

Effort Reporting System Assignments Quick Guide

The Department Coordinator (DC) must ensure that the Sub-department coordinators (Sub DC), Pre-Reviewers and Certifiers assigned are appropriate. Use this Quick Guide for the following assignments:

1. Assign Graduate Students and other staff Effort (Post doctorates, and other similar positions) forms to a PI for Certification by Project.
2. Assign or change a Sub-Department Coordinator.
3. Assign or change a Pre-Reviewer.
4. Change Individual Assignments.

1. Assign Graduate Students and other staff (Post doctorates, and other similar positions) Effort Forms to a PI for Certification by Project.

Per the University's Effort Reporting Policy, certification of effort and the allocation of effort must be completed by the individual faculty, staff or graduate student performing the effort; however, Principal Investigators (PI/Co-PI) may certify for the staff working on their sponsored projects (graduate students, post-doctoral associates, and other similar positions). **If the department has chosen Project Certification, the DC/sub DC/ pre-reviewer must "Enable Line Items forms" for these associates prior to pre- review. The PIs will not be assigned as certifiers till the Line Item Assignment process is enabled.**

To Enable Line Item for the Graduate students and other staff:

- Select Management
- Select Assignment
- Select Change Assignments for Individuals

Assignments

- To assign Sub DC, Pre Reviewer, or Post Reviewer for the entire Department or a Sub Department, click on:
 - [Change Assignments for Department or Sub Departments](#)
- To change assignments for individual(s), click on:
 - [Change Assignments for Individuals](#)

- Select your department

Change Assignments for Individuals

[Check All](#)
Select Department
[Clear All](#)

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Selection	Department	Department Name
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input checked="" type="checkbox"/>	0104	Electrical and ComputerEngineering

[Proceed](#)

This lists all individuals in your domain (departments/sub departments)

- Select the Status dropdown menu and Select "Eligible for PI line item". This should list Graduate students and staff eligible for Line Item certification.
- Select these employees - select proceed
- Select Enable selected forms as line item forms – Select proceed

Change Individual Assignments

You have selected to change the assignment setting for the following employees

If this is correct, select the option and click **Proceed**. If this is not correct, please click **Back** to select other employees.

Employee Name	Sub Department	Pre Reviewer	Certifier	Post Reviewer	Alternate Sub Dept
	010400				

You have following rights to change the assignment settings for the above individuals. Please select an appropriate option to continue:

- Change Pre Reviewer.
- Change Certifier.
- Assign to a different Sub Department.
- Move back to original Sub Department.
- Enable Selected Forms as Line Item Forms

[Back](#) [Proceed](#)

Now the PIs will be able to certify for the staff working on their projects.

2. Assign or Change a Sub-Department Coordinator.

The Department Coordinator (DC) has access to change assignments for department or sub departments and can also change assignments for individuals.

To Add Sub Department Coordinator:

- Select Management
- Select Assignments
- Go to Change Assignments for Department or Sub Departments

Assignments

- To assign Sub DC, Pre Reviewer, or Post Reviewer for the entire Department or a Sub Department, click on:

[Change Assignments for Department or Sub Departments](#)
- To change assignments for individual(s), click on:

[Change Assignments for Individuals](#)

- Select a sub department - Select Proceed

Change Sub Department Assignments

You are in charge of the following sub department(s). Please select from the following list and click **Proceed** to continue with the Assignments process.

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Sub Department Assignments					Sub DC Rights		
Select Sub Department	Sub DC	Pre Reviewer	Post Reviewer	Allow No Pre Review	Edit Pre Reviewer	Edit Certifier	Edit Post Reviewer
<input type="checkbox"/>							
<input type="radio"/> 010400				Y	Y	Y	Y
<input type="radio"/> 010404				Y	Y	Y	Y
<input checked="" type="radio"/> 010405				Y	Y	Y	Y
<input type="radio"/> 010406				Y	Y	Y	Y
<input type="radio"/> 010407				Y	Y	Y	Y
<input type="radio"/> 010410				Y	Y	Y	Y
<input type="radio"/> 010411				Y	Y	Y	Y

Select Add Sub DC. Select Proceed

You have following options to adjust current Sub Department Assignments. Please select an appropriate option to continue:

- Add SubDC
- Remove Selected SubDC(s)
- Replace SubDC(s)
- Update SubDC Rights For 010405.
- Change Sub Department Pre Reviewer For 010405.

