

Effort Reporting System Frequently Asked Questions

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Research Accounting Services**FREQUENTLY ASKED QUESTIONS****1. What is my User ID and password to logon to ERS?**

You can log on to ERS by using your AccessNet User ID and password. This logon is the same as the logon for the Temple Portal. If you cannot remember your AccessNet User ID and/or password, you will have to contact the Computer Services Help Desk at extension #1-8000.

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2. I am on a Temple campus and ERS won't allow me to logon?

In order to logon to ERS you must use your AccessNet User ID and password. If you have made 5 attempts to logon and were not using the correct User ID and password, the ERS system will lock you out. In order to correct this, you will need to contact the Computer Services Help Desk at extension #1-8000.

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3. I am not currently at a Temple campus location, why can't I logon?

For security reasons, ERS is not directly accessible from non-Temple locations (i.e. home) without a Virtual Private Network or VPN connection. A VPN connection provides a layer of security when accessing ERS.

Computer Services has made available as of June 2008 a clientless Virtual Private Network (VPN) connection. You, as the user, do not need to sign up for this access, but can simply go to the following website:

<http://cherry.temple.edu>

If this is your first time accessing this site, please download the Citrix Online Plugin for either Windows or Mac. Once you access the site, simply login using your AccessNet User ID and password then select the ERS Effort Reporting link. You will then be taken to the ERS logon page where you should logon using the same AccessNet User ID and password. Currently, ERS is the only Temple application that is accessible using this type of VPN connection.

If you already have a VPN account which uses the Nortel Contivity client software you can continue to use that VPN connection to connect to ERS. When using this method, you would first need connect to the Temple network using the secured VPN connection and then open your browser to and go to the ERS logon page (<http://ers.temple.edu>).

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Research Accounting Services**FREQUENTLY ASKED QUESTIONS****4. How can I gain access to ERS from home?**

There are two methods of accessing ERS from home. The first method is by using the remote Virtual Private Network (VPN) connection provided to all full and part-time faculty and staff. This method of access does not require any paperwork to sign up. You may take advantage of this secure connection to ERS by going to the following website:

<http://cherry.temple.edu>

Once you access the site, simply login using your AccessNet User ID and password then select the ERS Effort Reporting link. You will then be taken to the ERS logon page where you should logon using the same AccessNet User ID and password.

The second method of accessing ERS is by obtaining a Virtual Private Network (VPN) account using the Nortel Contivity client software. In order to obtain the VPN account and related software you must complete a form for submission to Telecommunications. It takes approximately 2 weeks to get the account set up. However, this type of VPN connection will enable you to securely access many of the Temple systems vs. the first method which currently only allows the access to ERS. This method also requires that the Nortel Contivity software be loaded on each computer that you plan to remotely access ERS from.

The following are instructions to obtain a VPN account using the Nortel Contivity software:

- 1) Go to the Computer Services home page: <http://www.temple.edu/cs>
- 2) Click on the "Offices" link on the red bar.
- 3) Scroll down to the "Telecommunications" link.
- 4) In the aqua column on the left, click on "Forms".
- 5) Scroll down to the "Customer Service Order Request".
<http://www.temple.edu/cs/telecommunications/forms/CSO.xls>
- 6) Print the form and cross off the heading and write in "VPN Account Request".
- 7) Fill out the form as much as possible and fax the form to the phone number listed at the bottom of the form.

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5. Who is required to have a certified Effort Report?

All employees who have salaries that are being charged to a sponsored project or who have effort on a sponsored project are required to complete effort reports. Effort reports are automatically generated for individuals who have had salary charged to a sponsored agreement during the quarter or semester.

In addition to the above, employees at the School of Medicine who have salary being charged to Funds ending in 4XX, are required to certify their effort for Medicare purposes. These individuals are typically involved in the teaching of residents and must certify the time spent during the quarter in those efforts as well as for any efforts involving sponsored projects.

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FREQUENTLY ASKED QUESTIONS

6. What account codes are considered a part of Institutional Based Salary (IBS)?

Institutional Based Salary is the annual compensation paid by an organization for an employee's appointment, whether that individual's time is spent on research, teaching, patient care, or other activities. The University has defined IBS as follows:

<u>Activity</u>	<u>Considered IBS</u>	<u>Not Considered IBS</u>
Sponsored Research	X	
Teaching & Service	X	
Administration	X	
Clinical (Part A & B)	X	
Guaranteed Bonuses	X	
One-Time Bonuses (Part C)		X
External Consulting		X
Other Incidental Pay		X

IBS Account Codes

60XX	Includes full-time faculty and clinical practice
6106	Graduate/T.A.
6201, 6204 and 6205	Part-time faculty including Ambler and TUCC
6203	Summer Pay
63XX	Graduate research assistants, fellows and post-doctoral
65XX (except 6555)	Professional and Administrative Staff
6660	Visiting Research Scholar

Non-IBS Account Codes

6202, 6260	Faculty Overload
6280	Chairperson-Stipend
6296	Faculty one-time supplements
66XX (except 6660)	Overload, Consulting, Allowances and Misc
6730	Incentive Compensation
6735	B-Component
6740	Voluntary Early Retirement Supplement

Note: Student workers (6700-6702) will be excluded from effort reporting since time cards satisfy their effort reporting requirements.

