

EFFORT REPORTING SYSTEM (ERS) TRAINING FLOW

The following training session will be a step-by-step review of the effort certification process using ERS. This training session will explain a number of roles including the Department Coordinator (DC), Pre Reviewer, Certifier and Post Reviewer roles. Although you may not be responsible for performing all of these roles, it is important to understand the activities associated with each of the ERS roles involved in the effort certification process. During the training, you will assume a number of different roles within ERS to become familiar with the entire process.

The first role we will examine is that of the Departmental Coordinator (DC). Typically this person will be the department budget manager and/or business administrator. The DC may assign roles (both Sub Department default roles and assignments of individual effort reports). The DC can also Pre Review and Post Review effort forms and generate management reports for an entire department. The SubDC will mainly perform the Pre Review and Post Review function of effort forms for their ERS Sub Department(s). Lastly, the SubDC can also generate management reports Sub Department(s).

During this training session, we kindly ask that you not work ahead of the instructor.

The MAXIMUS instructor will explain the scenario first, followed by a screen-by-screen instruction, walking you through the scenarios from start to finish while instructing you when to click, read, observe or watch a demonstration overhead. You are encouraged to ask questions throughout the training session as well as notifying the closest training assistant or the instructor if you are experiencing technical difficulties. There will also be opportunities for you to participate in the discussion about effort reporting best practices although it is assumed that you have previously been instructed regarding the policies, procedures and practices of the University.

This training document will serve as an ongoing resource to refer back to when University of Houston operates ERS in a live environment. You are encouraged to use this as a reference manual.

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Logging onto ERS

For this training, you will be logging on through a URL for a training site especially established for today's training. This will **not** be used for future log ons outside of this training session.

HOUSTON	
User ID:	
Password:	Effort
Login	ERS CITOR
ERS Help Desk	
phone (xxx) 555-1000 email ershelpdesk@maximus.com	

A. Log on to the system as the Departmental Coordinator Grant Adams using your USERID 111111XXX and your Password temp (all lower case, no quotations).



SECURITY: You are about to view personal information. Your information will be protected by encryption as it travels across the web. To continue to protect the privacy of your information, you should completely exit your browser before you leave your computer. If you do not exit completely, the browser's caching capabilities may enable the next person using your computer to view your personal information. B. The MAXIMUS instructor will guide you through the home page, navigation bar, and side panel options as well as describe the center graphic, statistics and *Status/My To Do* table. Please watch the overhead presentation. The MAXIMUS instructor will instruct you when to click options on your computer.

UNIVERSITY of HOUSTON	Certification							
		Home	e My I	Profile	Tutorial	Help -	About	Log Off
CERT	Departmental Coordinator							
	Grant Adams						Your Assigne	ed <u>Departments</u> .
Assignment								
Notification		Effort For	n Status					
Pre Review		Completion Status: 0% for Curren	t Reporting	Period - 0531	115			
Certify								
Post Review	Total <u>0 out of 4</u> forms complet	ted; <u>4</u> pending Pre Review; <u>0</u> pending (Certification; 0	pending Post	Review, 1 from F	Prior Periods.		
Reporting								
	-	My Status	/ To Do					
			Pre R	eview	(
			Pending	Critical				
		Current Period (053115)	1	3				
		Prior Periods	1	0				
	Search Employee Effor	t Forms	-	Search I	Employee Eff	ort Forms B	y Account	
		(Courts)	Account Id					
	Employee Id	Search						Search
								-

Scenario # 1: CHANGING CERTIFIER ASSIGNMENTS

• Designate Jennifer Evans' effort form as Line Item Effort Form

In this scenario, Grant Adams as the DC will designate Jennifer Evans' effort form as Line Item Effort Form to allow Principal Investigators (Karen Davis B and Michael Ford) to certify Jennifer's effort expended on their project. Jennifer will no longer be able certify her form.

A. Click on **Assignment** from the left-hand menu.

		Home	e MyF	rofile	Tutorial	Help -	About	ļ
CERT	Departmental Coordin	nator						
	Grant Adams						Your Assigne	ed D
Assignment								
Notification	-	Effort For	n Status					
Pre Review		Completion Status: 0% for Currer	nt Reporting P	eriod - 05311	15			
Certify								
Post Review	l otal <u>o out (</u>	or 4 forms completed; 4 pending Pre Review; 0 pending (Sertification; Of	ending Post r	Keview, 1 from F	mor Periods.		
Reporting								
		My Status	/ To Do					
			Pre R	view				
			Pending	Critical				
		Current Period (053115)	1	3				
			1	0				
		Prior Periods						
		Prior Periods	· · · ·					
	- Search Er	Prior Periods	_	Search E	mployee Effe	ort Forms B	y Account	

B. Click on the *Change Assignments for Individuals* hyperlink.

HOUSTON	Certification
	Home My Profile Tutorial Help - About Log Off
CERT	Assignments
Assignment	To assign Sub DC, Pre Reviewer, or Post Reviewer for the entire Department or a Sub Department, click on:
Notification	
Pre Review	I o change assignments for individual(s), click on:
Certify	Change Assignments for Individuals
Post Review	
Reporting	

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C. Select your Department and click Proceed.

