Effort Reporting System (ERS) Department Coordinator (DC) Guide



## Effort Reporting System (ERS) <u>Departmental Coordinator Guide</u>

Log on:

### Username: Individual MySlice User ID Password: MySlice Password

The following options are available (left-hand side):

## (1) Assignments

#### **Changing Assignments**

During the effort reporting process, you have the ability to change Sub Department Coordinator(s), or Pre Reviewer for an entire sub department. Alternatively, you may have the ability to change the Pre Reviewer or Certifier for an individual(s) or assign individual(s) to another sub department. Each of the situations is described below.

#### Changing Assignments for Department and Sub Departments

- 1. Click the "Assignment" menu option.
- 2. Select "Change Assignments for Department or Sub Departments".
- 3. Select a Department or Sub Department for which you will change assignments. Click the "Proceed" button.
- 4. Follow the directions listed below (a or b) for the assignment you choose to change.

#### (a) Changing Sub DC or Updating Sub DC rights (for Sub Department only):

- 1. Select the option to "Change Sub DC/Update Sub DC rights". Click the "Proceed" button.
- 2. ERS allows you to select a person from the list, which consists of everyone in your domain, or you can select to "Assign somebody not in your domain" using the link at the top of the page.
- 3. Select a person to be the new Sub DC and click the "Proceed" button.
- 4. Change the Sub DC Rights as applicable.
- 5. Click the "Apply" button on following screens to assign the new Sub DC and Sub DC rights.
- 6. On the summary screen, note the name of the new Sub DC and their current rights.

#### (b) Changing Pre Reviewer:

- 1. Select the option to "Change Sub Department Pre Reviewer". Click the "Proceed" button.
- 2. ERS allows you to select a person from the list, which consists of everyone in your domain, or you can select "Assign No Pre Reviewer" or "Assign somebody not in your domain" using the links at the top of the page.
- 3. Select a person to be the new Pre Reviewer and click the "Proceed" button.
- 4. Click the "Apply" button on following screens to assign the new Pre Reviewer.
- 5. The name of the new Pre Reviewer is displayed on the summary screen.

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#### **Changing Assignments for Individuals**

- 1. Click the "Assignment" menu option.
- 2. Select "Change Assignments for Individuals" if you intend to change the assignment for one individual or a group of individuals.

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- 3. Select a Department or Sub Department to search for the individual(s) for whom you will change assignments. Click the "Proceed" button.
- 4. Select the individual(s) for whom you will change assignments. Click the "Proceed" button.
- 5. Follow the directions listed below (a, b, or c) for the assignment you choose to change.

#### (a) Changing Pre Reviewer:

- 1. Select the option to "Change Pre Reviewer". Click the "Proceed" button.
- 2. ERS allows you to select a person from the list, which consists of everyone in your domain, or you can select "Assign No Pre Reviewer" or "Assign somebody not in your domain" using the links at the top of the page.
- 3. Select a person to be the new Pre Reviewer and click the "Proceed" button.
- 4. Click the "Apply" button on following screens to assign the new Pre Reviewer.
- 5. The name of the new Pre Reviewer is displayed on the summary screen.

#### (b) Changing Certifier (for Individual Assignments only):

- 1. Select the option to "Change Certifier". Click the "Proceed" button.
- 2. ERS allows you to select a person from the list, which consists of everyone in your domain, or "Assign somebody not in your domain" using the link at the top of the page.
- 3. Select a person to be the new Certifier and click the "Proceed" button.
- 4. Click the "Apply" button on following screens to assign the new Certifier.
- 5. The new Certifier's name is displayed on the summary screen.

#### (c) Assign to Another Sub Department (for Individual Assignments only):

- 1. After selecting the individual(s) to be assigned to another Sub Department, select the option to "Assign to a different Sub Department". Click the "Proceed" button.
- 2. Choose the correct department by clicking the icon to the left of the department; then click the link for the proper sub department to which you will assign the individual(s).
- 3. Click the "Apply" button on following screens to change the assignment of the individual(s) to a new sub department.
- 4. On the summary screen, note that the individual has been assigned to the new sub department.

