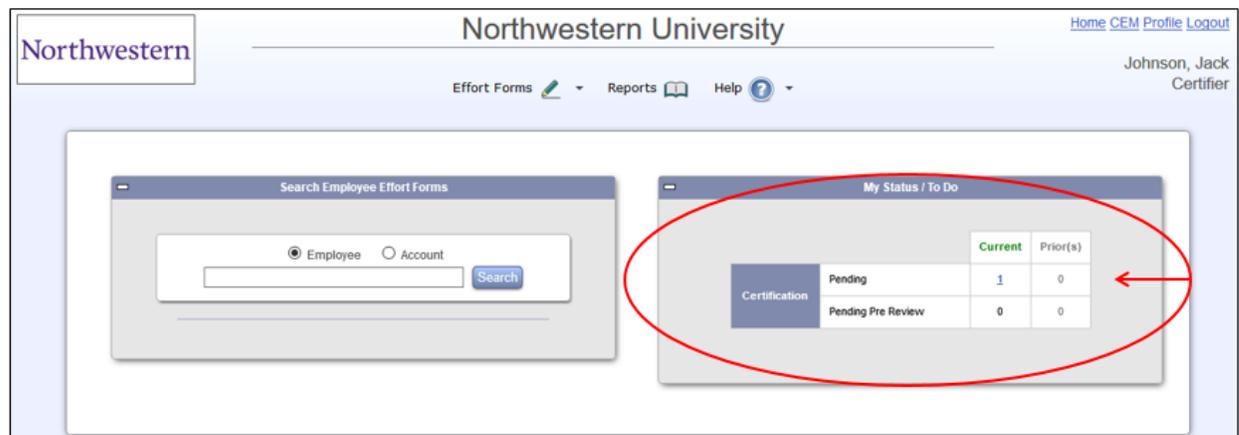
3. **Select an Effort Report to Certify**

   This screen displays the reports which have been pre reviewed by your administrator, and are now ready for you to certify. Click on a name to get started.

4. **Confirm % Effort per Chart String**

   • Review the estimated % effort per chart string in the Certified Effort % column (pre-populated with your administrator's estimates). If this is an accurate assessment of actual effort (charged and cost-shared) you or your employee expended on each chart string, no changes are needed; if actual effort differed from your administrator's estimates, update the % effort per chart string as appropriate. Total Certified Effort % must equal 100%.

   • You may enter additional explanation or comments in the "Notes" field if desired (not required). Notes are displayed on the certified effort report as part of the audit trail. When your review (including updates if appropriate) is complete, click "Proceed."

5. Finalize Certification

Review the summary of Certified Effort % per chart string and notes if applicable. If all is complete & correct, click "Certify" to attest to and finalize the certification.

Click "Certify" to complete certification

If the finalized effort % per chart string includes corrections to your administrator's pre review estimates, or you have added or modified notes, she/he/they will be notified so action can be taken as needed.

If the information entered does not accurately reflect effort, do not certify the report. Click "Make Changes" to go back and correct, or "Exit" if you need to save the report and come back later.

Certify

Name: Johnson, Jack
Sub Dept: 884400 - DEMO SUBDEPT44

Employee ID: 8884401
Division: DEMODIV - DEMODIVISION

Title: Asst Professor
Title Code: 100021

Certification Complete
Johnson, Jack on 07-22-2019

Reporting Period: 2Q2019 (12-01-2018 through 02-28-2019)

Accounts	Description	Payroll %	Cost Sharing %	Total %	Certified Effort %
	Sponsored Accounts				
010-5249999-00012345	CHEMO RESEARCH	33%	0%	33%	33%
010-5249999-00054321	Vitamin Effects Stud	0%	15%	15%	15%
010-5299999-00054321	Sleep Pattern Study	0%	10%	10%	15%
010-5991234-00099999	STEM CELL RESEARCH	17%	0%	17%	17%
	Sponsored Subtotal	50%	25%	75%	80%
	Non-Sponsored Accounts				
110-1234567	Dept Unrestricted	50%	-25%	25%	20%
	Non-Sponsored Subtotal	50%	-25%	25%	20%
	Grand Total	100%	0%	100%	101%

Notes
Of 20% total on 110, 5% is for effort fulfilled on SP0012345, pending chart string set up.

I certify that the effort allocation for the individual shown above is a fair representation for the period noted.

Certify

Exit | Make Changes | Notify

6. Exit The Report to Return to Worklist

Certify

Name: Johnson, Jack
Sub Dept: 884400 - DEMO SUBDEPT44

Employee ID: 8884401
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Certification Complete
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110-1234567	Dept Unrestricted	50%	-25%	25%	20%
	Non-Sponsored Subtotal	50%	-25%	25%	20%
	Grand Total	100%	0%	100%	101%

Notes
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I certify that the effort allocation for the individual shown above is a fair representation for the period noted.

Exit | Make Changes | Notify

If desired, print certified report or save as PDF.

The certified effort form is displayed on the final screen with your name and date stamp.

Click "Exit" if the certification is accurate and final, or Make Changes if you made a mistake and need to correct.

7. **View Worklist Status**
    - After clicking "Exit" at the bottom of the completed effort report, you will return to your certification worklist, which displays the certified status. If you have additional reports to certify, click on an individual's name to review and complete.
    - If 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.

Effort Reporting System Version 10.1