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7. What sponsored accounts show up automatically in an individual's Effort Report?

The effort report will reflect any salaries posted to the sponsored account during the period that the effort report covers. Changes made using an Expense Distribution Form (EDF) will only be reflected if the form was processed during the period that the effort report covers. If the EDF was not submitted timely adjustments should be made to the effort report to reflect the proper allocation of effort.

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Research Accounting Services**FREQUENTLY ASKED QUESTIONS****8. Why is there more effort reports generated during the 2nd and 4th quarters than during the 1st and 3rd quarters?**

Most effort reports for the University community are completed quarterly, with the exception of faculty at the Main Campus. Faculty at the Main Campus will certify their effort "semesterly" in six month increments of December and June.

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9. What does term 'After-the-Fact Certification' entail?

Temple University utilizes the "After-the-Fact" Certification method to certify effort on sponsored agreements. This method recognizes that costs distributed represent **actual costs**.

- Direct cost activities and F&A (facilities and administrative or indirect) cost activities may be confirmed by responsible persons with **suitable means of verification** that the work was performed;
- The payroll distribution system will allow confirmation of activity allocable to **each sponsored agreement** and each of the categories of activity needed to identify F&A costs and the functions to which they are allocable;
- Direct charges may be made initially to sponsored agreements on the basis of estimates made before services are performed. When such estimates are used, **significant changes** in the corresponding work activity must be identified and entered into the payroll distribution system.

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10. What does the term 'first hand knowledge' describe?

First hand knowledge is having direct knowledge of the activities of an employee. Those having direct knowledge include the employee, the principal investigator and the employee's supervisor.

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Research Accounting Services**FREQUENTLY ASKED QUESTIONS****11. What should the comments section of the effort report be used for?**

Comments written into the effort report will become a permanent part of the effort report and cannot be deleted. These comments can be reviewed by auditors and should only be used to clarify or provide additional explanations or details relating to the effort report.

For example, an individual may receive salary support from NIH 'K' award which allows for effort on other projects to count towards the commitment on the 'K' award. In this example, the effort report can show the effort allocated to the 'K' award and the comments can indicate the specific sponsored projects on which the individual worked.

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12. The employee/certifier indicated that they certified their effort report, but the certification date is not showing up on my department's list of effort reports – why?

Check with the employee to make sure that they didn't just save the report. Once in the initial effort report, the employee needs to "Proceed" to the certification page and click "Certify" inside the yellow box with the certification statement. Only then is the report considered completed.

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13. Whose Effort Reports are faculty members responsible for certifying?

Faculty/PIs are responsible for certifying their own Effort Reports and those of the graduate students and post-docs that have been assigned to them (i.e., those working on the faculty member's grant(s).)

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14. How does effort certification for graduate students work?

Graduate students' effort reports are intended to only capture their effort related to sponsored research, not sponsored training activity. The sponsored research activity that they perform becomes the basis for 100% of their effort. Effort/time spent on classroom activities (i.e., studying, time spent in class, and Teaching Assistant activities) is not included. Training grant activities are also not included.

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15. Why aren't all the graduate students in my department listed?

If a graduate student did not receive pay from a sponsored program, the system will not generate an effort report for that student. If a graduate student did receive sponsored pay and no effort report has been generated, please contact the Office of Cost Analysis and they will look into the reasons and if necessary create an effort form for that individual.

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Research Accounting Services**FREQUENTLY ASKED QUESTIONS****16. How do I change the certifier to someone else in ERS?**

Anyone who has the role of Department Coordinator (DC) or Sub-Department Coordinator (SUBDC) in ERS has the ability to change the certifier from one person to another. If you have this access in the system the ERS menu on the left side of the screen will give you a tab called "Assignments". Once you click on that menu it will give the ability to change individuals' roles in the system.

Department Coordinators (DC) and Sub-Department Coordinators (SUBDC) can also change who can pre and post review an effort form, should they wish to delegate these duties. Department Coordinators (DC) can also create multiple Sub-Department Coordinators.

If you need to make a change and don't have access to this feature in the system or are not comfortable making the change yourself, please contact the Office of Cost Analysis at via email ers@temple.edu with the changes you would like made and we will make the change for you.

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If you have any additional questions or concerns, please feel free to contact the following members of Research Accounting Services:

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