UNIVERSITY of HOUSTON	Certification								
				Home	My Profile	Tutorial	Help -	About	Log Off
CERT			Change Assignme	ents for Individua	ls				
Assignment	1	Calaatiaa	Check All		<u>Clear All</u>				
Notification		Selection	HOXXX	DC DC	Fraining Departme	ent			
Pre Review			Pro	ceed					
Certify									
Post Review									
Reporting									

D. Select your Sub Department and click *Proceed*.

UNIVERSITY OF	Certification								
				Home	My Profile	Tutorial	Help -	About	Log Off
CERT			Change Assignments fo	or Individua	ls				
Assignment		Selection	Check All Sub Department	S	<u>Clear All</u> ub Department N	ame			
Notification			H0XXX	D	C Training Depart	ment			
Pre Review			(Back) (Proce	eed		_			
Certify									
Post Review									
Reporting									

E. Select Jennifer Evans and click Proceed.

				Horr	ne My Profile	Tutorial He	p v About	Loa
DT			Change	Individual Assignm	ents			
Assignment Notification	Please select the emp	oloyees you wish to update assignr Filter by All	e and click Proce nent	ed to continue the ind	lividual	New Employee Assigned to an Alt F Faculty P Eligible for PI Line T Terminated	ernate Sub Depa Item	tment
Pre Review			Check A	ll Cle	ear All			
Certify	Employee Name	Sub Department	Title Code	Pre Reviewer	Certifier	Post Reviewer	Alternate S	Sub Dep
Deat Deat	James Barnes F	H0XXX	1020	Grant Adams	James Barnes	Grant Adams		
Post Review	Jennifer Evans N P	HOXXX	T3D7	Grant Adams	Jennifer Evans	Grant Adams		
	Karen Davis 🔳 F	H0XXX	1010	Grant Adams	Karen Davis	Grant Adams		
Reporting					1		1	

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F. Select *Enable Selected Forms as Line Item Forms* for Jennifer Evans and click *Proceed.*

UNIVERSITY of HOUSTON	Certification								
				Home	My Profile	Tutorial	Help -	About	Log Off
CERT			Change Indivi	dual Assignments					
	You have selected to change	the assignment setting for t	he following employees	i.					
Assignment	If this is correct, select the opt	ion and click Proceed . If this	is not correct, please clic	k Back to select oth	er employees.				
Notification	Employee Name	Sub Department	Pre Reviewer	Certifier	Pos	t Reviewer	Alt	ernate Sub	Dept
	Jennifer Evans **	HOXXX	Grant Adams	Jennifer Evans	Grant Ada	ms			
Pre Review	** Line Item certification can be	e enabled for this individual.							
Certify	You have following rights to ch	ange the assignment settings	for the above individuals.	Please select an ap	propriate option to	o continue:			
Post Poviow	Change Pre R	eviewer.							
POSLINEVIEW	Change Certifi	er.							
Reporting	Change Post F	Reviewer.							
	Assign to a dif	ferent Sub Department.			/				
	Move back to	original Sub Department.		/					
	Enable Selecte	ed Forms as Line Item Forms							
			Back	Proceed					
/									-

G. Jennifer's sponsored accounts are displayed, along with Principal Investigators assigned. Click *Proceed*.



H. ERS presents the confirmation that Jennifer's effort form has been designated as line item form. Click *Exit*.



Scenario #2: PRE REVIEW OF THE EFFORT REPORT

When the Effort Reporting Central Administrator has generated effort reports for a new effort reporting period, an email is sent to Pre Reviewers informing them to begin reviewing effort reports. Pre Review can be completed by the Departmental Coordinator or Sub-Departmental Coordinator depending on the assignments or delegation of duties within each Sub-Department. The purpose of Pre Review is to ensure payroll charged and cost sharing align with the effort percentages expected for that individual. This is an important step prior to certification for correcting payroll distributions to align with the expected effort devoted. Ultimately, the Certifier will decide whether the results reasonably agree with the actual effort devoted.

Employee #1 – Jennifer Evans

Pre Review

A. ERS provides users with a dynamic Status / My To Do list that allows quick and easy access to the effort reports requiring action. Click on the "1" under Pre Review Pending in the Status/My To Do List, Current Period (053115).

UNIVERSITY of	Certification
	Home My Profile Tutorial Help - About Log Off
CERT	Departmental Coordinator
Assignment	Grafit Adams Your Assigned Lepartments.
Notification	Effort Form Status
Pre Review	Completion Status: 0% for Current Reporting Period - 053115
Certify	Total 0 out of 4 forme completed: 4 panding Dra Review: 0 panding Cartification: 0 panding Post Review: 1 form Prior Pariode
Post Review	Total <u>Court of H</u> indmis completed, <u>H</u> iperiality rie revealer, <u>B</u> iperiality defailation, <u>B</u> iperiality Post revealer. Those Periods.
Reporting	Mv Status / To Do
	Pre Review Pending Critical
	Current Period (053115) <u>1</u> <u>3</u>
	Prior Periods <u>1</u> 0
	Search Employee Effort Forms Search Employee Id Search Search Search Search

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© MAXIMUS, Inc. 2015 All rights reserved. No part of this publication may be reproduced, stored in a retrieval system, or transmitted, in any form or by any means, electronic, mechanical, photocopying, recording or otherwise without prior written permission of MAXIMUS, Inc. B. Select *Jennifer Evans* from the list of individuals. Jennifer Evans' form is going to be certified by multiple Principal Investigators, and is therefore, listed under the Line Item Effort Forms section.



C. Note that the form displays a message to alert the Department Coordinator (or the Pre Reviewer) that the form has been enabled for Line Item certification.ERS provides payroll detail to help you understand the amounts that are included in the Payroll column. Review the Effort Report and then click on "\$13,260.21" under the Payroll column to review the Payroll Details.

	Reporting Pe	University of Houston riod: 053115 (03/01/2015 - 05/31/201	5)				
		Pre Review Effort Form					
lame: Jennifer Evans	Employee ID: 888888001	Title: Resear	cher 2 Na	t Phys Science			
ubDept: H0XXX	Division: H0409	Title Code: T	3D7				
ew Previously Certified Effort State	ements						
	This Form	is Subject to Line Item Certification					
	Add Accou	Input as % Reset Form					
Commitment Pavrol				Cost Sharing		Total \$	Total %
communent rujion	Sponsored Accounts			cost shuning		rotar \$	Total 70
<u>\$6,630.08</u>	50% 00730-5013-H0288-B0001-G101915 (4847	5) ARITHMETICAL AND COG	\$	0.00	0%	\$6,630.08	50%
<u>\$784.02</u>	6% 00730-5013-H0288-B0001-G101970 (4826	4) USING LONGITUDINAL A	\$	0.00	0%	\$784.02	6%
\$7,414.10	56%	Total Sponsored Accounts		\$0.00	0%	\$7,414.10	56%
	Non-Sponsored Accounts						
<u>\$5,846.11</u>	44% 00730-2080-H0288-B1672-NA (32522)	TEJAS LEE TRAINING	\$	0.00	0%	\$5,846.11	44%
\$5,846.11	44%	Total Non-Sponsored Accounts		\$0.00	0%	\$5,846.11	44%
<u>\$13,260.21</u>	100%	Grand Total		\$0.00	0%	\$13,260.21	100%
		Notes				//	
		Maximum 800 characte	ers				
	Exit Form Initia	te CT Save Form Proceed	Help				

