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. Log In to ERS
   Go to [https://ers.northwestern.edu](https://ers.northwestern.edu) and log in with your NetID and password. Please note: VPN is required to access ERS from an off campus location. If you are on campus, VPN is not required.
   - Instructions for installing Northwestern VPN are available here: [https://www.it.northwestern.edu/oncampus/vpn/](https://www.it.northwestern.edu/oncampus/vpn/). If you need to access ERS offsite but are having trouble installing or connecting to VPN, please contact your department’s IT staff or Northwestern IT (NUIT) for assistance.
   - For NetID assistance (if you don’t know NetID or password, or your NetID is inactive), please call the (NUIT) help desk (847-491-4357)

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.

![Select an Effort Report to Certify](image)

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.”

![Confirm % Effort per Chart String](image)
5. **Complete the Institutionally Funded Accounts Summary *(if applicable)*

If you entered effort on non-sponsored (university & clinical) chart strings, further distribute this effort among the seven categories listed. The total should equal the sum of non-sponsored effort entered in the previous screen. Click “Proceed” when finished.

6. **Finalize Certification**

Review the summary of Certified Effort % per chart string + institutional summary and notes if applicable. If all is complete & correct, click “Certify” to attest to and finalize the certification.
7. Exit The Report to Return to Worklist

- 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.

8. View Worklist Status

- 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.