How to access ERS and certify your Effort report(s)

Applicable Role: Certifier (Principal Investigator or the designated responsible official who has suitable means of verification to certify the Effort form)

1. Accessing the ERS home page

Go to https://ersweb.itcs.northwestern.edu/GenericERS and log onto ERS using your NetID and password. To access ERS, a valid NU NetID and password are required. Contact 1-4357 if your NetID is inactive or if you do not remember the password for your NU email account.

Note: the URL is case sensitive.

2. Logging on to ERS

Once logged on, the following screen will be displayed. If the purple CEM tab is active and you cannot see the STATUS/MY TO DO list on the main screen, click on the blue CERT tab.

Click on the CERT tab
3. Selecting an Effort form to certify effort

To directly access the effort reports requiring your certification, click the link under *Pending Certification* in the STATUS/MY TO DO table. This link will take you to the individual report(s) ready for certification.
4. Name pick list

The following screen displays the individual(s) whose effort report has been pre-reviewed by the business administrator and is now ready for you to certify. Click the name to start.
5. Certifying the Effort form

Enter the percentage of effort for the work performed per account. The adjusted % distributions, including required or planned cost sharing %, are completed by the administrator and the results are displayed under “Total %”. Review the percentage of the Certified Effort. The total should net to 100%. Enter your comments in the Notes field as needed. Your notes will be displayed on the certified effort report as part of the audit trail. Click the Proceed button to continue after reviewing your input.

Starting 1Q2009, PS chart strings will be displayed on the Effort form instead of CUFs numbers. To review the details of a sponsored project (i.e. award title), click on the link of the PS chart string.

<table>
<thead>
<tr>
<th>Plan</th>
<th>Accounts</th>
<th>Payroll %</th>
<th>Cost Sharing %</th>
<th>Total %</th>
<th>Certified Effort %</th>
</tr>
</thead>
<tbody>
<tr>
<td>30%</td>
<td>610-629999-0012345</td>
<td>CHEMO RESEARCH</td>
<td>29%</td>
<td>1%</td>
<td>30%</td>
</tr>
<tr>
<td>20%</td>
<td>610-6291324-6005959</td>
<td>STEM CELL RESEARCH</td>
<td>23%</td>
<td>0%</td>
<td>23%</td>
</tr>
<tr>
<td>5%</td>
<td>650-528000-6001627</td>
<td>SLEEP DRUG STUDY</td>
<td>8%</td>
<td>0%</td>
<td>8%</td>
</tr>
<tr>
<td>67%</td>
<td>Total Sponsored Accounts:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Non-Sponsored Accounts</th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>103-123434 &amp; 710-123567-99991234</td>
<td>DEPT ACCT</td>
<td>11%</td>
<td>1%</td>
<td>10%</td>
<td>10%</td>
</tr>
<tr>
<td>0%</td>
<td>Total Non-Sponsored Accounts:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>33% Unassigned Effort</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>33%</td>
</tr>
<tr>
<td>100%</td>
<td>Grand Total:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Notes

If changes are made to this form, please select Proceed or Save Form to preserve the changes.

Please determine if the percentages are correct. If they are not correct, select the Notify button to notify your Pre Reviewer. If the percentages are correct, click on Proceed button to continue.

Adjusted % distributions completed by the Business admin .

Enter the effort under Certified Effort %. The total should net to 100%.

Click on the link to review the sponsored project details.
6. University (Non-sponsored) activities

The following screen will be displayed if you have effort on non-sponsored accounts. The sum of non-sponsored (university activity) effort should be further distributed per the university activity. Enter the effort percentages among the seven university activities. The total effort should be the same as the sum of total non-sponsored (university activity) effort. Click the Proceed button when you are finished.

Total non-sponsored (university activity) effort

Enter effort distribution among the seven activities

Click any of the links to see the definitions of the university activities

Enter positive integers only for the following fields

If this is correct, please distribute 33% among the following. If a percentage is already present, the PreRevisor has already populated the fields. Please verify that the correct percentages were entered. Click Proceed to certify your effort or Cancel to return to the Effort Form. For more information click Help.

Enter effort distribution among the seven activities
7. Attesting to your Effort certification

Click the **Certify** button to complete the certification. If the information does not reflect your Effort, do not certify the report. Click the **Notify** link to email your Effort Administrator.

If the certified Effort %s are the same as the %s under “Total %”, the Effort form does not require additional reconciliation by the administrator in Post Review. If the %s are different, ERS will send an auto email to the administrator and notify him/her that the Effort form requires reconciliation.

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**Attestation statement**

I certify that the allocations of activity for the individual shown above is a fair representation of the period noted.
8. Certified Effort form

The certified effort statement is displayed on the final certification screen as shown below. If you have finished certifying all of the effort reports for this reporting period, click the Exit Form button. To certify effort for other individuals you are responsible, click Next Form or Previous Form to continue.

9. Updated Certification status

The Certification flag has been updated to “Y”. Click on “Return to Home” to go back to the main screen or click on “Log Off” on the top navigation bar to exit the system.