D. The following Payroll Details by Transaction report is presented by account by pay period. The accounts will be sorted in numerical order. The *Effort Payroll* column is the list of earnings used to derive the payroll percentages by dividing the sum of each account by the total Effort Payroll earnings column to arrive at percentages. If an individual has a 9month appointment, the Pre Amount will reflect the individual's amount paid, and the Payroll column will reflect the amount earned. ERS has a rounding routine to ensure total percentages do not fall short of or exceed 100%. At the bottom of the form is the option to export the form to Excel or PDF.

lame: Jennifer Evans iubDept: H0XXX				Reporting Period: (153115.0	13/01/2015	05/31/201	51									
IDD BL TIUAAA		Employee	1D: 8888	88001	CEALEAN		Title: Rese	harcher 2	Nat Phy	s Scier	ce						_
and a second second		CITABION.	10405				The Code	1301									
			Change	to All				Det	all By Mo	nth)	-						
Cost Center	Begin Date	End Date	Account Code	Job Title	Job Code	Position	Check Number	Pay Group	Earning Code	APPT	Pre Amount	DatePaid	Off Cycle?	Payroll	Non Effort Payroll	Effort Payroll	Effort Payrol
00730-5013-H0288-B0001-G101915 (48475)	03/01/2015	03/31/2015	50182	Researcher 2 Nat Phys Science	T3D7	1002688	8311219	HMO	10	12	1768.5	03/23/2015	N	\$1,768.50	\$0.00	\$1,768.50	
00730-5013-H0288-B0001-G101915 (48475)	03/01/2015	03/31/2015	50182	Researcher 2 Nat Phys Science	T3D7	1002688	8311219	HMO	150	12	87.69	03/23/2015	N	\$87.69	\$0.00	\$87.69	
00730-5013-H0288-B0001-G101915 (48475)	03/01/2015	03/31/2015	50182	Researcher 2 Nat Phys Science	T3D7	1002688	8311219	HMO	170	12	43.84	03/23/2015	N	\$43.84	\$0.00	\$43.84	
00730-5013-H0288-B0001-G101915 (48475)	03/01/2015	03/31/2015	50112	Researcher 2 Nat Phys Science	T3D7	1002688	8311219	HMO	400	12	60.0	03/23/2015	N	\$60.00	\$0.00	\$60.00	
00730-5013-H0288-B0001-G101915 (48475)	04/01/2015	04/30/2015	50112	Researcher 2 Nat Phys Science	T3D7	1002688	8330278	HMO	400	12	60.0	04/17/2015	N	\$60.00	\$0.00	\$60.00	
00730-5013-H0288-B0001-G101915 (48475)	04/01/2015	04/30/2015	50182	Researcher 2 Nat Phys Science	1307	1002688	8330278	HMO	10	12	1856.19	04/17/2015	N	\$1,856.19	\$0.00	\$1,856.19	
00730-5013-H0288-B0001-G101915 (48475)	04/01/2015	04/30/2015	50182	Researcher 2 Nat Phys Science	T3D7	1002688	8330278	HMO	180	12	43.84	04/17/2015	N	\$43.84	\$0.00	\$43.84	
00730-5013-H0288-B0001-G101915 (48475)	05/01/2015	05/11/2015	50182	Researcher 2 Nat Phys Science	1307	1002688	8342752	HMO	491	12	750.0	05/13/2015	Y	\$750.00	\$0.00	\$750.00	
00730-5013-H0288-B0001-G101915 (48475)	05/01/2015	05/31/2015	50182	Researcher 2 Nat Phys Science	T307	1002688	8351450	HMO	10	12	1636.94	05/17/2015	N	\$1,636.94	\$0.00	\$1,636.94	
00730-5013-H0268-B0001-G101915 (48475)	05/01/2015	05/31/2015	50112	Researcher 2 Nat Phys Science	1307	1002688	8351450	HMO	400	12	60.0	05/17/2015	N	\$60.00	\$0.00	\$60.00	
00730-5013-H0288-B0001-G101915 (48475)	05/01/2015	05/31/2015	50182	Researcher 2 Nat Phys Science	1307	1002688	8351450	HMO	180	12	87.69	05/17/2015	N	\$87.69	\$0.00	\$87.69	
00730-5013-H0288-B0001-G101915 (48475)	05/01/2015	05/31/2015	50182	Researcher 2 Nat Phys Science	1307	1002688	8351450	HMO	150	12	175.39	05/17/2015	N	\$175.39	\$0.00	\$175,39	
			-	Design and the second	*****		-	Harr	10				SUBIL:	36,630.08	50.00	\$6,630.08	50%
00730-5013-H0280-B0001-5101970 (48254)	03/01/2015	03/31/2015	50102	Researcher 2 Nat Phys Science	1307	1002666	0311219	HMU	10	12	353.7	03/23/2015	IN .	5353.70	\$0.00	\$353.70	
00730-5013-H0266-B0001-G101970 (46264)	03/01/2015	03/31/2015	50162	Researcher 2 Nat Phys Science	1307	1002666	0311219	HMO	150	12	0.77	03/23/2015	14	\$17.54	50.00	\$17.54	
00730-5013-H0289-B0001-G101970 (48254)	03/01/2015	03/31/2015	60112	Researcher 2 Nat Phys Science	1307	1002000	0311213	HMO	100	12	12.0	03/23/2015		\$12.00	50.00	612.00	
00730-5013-H0289-B0001-G101970 (40264)	04/04/2015	04/30/2015	50102	Researcher 2 Nat Phys Science	T107	1002000	0311213	HMO	10	12	371.34	03/23/2015	82	\$371.34	50.00	\$371.34	
00730-5013-H0280-B0001-3101970 (48264)	04/01/2015	04/30/2015	501102	Department 2 Mat Phys Science	T307	1002000	9330278	HMO	400	12	12.0	04/17/2015	N	\$12.00	\$0.00	\$12.00	
00730-5013-H0288-B0001-G101970 (48264)	04/01/2015	04/30/2015	50182	Researcher 2 Nat Phys Science	T307	1002600	8330278	HMO	180	12	8.77	04/17/2015	N	58 77	\$0.00	\$8.77	
66136-5613118260-86661-6161216 (46264)	041012012	04.0012.010	101104	Researcher & Han Pitys Selence	1401	Towevou.	ourseally.	THE .	100		9.7.7	24 11/2012	SubTL	\$754.02	\$0.00	\$784 02	64
00730-2080-H0288-B1672-NA (32522)	03/01/2015	03/31/2015	50182	Researcher 2 Nat Phys Science	T3D7	1002688	8311219	HMO	10	12	1414.79	03/23/2015	N	\$1,414,79	\$0.00	\$1,414,79	
00730-2080-H0288-B1672-NA (32522)	03/01/2015	03/31/2015	50182	Researcher 2 Nat Phys Science	T307	1002688	8311219	HMO	150	12	70 16	03/23/2015	N	570 16	50.00	\$70.16	
00730-2080-H0288-B1672-NA (32522)	03/01/2015	03/31/2015	50182	Researcher 2 Nat Phys Science	T307	1002688	8311219	HMO	170	12	35.08	03/23/2015	N	\$35.08	\$0.00	\$35.08	
00730-2080-H0288-B1672-NA (32522)	03/01/2015	03/31/2015	50112	Researcher 2 Nat Phys Science	1307	1002688	8311219	HMO	400	12	48.0	03/23/2015	N	548 00	\$0.00	\$48.00	
00730-2080-H0288-B1672-NA (32522)	04/01/2015	04/30/2015	50112	Researcher 2 Nat Phys Science	T3D7	1002688	8330278	HMO	400	12	48.0	04/17/2015	N	\$48.00	\$0.00	\$48.00	
00730-2080-H0288-B1672-NA (32522)	04/01/2015	04/30/2015	50182	Researcher 2 Nat Phys Science	T3D7	1002688	8330278	HMO	180	12	35.08	04/17/2015	N	\$35.08	\$0.00	\$35.08	
00730-2080-H0288-B1672-NA (32522)	04/01/2015	04/30/2015	50182	Researcher 2 Nat Phys Science	T3D7	1002688	8330278	HMO	10	12	1484.95	04/17/2015	N	\$1,484.95	\$0.00	\$1,484.95	
00730-2080-H0288-B1672-NA (32522)	05/01/2015	05/11/2015	50182	Researcher 2 Nat Phys Science	T3D7	1002688	8342752	HMO	491	12	750.0	05/13/2015	Y	\$750.00	\$0.00	\$750.00	
00730-2080-H0288-B1672-NA (32522)	05/01/2015	05/31/2015	50112	Researcher 2 Nat Phys Science	T3D7	1002688	8351450	HMO	400	12	60.0	05/17/2015	N.	\$60.00	\$0.00	\$60.00	
00730-2080-H0288-B1672-NA (32522)	05/01/2015	05/31/2015	50182	Researcher 2 Nat Phys Science	T3D7	1002688	8351450	HMO	180	12	87.7	05/17/2015	N	\$87.70	\$0.00	\$87.70	
00730-2080-H0288-B1672-NA (32522)	05/01/2015	05/31/2015	50182	Researcher 2 Nat Phys Science	T3D7	1002688	8351450	HMO	150	12	175.39	05/17/2015	N	\$175.39	\$0.00	\$175.39	
00730-2080-H0288-B1672-NA (32522)	05/01/2015	05/31/2015	50182	Researcher 2 Nat Phys Science	T307	1002688	8351450	HMO	10	12	1636.96	05/17/2015	N	\$1,636.96	\$0.00	\$1,636.96	
				ADDRAFT V CELEVIAR DAME (SUBADA									SubTL:	\$5,846,11	\$0.00	\$5,846.11	44%
		_											Total	\$13,260,21	\$0.00	\$13 260 21	100%

