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](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](mailto:consultant@northwestern.edu) or 847-491-3457.

![ERS Login Page](image1)

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.

![ERS Pending Certification](image2)
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.

![Effort Reporting System](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.”
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.

If the finalized effort % per chart string includes corrections to your administrator’s pre-review estimates, or you have added or modified notes, 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.

6. **Exit The Report to Return to Worklist**

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.

If desired, print certified report or save as PDF.
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.
**Bulk Certification**

The Bulk Certification feature allows certifiers to review and certify multiple effort reports using a condensed workflow process.

Certifiers are still required to review and attest to all reports selected for bulk certification, but multiple reports are displayed on a single screen. After reviewing each report, updating %s and notes if appropriate, and confirming that each was reviewed (using a checkbox), the certifier can certify all reviewed reports with one click.

**Please Note:** “Add Account” is not available in Bulk Certification; for any reports that you need to add a chart string to, use the “Certify Single Form” workflow.

Bulk Certification workflow is optional; Certifiers may choose to complete workflow for each report individually instead (“Certify Single Form”).

1. **Select Effort Reports to Bulk Certify**
   - After accessing your list of reports to certify (see steps 1 & 2 from the beginning of this guide), click Certify Multiple Forms.
   - Select the reports you wish to bulk certify by clicking the checkbox next to each name.
   - **If you decide not to bulk certify after all, click “Certify Single Form” to revert back to the individual workflow screen.**
   - Click Proceed.
2. Confirm Review for Each Report
   - After selecting reports to bulk certify and clicking proceed, the next screen displays each report with employee details (Name, ID, Title), reporting period, and pre review totals (pre-loaded).
   - Click \( \text{View Pre Review Details} \) or \( \text{View Previously Certified Effort Reports} \) to view previously certified effort reports.
   - If edits to pre review totals are appropriate, in the Certified Effort % column, click the % by each chart string requiring edit to enter an updated total. You may also add or edit notes (not required), which will be displayed on the certified report(s) as part of the audit trail.
   - For each report reviewed, the Certifier must select the check box beneath it (“I have reviewed the above Effort Form”) to confirm that it was individually reviewed. Unselected reports will not be included in the bulk certification.
   - After confirming review for all reports, click Proceed.
3. Finalize Bulk Certification
   - For each report, 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 certifications.

   **Click “Certify” to complete certifications**

   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.

4. Exit Bulk Certification to Return to Worklist

   If desired, print bulk certified reports or save as PDF.

   The certified effort reports are displayed on the final screen with your name and date stamp.

   Click “Exit” if all certifications are accurate and final, or Make Changes if you made a mistake and need to correct one or more reports.
5. **View Worklist Status**

- After clicking “Exit” at the bottom of the completed bulk certification, you will return to your certification worklist, which displays the certified status for each report you certified. If you have additional reports to certify, select reports to bulk certify, or click the “Certify Single Form” button to select a report for individual workflow.

- 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 Forms Pending Certification (Q2019)](image-url)