- Select the sub DC you want to select

Change Sub Department Assignments

You have selected the option - Add a SubDC for Sub Department: 010405

To Add a Sub DC, you may choose one from the following options:

- [Assign somebody not in your domain](#), or
- Assign somebody from the following list:

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	Employee Name	Sub Department
<input type="radio"/>	[REDACTED]	010400
<input type="radio"/>	[REDACTED]	010400
<input type="radio"/>	[REDACTED]	010400
<input checked="" type="radio"/>	[REDACTED]	010400
<input type="radio"/>	[REDACTED]	010400
<input type="radio"/>	[REDACTED]	010400
<input type="radio"/>	[REDACTED]	010400
<input type="radio"/>	[REDACTED]	010400
<input type="radio"/>	[REDACTED]	010400
<input type="radio"/>	[REDACTED]	010400
<input type="radio"/>	[REDACTED]	010400
<input type="radio"/>	[REDACTED]	010400

- Click on Proceed

Change Sub Department Assignments

Add Sub DC For Sub Department 010405 - Photonics Laboratory

Sub Department:	010405 - Photonics Laboratory
Add Sub DC:	[REDACTED]
Current Role for [REDACTED]	Certifier
Role for [REDACTED] after assignment will be:	Sub DC

If the above information is correct, please click **Apply** to apply the change and proceed. To select another employee, click **Back**.

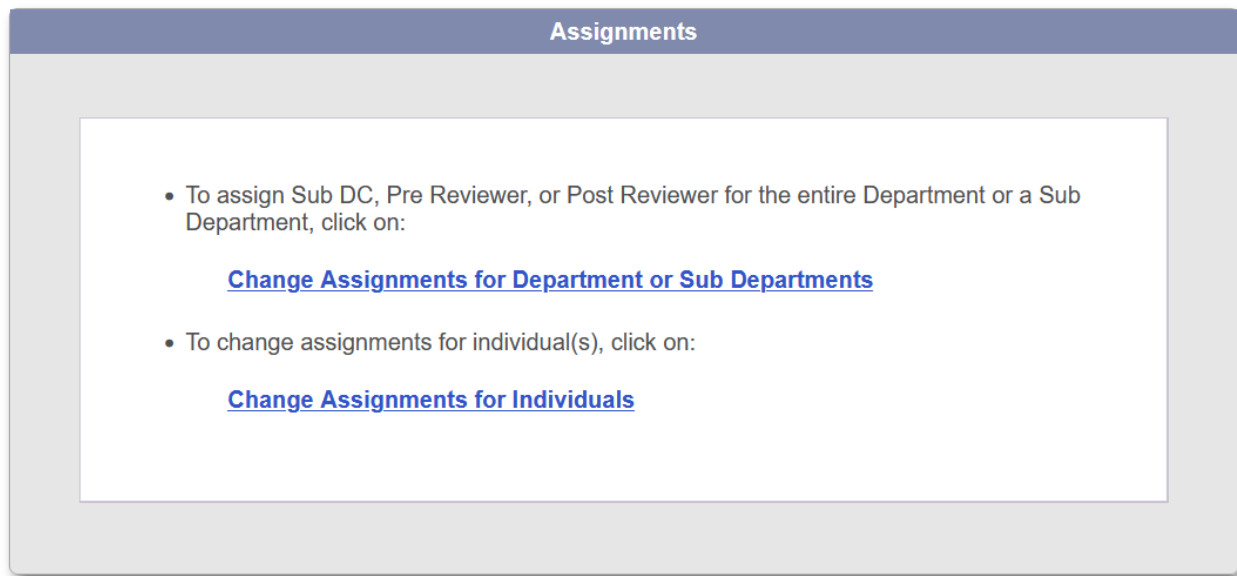
- Select Apply

3. Assign or change a Pre-Reviewer:

Follow the same steps as above, but select the option for Sub-Department Pre-Reviewer.