Next, click *Close Window* to exit from the Payroll Detail report and resume Pre Reviewing the effort form for Jennifer Evans.

E. After reviewing the effort form, Grant Adams agrees no changes need to be made to Jennifer Evans' effort form, and then clicks *Proceed.*

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	Reporting Per	University of Houston riod: 053115 (03/01/2015 - 05/31/2015)								
		Pre Review Effort Form								
Name: Jennifer Evans SubDept: H0XXX View Previously Certified Effort Statement	Name: Jennifer Evans Employee ID: 888888001 Title: Researcher 2 Nat Phys Science SubDept: H0XXX Division: H0409 Title Code: T3D7 View Previously Certified Effort Statements Final Action Statements Title Code: T3D7									
	This Form is	s Subject to Line Item Certification								
Commitment Payroll	Accounts Spannered Accounts			Cost Sharing		Total \$	Total %			
\$6,630,08	50% 00730-5013-H0288-B0001-G101915 (48475)	ARITHMETICAL AND COG	s	0.00	0%	\$6,630,08	50%			
\$784.02	6% 00730-5013-H0288-B0001-G101970 (48264)		s	0.00	0%	\$784.02	6%			
\$7 414 10	56%	Total Sponsored Accounts	۳	\$0.00	0%	\$7,414,10	56%			
\$1, 111 ,10	Non-Sponsored Accounts	Total Sponsorea Accounts		0.00	070	07,414.10	5070			
\$5.846.11	44% 00730-2080-H0288-B1672-NA (32522)	TEJAS LEE TRAINING	\$	0.00	0%	\$5,846.11	44%			
\$5,846.11	44%	Total Non-Sponsored Accounts		\$0.00	0%	\$5,846.11	44%			
<u>\$13,260.21</u>	100%	Grand Total		\$0.00	0%	\$13,260.21	100%			
		Notes Maximum 800 characters				11				