#### (2) Notification

- 1. Click the "Notification" option on the left side menu bar.
- There are a series of predefined emails. You may choose one of the options or create your own email message using the General Email links. Note that the subject and bodies of all predefined emails can be edited.
- 3. Complete the email and click the "Send Email" button.
- 4. You will receive a confirmation that the email was sent.

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## (3) Pre Review

#### \*\* The Pre Review section is likely where the majority of your work in this system will be done. \*\*

#### Pre Review All vs. Pre Review:

Departmental Coordinators are able to pre review all forms in the sub departments to which they are assigned. As outlined in the Assignments section above, the Pre Review function can also be assigned for individuals or for sub departments to other coordinators. To pre review all forms within your domain, even those for which pre review has been assigned to someone else, select "Pre Review All". If you wish to only pre review the forms which are only assigned to you, select "Pre Review". Once a form has been released for certification to the Certifier and the certification is complete, only a summary screen may be viewed.

#### Getting Started – the following two options are available.

#### Option 1 – Status/My To Do List

- 1. Select the number link under Pre Review "Pending" for the Current or Delinquent Reporting Periods.
- 2. Any forms listed under "Effort Forms Pending Pre Review for the Current Reporting Period" are ready to be Pre Reviewed. The Pre Reviewer will see the Name, Reporting Code, Sub Department, Title, Certifier Name, and the Pre Review, Certify, and Post Review Status. While Post Review status will be displayed, it is not applicable for Syracuse University. An "N" under the Pre Review Status column indicates the form has not been Pre Reviewed and an "N (Saved)" indicates the form has been viewed, but not Pre Reviewed.
- 3. Select the effort form to pre review by clicking on the individual's name.

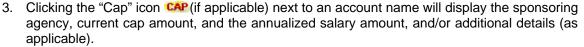
#### **Option 2** – Menu Options on the left of the screen

- 1. Select the Pre Review menu option.
- 2. Select the appropriate Pre Review option by clicking the link.
- 3. Select the effort reporting period by clicking the link for that period. The current period is listed at the top and is identified with an arrow. Note that you can access prior periods as well as the current period.
- 4. Select the Sub Department or Departments that you want to Pre Review by checking the appropriate box(s). You have the option to use a filter to retrieve forms that have been "Pre Reviewed" or "Not Pre Reviewed", as well as forms that have been "Certified" or "Not Certified". An "N" under the Pre Review Status column indicates the form has not been Pre Reviewed and an "N (saved)" indicates the form has been viewed, but not Pre Reviewed. Click the "Continue" button to execute the selection criteria.
- 5. Select the effort form to Pre Review by clicking on the individual's name.

#### Getting Familiar with the Form:

- 1. Clicking on a link in the payroll column will display the detail for each pay period for the account. Clicking on the total amount will display the payroll for all accounts listed on the form.
- 2. Clicking on the sponsored account number link will display the details of the account.

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- 4. A "CS" icon CS indicates that an account is a Cost Share Companion Account.
- 5. If the form you are pre reviewing has a memo pad icon next to the account, it indicates the account being pre reviewed is outside of your domain. You can click on the memo pad icon to view the details and/or any comments provided by the account owning department. The account owning department has the ability to view the entire effort form in read only mode. The owning department in "View Read Only" mode can provide comments by clicking on the pencil icon  $\swarrow$ . Refer to "View Read Only" mode on the following page for more information.
- To view prior effort statements for the selected individual, click the link "View Previously Certified Effort Statements".
- 7. Click the "Input as %" button to change to percentage mode, then click "Input as \$" button to return to dollar mode. You must be in dollar mode in order to use the "Proceed" button.
- 8. A "K" icon *K* indicates a Department of Health and Human Services K-Award. If applicable, the user will be able to identify Sub K-Award accounts (accounts related to the K-Award) by checking the check box next to the account number if a K-Award is present.