4. Change individuals in the assigned department/sub department:

- Select Management
- Select Assignments



- Select the department – Select Proceed
- Select a sub-department

Change Assignments for Individuals

Select Sub Department(s)

[Check All](#)

[Clear All](#)

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Selection	Sub Department	Sub Department Name
<input type="checkbox"/>		
<input type="checkbox"/>	010400	Electrical and Computer Engineering
<input type="checkbox"/>	010404	CESCA
<input type="checkbox"/>	010405	Photonics Laboratory
<input type="checkbox"/>	010406	Wireless @ VT
<input type="checkbox"/>	010407	ECE Clean Room
<input checked="" type="checkbox"/>	010410	Center for Space Research
<input type="checkbox"/>	010411	Hume-Natl Security & Technology

Back

Proceed

- Select the individual you need to make a change – Select on proceed

Change Individual Assignments

Please select the employees you wish to update and click Proceed to continue the individual assignment

[Check All](#)

[Clear All](#)

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	Employee Name	Sub Department	Title Code	Pre Reviewer	Certifier	Post Reviewer	Alternate Sub Dept	Status
								[All]
<input type="checkbox"/>		010400	01212406					
<input type="checkbox"/>		010400	01126712					
<input type="checkbox"/>		010400	01126701					
<input checked="" type="checkbox"/>		010400	01301W00					

- Select Change a pre-reviewer

Change Individual Assignments

You have selected to change the assignment setting for the following employees

If this is correct, select the option and click **Proceed**. If this is not correct, please click **Back** to select other employees.

Employee Name	Sub Department	Pre Reviewer	Certifier	Post Reviewer	Alternate Sub Dept
	010400				

You have following rights to change the assignment settings for the above individuals. Please select an appropriate option to continue:

Change Pre Reviewer.

Change Certifier.

Assign to a different Sub Department.

Move back to original Sub Department.

Enable Selected Forms as Line Item Forms

- You can select a pre-reviewer for the list – Click proceed

Change Individual Assignments

You have selected the option - Change Pre Reviewer for the selected employees.

To change Pre Reviewer, you may choose one from the following options:

- [Assign No Pre Reviewer](#) (Certifiers can certify the forms without Pre Reviewer reviewing the forms), or
- [Assign somebody not in your domain](#), or
- Assign somebody from the following list:

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	Employee Name	Sub Department
<input checked="" type="radio"/>	[REDACTED]	010400
<input type="radio"/>	[REDACTED]	010400
<input type="radio"/>	[REDACTED]	010400
<input type="radio"/>	[REDACTED]	010400
<input type="radio"/>	[REDACTED]	010400
<input type="radio"/>	[REDACTED]	010400
<input type="radio"/>	[REDACTED]	010400

- Shows that you have changed a pre-reviewer for a certain individual - Select Apply

Change Individual Assignments

You have selected Abaid, Nicole to be the Pre Reviewer for following employees:

Employee Name	Sub Department
[REDACTED]	010400

Role Adjustment for Abaid, Nicole

Current Role for [REDACTED]:	No Role in ERS
Role for [REDACTED] after assignment will be:	Pre Reviewer

To select another employee, click **Back**.

- You can select a pre-reviewer who is also not in your Domain (department), if the GRA is in your dept. but he worked on the fund where the PI is in another department (click on top – Assign somebody not in your domain).
- Enter the name of the person (pre-reviewer) in that dept. or the department number and select the pre-reviewer – select Proceed and then Apply.

- You can also select not to have a pre-reviewer (click on top Click Assign No Pre-Reviewer).

Note: Department Coordinator or a Pre- Reviewer cannot change a Certifier in ERS. If a certifier needs to be changed (because the employee left the university or is out on extended sick leave), please send an email at ERS@vt.edu. Office of Sponsored Programs Compliance team (Central Administrator) can change a Certifier.