F. The Pre Review Summary shows that you have completed Pre Review of the effort form. ERS records on the effort form the name of the Pre Reviewer and the date the forms was Pre Reviewed. Additionally, the form indicates that an email notification was sent to the Certifiers (two [2] PIs who will be certifying Jennifer Evans' effort form) alerting them that the effort form has been Pre Reviewed and is ready for their certification. The Pre Reviewed effort form can be downloaded to PDF or sent to a printer for a hard copy. By clicking *Exit*, ERS will take you back to your (Grant Adams') list of effort forms requiring Pre Review.

e: Jennifer Evans	F	Employee ID: 858888001	Title: Researcher 2 Nat Phys Science				-
lept: H0XXX	D	Jivision, H0409	Title Code: T3D7				A
Previously Certified Et	ffort Statements						
Commitment	Payroll	Accounts		Cost Sharin	ng	Total \$	Total 9
	Sponsored Accounts						
	\$6,630.08	50% 00730-5013-H0288-B0001-G101915 (48475)	ARITHMETICAL AND COG	\$0.00	0%	\$6,630.08	509
	5784.02	6% 00730-5013-H0288-B0001-G1019/0 (48254)	USING LONGITUDINAL A	\$0.00	07%	\$784.02	67
	\$7,414.10	56%	Total Sponsored Accounts:	\$0.00	0%	\$7,414.10	367
	Non-Sponsored Accounts	445 00700 0000 M0000 D4670 MA (00500)	TE INCI EE TO MINING	en no.	Detr.	CC 010 11	
	\$5 BAE 11	44% 00130-2050-H0209-D.1012-DMA.122022	Total Non Spanning Accounts	\$0.00	0%	\$5,640.11	44
	30,040,11	44%	Total Hon-Sponsored Accounts.	50.00	0%	\$13,040.11	1001
N/A							
		Earn Die Deurstand Put	Overt Manua				
		Form Pre Reviewed By	Increase and Incre				
		IForm Pre Reviewed On:	06/28/2015				

G. Note Jennifer Evans' effort form has now been Pre Reviewed and is notated with a letter "Y" meaning "yes", the form has been Pre Reviewed. Click on **Return to Home** link.



Scenario #3: PRE REVIEW OF THE EFFORT REPORT

Employee # 2A – Karen Davis A

A. From the home page, click on "3" listed under Critical.

UNIVERSITY of HOUSTON	Certification									
					Home	My Profile	Tutorial	Help -	About	Log Off
CERT	Departmental Coordinator	r								
^	Grant Adams								Your Assigne	d <u>Departments</u> .
Assignment										
Notification			Effort Fo	orm Status						
Pre Review		Completion	Status: 0% for Curr	ent Repor <mark>t</mark> ing	g Period - 0531	15				
Certify	T									
Post Review		Total <u>0 out of 4</u> forms completed; <u>3</u> pending P	Pre Review; <u>1</u> pendin	g Certification;	0 pending Post I	Review. 1 from Prio	Periods.			
Reporting										
			My Statu	ıs / To Do						
					_	_				
			Pre R	eview	Pos	t Review				
			Pending	Critical	Pending	Certification				
		Current Period (053115)	0	3	0	1				
		Prior Periods	1	0	0	D				
	Search	n Employee Effort Forms				Search Employ	ee Effort Form	15 By Accou	int	
	Employee Id	(Search)		Accou	unt Id				(Sea	arch)

B. Select Karen Davis A from the Pre Review list of individuals.

UNIVERSITY of	Certification			CARE							
						Home	My Profile	Tutorial	Help▼	About	Log Off
CERT		(Critical Effor	rt Forms Pendi	ng Pre Review for	Current Rep	porting Period				
Assignment Notification Pre Review Certify Post Review Reporting	► <u>Return to Home</u>	Name Ri Karen Davis B Karen Davis B Michael, Ford 0	P Code Sub 153115 H03 153115	Dept Title Cod XXX 1010 XXX 1010 XXX 1010 XXX 1020	ielPre Reviewed? N N (CT Posted) N	Certified? P N N N	ost Reviewed? [Ci N Ka N Ka N Mi	ertifier Name aren Davis aren Davis chael, Ford			

Page 14 of 49 © MAXIMUS, Inc. 2015 All rights reserved. No part of this publication may be reproduced, stored in a retrieval system, or transmitted, in any form or by any means, electronic, mechanical, photocopying, recording or otherwise without prior written permission of MAXIMUS, Inc. C. Notice the message at the top of the form indicating that the form is subject to the Salary CAP. The Pre Reviewer can click on the " CAP " icon (or the 'here' link at the top) that is displayed next to the account to view more information pertaining to the Salary CAP. Click here link to review the information ERS provides to the Pre Reviewer.

			Un Reporting Period	iversity of Houston 1: 053115 (03/01/2015 - 05/31/2015)					
	This form conta	ains an award(s) with a sponso	r imposed salary cap. For de related to all ca	tails related to a specific Account,ple p-imposed Accounts,click <u>here</u> .	ease click	on CAP indicated	d below. To se	e the details	
			Pre	Review Effort Form					
Name: Karen Davis	A		Employee ID: 66666600	1 🔪		Title	Professor		
SubDept: H0XXX			Division: H0409			Title	Code: 1010		
View Previously Cer	tified Effort Stateme	<u>nts</u>		×					
			Add Account	Input as % Reset Form					
Committee out	Davina II	A				Cast Sharing		Tetel C	T-4-1.0/
Commitment	Payroli	Sponsored Account	s			Cost Sharing		Total \$	Total %
20%	\$14,653.42	20% 00730-5013-H0288-B	- 0001-G104660 (50061) CAP	TEXAS CENTER FOR LEA	\$	0.00	0%	\$14,653.42	20%
15%	\$12,731.66	18% 00730-5013-H0288-B	0001-G104661 (50053) CAP	TEXAS CENTER FOR LEA	\$	0.00	0%	\$12,731.66	18%
0%	\$7,446.82	10% 00730-5013-H0288-B	0001-G107189 (53593) CAP	A Follow-Up of Child	\$	0.00	0%	\$7,446.82	10%
50%	\$31,949.26	44% 00730-5015-H0288-B	0001-G100232 (46963)	UNDERSTANDING MALLEA	\$	0.00	0%	\$31,949.26	44%
85%	\$66,781.16	92%		Total Sponsored Accounts		\$0.00	0%	\$66,781.16	92%
		Non-Sponsored Act	counts						
	\$5,205.64	8% 00730-1101-H0288-C	0633-NA (38604)	PUBLIC SCHOOLS PARTN	\$	0.00	0%	\$5,205.64	8%
	\$5,205.64	8%		Total Non-Sponsored Accounts		\$0.00	0%	\$5,205.64	8%
	<u>\$71,986.80</u>	100%		Grand Total		\$0.00	0%	\$71,986.80	100%
				Notos					
				Maximum 800 characters				18	
				indexinally obb characters					
			Exit Form Initiate C	T) Save Form) Proceed) He	elp)				
			Nex	t Form					
			lines						