#### Making Changes to the Form:

- 1. To add an account that is missing to the form:
  - a. Click the "Add Account" button.
  - b. Select Sponsored/Non-Sponsored. Search for an account by entering all the search criteria. Click the "Continue" button.
  - c. Select an account from the Account drop down box, and then click the "Add Account" button.
- 2. Enter amounts to make cost transfers in the Cost Transfer input boxes.
- 3. You may enter a note in the Notes field describing any changes to the form, or recording any special circumstances.
- 4. Click the "Proceed" button to continue.
- 5. If amounts were entered in the cost transfer input boxes, you must also enter the applicable pay period dates for the transfer on the appropriate screen. The dates must be within the dates of the effort period you selected. You will be presented with all impacted payroll transactions during the time period selected. Define the transaction for the appropriate accounts and click 'Proceed'. A Cost Transfer Summary is presented.
- 6. To print a final summary for your records click the <sup>1</sup>/<sub>2</sub> or the <sup>1</sup>/<sub>2</sub> icons located in the upper right hand corner of the summary screen. Click the "Exit" button.

View Read Only Access – there are two options for View Read Only Access.

#### **Option 1** – Home Page Access

- 1. The number identified in the "Total...forms outside the home department" reflects the number of effort forms for the current reporting period which are "owned" by another department, but charged to your account(s).
- 2. To review these forms, select the number link in the "Total...forms outside the home department". Select the effort form to review by clicking on the individual's name.
- 3. In "View Read Only" mode you can provide comments related to the account by clicking on the pencil icon.

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An account's comments can then be viewed by the department responsible for pre reviewing the effort form. Also, you can notify the responsible department by email, by clicking on "Notify".

#### Option 2 – Menu Options on the left of the screen

- 1. Select the Pre Review menu option.
- 2. Select the View Read Only Effort Forms link.
- 3. Select the effort reporting period by clicking the link for that period. The current period is listed at the top and is identified with an arrow. Note that you can access prior periods as well as the current period.
- An "N" under the Pre Review Status column indicates the form has not been Pre Reviewed and an "N (saved)" indicates the form has been viewed, but not Pre Reviewed.
  Select the effect form to review by clicking on the individual's name
- 5. Select the effort form to review by clicking on the individual's name.
- 6. In "View Read Only" mode you can provide comments related to the account by clicking on the pencil icon. An account's comments can then be viewed by the department responsible for pre reviewing the effort form. Also, you can notify the responsible department by email, by clicking on "Notify".

## (4) Certify

As a Departmental Coordinator you typically are only responsible for certifying your own effort form. It is important that you consult your institution's policies and procedures if it is necessary to certify someone else's form. The default Certifier in ERS is the covered individual named on the effort form. To change the Certifier, you will need to assign the appropriate individual as the Certifier for that person. In order to access an effort form in Certify mode, the effort form must have been Pre Reviewed. The Certifier will be able to access the effort form through the Status/My To Do List or the Certify menu option.

Getting Started – the following two options are available.

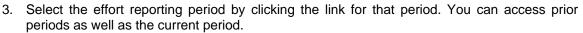
**Option 1** – Status/My To Do List

- 1. Select the number 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. While Post Review status will be displayed, it is not applicable for Syracuse University. A "Y" will be present in the Pre Review status column. An "N" 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 individual's name.
- 4. If Option 1 is used, 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.

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- 4. Any forms listed under "Effort Forms available to Certify" section are ready to be certified. A "Y" in the "Certified" column indicates a form has previously been certified. An "N" 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 individual whose form you wish to certify. You may only access forms in the "Effort Forms available to Certify" section.
- 5. Review the effort form and the default effort percentages. If there is a discrepancy on the form, such as an incorrect percentage of effort on a project or a missing project number, click the "Notify" button to send an email to your administrator.
- Review the certification summary to be certain it is correct. If correct, review the attestation statement and click the "Certify" button.
  If there are concerns in certifying the effort form, click the "Notify" link that appears below the attestation statement. To exit the form without certifying, click the "Exit Form" button.
- 7. To print a final summary for your records click the icons located in the upper right hand corner of the summary screen. Click the "Exit Form" button.

### (5) Reporting

- 1. Click the "Reporting" menu option.
- 2. Select a report using the link provided for the report.
- 3. Select the period to which the report should pertain.
- 4. Select the sub department(s) you want to see in the report. Click the "Continue" button.
- 5. You may print the report using your browser's print button or save the report as an Excel (xls) file or as an Adobe (pdf) file.

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