



Instructions for Certifying Effort Forms using the Effort Reporting System (ERS)

CERTIFIERS

Log on:

<https://ers.tcs.tulane.edu>

Getting Started (2 options):

Option 1 – Status/My To Do List

1. Select the numeric link under Certification “Pending” for the Current or Delinquent Reporting Periods.
2. Any forms listed under “Effort Forms Pending Certification for the Current Reporting Period” are ready to be certified. The Certifier will see the Name, Reporting Code, Sub Department, Title, and the Pre Review, Certify, and Post Review Status. A “Y” flag will be present in the Pre Review status column. An “N” flag under the Certified Status column indicates the form has not been certified and an “N (saved)” indicates the form has been viewed, but not certified.
3. Select the effort form to Certify by clicking on the employee’s name.

Proceed to Step 5 below

Option 2 – Menu Options on the left of the screen

1. Click the “Certify” menu option.
2. Click the “Certify” link on the next screen.
3. Select the effort reporting period by clicking the link for that period. Note that you can access prior periods as well as the current period.
4. Any forms listed under “Effort Forms available to Certify” section are ready to be certified. A “Y” flag in the “Certified” column indicates if a form has been certified already. An “N” flag indicates the form has not been certified and an “N (saved)” indicates the form has been viewed, but not certified. Click on the name of the employee you are certifying to access the effort form. You may only access forms in the “Effort Forms available to Certify” section.
5. Review the effort form and effort percentages for every account, update the percentages if necessary, then click the “Proceed” button. The system will notify you of any errors. You may also notify the Pre Reviewer who completed the Pre Review by clicking the “Notify” button at the bottom of the screen.
6. Review the summary to be certain it represents your efforts for the entire reporting period. If it is correct, read the attestation statement and click the “Certify” button. Otherwise click “Notify” below the attestation statement to send an e-mail to your administrator and/or to exit the form without certifying, click on the “Exit Form” button.
7. You will come to a summary screen. After certifying, you can print a copy of the final summary for your records using the “Print Form” button.
8. Click the “Exit Form” button to exit.