D. ERS provides the detailed information related to Salary CAP for each account/project subject to the cap. Click on **Close Window** to return to the form.



E. To make the necessary adjustments in compliance with the Salary CAP, the Pre Reviewer would need to generate a cost transfer in PeopleSoft. Click on Initiate CT to mark the effort form as 'Pending Cost Transfer'.

		Un Reporting Period	iversity of Houston i: 053115 (03/01/2015 - 05/31/2015)					
This for	m contains an award(s) with a sponsor	imposed salary cap. For de related to all ca	etails related to a specific Account,p p-imposed Accounts,click <u>here</u> .	lease click	on CAP indicate	ed below. To see	e the details	
		Pre	Review Effort Form					
Name: Karen Davis A		Employee ID: 666666007	1		Titl	e: Professor		
SubDept: H0XXX		Division: H0409			Titl	e Code: 1010		
View Previously Certified Effort S	Statements							
		Add Account	Input as % Reset Form					
Commitment P	ayroll Accounts				Cost Sharing	9	Total \$	Total %
	Sponsored Accounts	i						
20% \$14.653.42	20% 00730-5013-H0288-B0	001-G104660 (50061) CAP	TEXAS CENTER FOR LEA	\$	0.00	0%	\$14,653.42	20%
<u>15%</u> <u>\$12,731.66</u>	18% 00730-5013-H0288-B0	001-G104661 (50053) CAP	TEXAS CENTER FOR LEA	\$	0.00	0%	\$12,731.66	18%
0% \$7,446.82	10% 00730-5013-H0288-B0	001-G107189 (53593) CAP	A Follow-Up of Child	\$	0.00	0%	\$7,446.82	10%
50% <u>\$31,949.26</u>	44% 00730-5015-H0288-B0	001-G100232 (46963)	UNDERSTANDING MALLEA	\$	0.00	0%	\$31,949.26	44%
85% \$66,781.16	92%		Total Sponsored Accounts		\$0.00	0%	\$66,781.16	92%
	Non-Sponsored Acc	ounts						
\$5,205.64	8% 00730-1101-H0288-C0	633-NA (38604)	PUBLIC SCHOOLS PARTN	\$	0.00	0%	\$5,205.64	8%
\$5,205.64	8%		Total Non-Sponsored Accounts		\$0.00	0%	\$5,205.64	8%
<u>\$71,986.80</u>	100%	· · · · ·	Grand Total		\$0.00	0%	\$71,986.80	100%
			Notes					
			Maximum 800 characters					
		Exit Form Initiate C	T CT Save Form Proceed	Help				
		Nex	t Form Last Form	_				

F. Karen Davis A' form now reflects "Cost Transfer Pending". The effort form is put on hold until the cost transfer is transacted and approved in PeopleSoft and subsequently brought into ERS. Click on **Exit Form**.

			Un Reporting Period	iversity of Houston : 053115 (03/01/2015 - 05/31/2015)					
	This form conta	ins an award(s) with a sponsor imp	oosed salary cap. For de related to all ca	tails related to a specific Account,p p-imposed Accounts,click <u>here</u> .	lease click	on CAP indicate	d below. To see	e the details	
			Pre	Review Effort Form					
Name: Karen Davis	a A	E	Employee ID: 666666001			Title	e Professor		
SubDept: H0XXX		[Division: H0409			Title	Code: 1010		
View Previously Ce	rtified Effort Stateme	nts	\ \						
			Cos	st Transfer Pending					
			(Add Assaugh	Tenut as % Reset Form					
			Add Account	Reset Porm					
Commitment	t Payroll	Accounts				Cost Sharing		Total \$	Total %
		Sponsored Accounts			-				
20%	<u>\$14.653.42</u>	20% 00/30-5013-H0288-B0001	-G104660 (50061) CAP	TEXAS CENTER FOR LEA	\$	0.00	0%	\$14,653.42	20%
<u>15%</u>	<u>\$12,731.66</u>	18% 00730-5013-H0288-B0001	-G104661 (50053) CAP	TEXAS CENTER FOR LEA	\$	0.00	0%	\$12,731.66	18%
<u>0%</u>	<u>\$7.446.82</u>	10% 00730-5013-H0288-B0001	-G107189 (53593) CAP	A Follow-Up of Child	\$	0.00	0%	\$7,446.82	10%
<u>50%</u>	\$31,949.26	44% 00730-5015-H0288-B0001	-G100232 (46963)	UNDERSTANDING MALLEA	\$	0.00	0%	\$31,949.26	44%
85%	\$66,781.16	92%		Total Sponsored Accounts		\$0.00	0%	\$66,781.16	92%
		Non-Sponsored Accoun	ts						
	<u>\$5,205.64</u>	8% 00730-1101-H0288-C0633	<u>-NA (38604)</u>	PUBLIC SCHOOLS PARTN	\$	0.00	0%	\$5,205.64	8%
	\$5,205.64	8%		Total Non-Sponsored Accounts		\$0.00	0%	\$5,205.64	8%
	<u>\$71,986.80</u>	100%		Grand Iotal		\$0.00	0%	\$71,986.80	100%
				Notes					
			×	Maximum 800 characters				<i>77</i>	
			Evit Form	Indo CT Pending Status					
				Form					
			LIVEX	Custron					

G. Karen Davis' A effort form status reflects N (CT Pending), indicating that the cost transfer is pending to be processed.

UNIVERSITY OF HOUSTON Hands-on-Training of MAXIMUS Effort Reporting System

HOUSTON	Certification				RE			F				
							Home	My Profile	Tutorial	Help -	About	Log Off
CERT			Critical	Effort Forr	ns Pendir	ng Pre Review for C	Current Rep	orting Period				
Assignment		Name Karen Davis A Karen Davis B	RP Code 053115 053115	Sub Dept H0XXX H0XXX	Title Cod 1010 1010	N (CT Pending)	ertified? Po N N	N N	Certifier Name Karen Davis Karen Davis			
Notification		Michael, Ford	053115	HOXXX	1020	N	N	N N	Michael, Ford			
Pre Review	▶ <u>Return to Home</u>											
Certify												
Post Review												
Reporting												

Employee # 2B – Karen Davis B

A Karen Davis B form reflects the Cost Transfer that was processed in PeopleSoft and subsequently, loaded in ERS. This is a continuation of Karen Davis A. Pre Reviewer, Grant Adams, received an email stating that the cost transfer has been processed and that the effort form is now ready to be Pre Reviewed and certified. Karen Davis B form has the status of N (CT Posted), indicating that the cost transfer has been posted. Click on Karen Davis B.

UNIVERSITY of HOUSTON	Certification							
				Home M	y Profile	Tutorial	Help• About	Log Off
CERT		Critical Effort For	ms Pendir	ng Pre Review fo	r Current Re	porting Period	ł	
^	Name	RP Code Sub Dep	t Title Cod	e Pre Reviewed?	Certified?	ost Reviewed	? Certifier Name	
Assignment	Karen Davis A	053115 H0XXX	1010	N (CT Pending)	N	N	Karen Davis	
Notification	Karen Davis E Michael, Ford	053115 H0XXX 053115 H0XXX	1010 1020	N (CT Posted) N	N	N N	Karen Davis Michael Ford	
Nouncation								
Pre Review	Return to Home							
Certify								
Post Review								
Reporting								

B At the top of the effort form, Pre Reviewer is notified that the cost transfer has been posted. To view transactions that were posted, click on the Total Payroll link, **\$71,986.00**.

		U Reporting Perio	Iniversity of Houston od: 053115 (03/01/2015 - 05/31/2015)				
	This form conta	ains an award(s) with a sponsor imposed salary cap. For related to all Cost Transfer I	details related to a specific Account , ple ap-imposed Accounts , click <u>here</u> . has been posted to this Effort Form.	ase click on 📽	indicated below.	To see the details	
		P	re Review Effort Form				
Name: Karen Davis	В	Employee ID: 444440	01		Title: Profess	sor	
SubDept: H0XXX		Division: H0409			Title Code: 1	010	
View Previously Cer	tified Effort Stateme	<u>ints</u>					
		Add Account	Input as % Reset Form				
0				0		T - 14	T . 10/
Commitment	Payroll	Accounts Sponsored Accounts		Co	st Sharing	l otal \$	lotal %
20%	\$9.405.22	13% 00730-5013-H0288-B0001-G104660 (50061) CAP	TEXAS CENTER FOR LEA	s	0.00 0	% \$9.405.22	13%
15%	\$8,008.28	11% 00730-5013-H0288-B0001-G104661 (50053) CAP	TEXAS CENTER FOR LEA	\$	0.00 0	% \$8.008.28	11%
0%	\$4.822.72	7% 00730-5013-H0288-B0001-G107189 (53593) CAP	A Follow-Up of Child	s	0.00 0	% \$4.822.72	7%
50%	\$31,949,26	44% 00730-5015-H0288-B0001-G100232 (46963)	UNDERSTANDING MALLEA	\$	0.00 0	% \$31.949.26	44%
85%	\$54,185.48	75%	Total Sponsored Accounts		0.00	% \$54,185.48	75%
		Non-Sponsored Accounts					
	\$5,205.64	7% 00730-1101-H0288-C0633-NA (38604)	PUBLIC SCHOOLS PARTN	\$	0.00 0	% \$5,205.64	7%
_	<u>\$12,595.68</u>	18% 00730-2072-H0288-B1691-NA (34116)	TIMES IDC	\$	0.00	% \$12,595.68	18%
1	\$17,801.32	25%	Total Non-Sponsored Accounts	5	\$0.00 0	% \$17,801.32	25%
	\$71,986.80	100%	Grand Total		\$0.00 O	% \$71,986.80	100%
			N				
			Maximum 800 characters				
			maximum 000 characters				
		Exit Form Initiate	CT CT Save Form Proceed He	elp)			
		Top Form Pre	ev. Form Next Form Last Form)			
				/			

B Items highlighted in green represent the cost transfer that was processed in PeopleSoft and reflected in ERS. Click on **Close Window** to close this screen and return to the Pre Review form.

				Pay Reporting Pe	roll Del Univer riod: 05:	ails By Tra sity of Hou 3115 (03/01	nsaction ston /2015 - 05//	31/2015	5)								
Name: Karen Davis B SubDoot: H0XXX			Employ	ee ID: 444444001					,			Title:	Professor	0			
oubbept. Horote			Division						0	tall Duri	(anth)	The	5000.10				
		Chang	ge to All					•	De	tall by r	nonth						
															Non		Effort
Cost Center	Begin Date	End Date	Account Code	Job Title	Job Code	Position	Check Number	Pay Group	Earning Code	АРРТ	Pre Amount	DatePaid	Off Cycle?	Payroll	Effort Payroll	Effort Payroll	Payroll %
00730-5013-H0288-B0001-G104660 (50061) 00730-5013-H0288-B0001-G104660 (50061)	03/01/2015	03/31/2015	50112	Summer Research	2090	1013199	8257031	HMO	400	12	115.2	04/25/2015	N	\$115.20 \$7.571.84	\$0.00	\$115.20 \$7.571.84	
00730-5013-H0288-B0001-G104660 (50061)	04/01/2015	04/30/2015	50162	Summer Research	2090	1013199	8274792	HMO	10	12	6861.98	04/24/2015	N	\$6,861,98	\$0.00	\$6,861,98	
00730-5013-H0288-B0001-G104660 (50061)	04/01/2015	04/30/2015	50112	Summer Research	2090	1013199	8274792	HMO	400	12	104.4	04/24/2015	N	\$104.40	\$0.00	\$104.40	
00730-5013-H0288-B0001-G104660 (50061)	04/01/2015	04/30/2015	50162	Summer Research	2090	1013199	8274792	HMO	10	12	-5248.2	07/24/2015	N	\$-5,248.20	\$0.00	\$-5,248.20	
00720 6013 H0209 R0001 G104661 (60063)	02/04/2016	02/21/2015	60112	Summer Besserah	2000	1012100	0257024	нио	400	10	100.9	04/05/0015	SubTL:	\$9,405.22	\$0.00	\$9,405.22	13%
00730-5013-H0288-B0001-G104661 (50053)	03/01/2015	03/31/2015	50162	Summer Research	2090	1013199	8257031	HMO	10	12	6625.36	04/25/2015	N	\$6,625,36	\$0.00	\$6,625,36	
00730-5013-H0288-B0001-G104661 (50053)	04/01/2015	04/30/2015	50112	Summer Research	2090	1013199	8274792	HMO	400	12	90.0	04/24/2015	N	\$90.00	\$0.00	\$90.00	
00730-5013-H0288-B0001-G104661 (50053)	04/01/2015	04/30/2015	50162	Summer Research	2090	1013199	8274792	HMO	10	12	5915.5	04/24/2015	N	\$5,915.50	\$0.00	\$5,915.50	
00730-5013-H0288-B0001-G104661 (50053) C	04/01/2015	04/30/2015	50112	Summer Research	2090	1013199	8274792	HMO	400	12	-4723.38	07/24/2015	N	\$-4,723.38	\$0.00	\$-4,723.38	
													SubTL:	\$8,008.28	\$0.00	\$8,008.28	11%
00730-5013-H0288-B0001-G107189 (53593)	03/01/2015	03/31/2015	50112	Summer Research	2090	1013199	8257031	HMO	400	12	7225.22	04/25/2015	N	\$111.60	\$0.00	\$111.60	
00730-5013-H0288-B0001-G107189 (53593)	03/01/2015	03/31/2015	50162	Summer Research	2090	1013199	8257031	HMO	10	12	-2624.1	04/25/2015	N	\$7,335.22	\$0.00	\$7,335.22	
00750-5015-10260-60001-0107169 (55595)	04/01/2010	04/30/2013	30102	ouninerresearen	2000	1010100	0201001	TIMO	10	14	-2024.1	0112412013	SubTL:	\$4 822 72	\$0.00	\$4 822 72	7%
00730-5015-H0288-B0001-G100232 (46963)	04/01/2015	04/30/2015	50112	Summer Research	2090	1013199	8274792	HMO	400	12	136.8	04/24/2015	N	\$136.80	\$0.00	\$136.80	
00730-5015-H0288-B0001-G100232 (46963)	04/01/2015	04/30/2015	50162	Summer Research	2090	1013199	8274792	HMO	10	12	8991.56	04/24/2015	N	\$8,991.56	\$0.00	\$8,991.56	
00730-5015-H0288-B0001-G100232 (46963)	05/01/2015	05/31/2015	50112	Summer Research	2090	1013199	8289792	HMO	400	12	342.0	05/22/2015	N	\$342.00	\$0.00	\$342.00	
00730-5015-H0288-B0001-G100232 (46963)	05/01/2015	05/31/2015	50162	Summer Research	2090	1013199	8289792	HMO	10	12	22478.9	05/22/2015	N	\$22,478.90	\$0.00	\$22,478.90	
00700 4404 U0000 00000 NA (00004)	00/04/0045	000040045	50400	0	2000	4040400	0057004		40	10	2420.50	04/05/0045	SubTL:	\$31,949.26	\$0.00	\$31,949.26	44%
00730-1101-H0288-C0033-NA (38004) 00730-1101-H0288-C0633-NA (38004)	03/01/2015	03/31/2015	50162	Summer Research	2090	1013199	8257031	HMO	10	12	2129.58	04/25/2015	N	\$2,129.58	\$0.00	\$2,129.58	
00730-1101-H0288-C0633-NA (38604)	05/01/2015	05/31/2015	50162	Summer Research	2090	1013199	8289792	HMO	10	12	1183.1	05/22/2015	N	\$1,032.50	\$0.00	\$1,032.50	
	0010112010	00/01/2010	00102	ouninerricoouren	2000	1010100	0200102					0012212010	SubTL:	\$5.205.64	\$0.00	\$5.205.64	7%
00730-2072-H0288-B1691-NA (34116) C	04/01/2015	04/30/2015	50162	Summer Research	2090	1013199	8289792	HMO	10	12	12595.68	07/24/2015	N	\$12,595.68	\$0.00	\$12,595.68	
													SubTL:	\$12,595.68	\$0.00	\$12,595.68	18%
00730-1026-H0437-B0510-NA (18936) E	03/01/2015	03/31/2015	50112	Summer Research	2090	1013199	8257031	HMO	400	12	32.4	04/25/2015	N	\$32.40	\$32.40	\$0.00	
00720 4026 U0427 00244 NA (40027) E	04/01/2016	04/20/2015	60112	Summer Beeserah	2000	1012100	0074700	HMO	400	10	20.0	04/24/2015	SubTL:	\$32.40	\$32.40	\$0.00	
00730-1020-H0437-C0211-NA (18937) E	05/01/2015	05/30/2015	50112	Summer Research	2090	1013199	9290702	HMO	400	12	19.0	04/24/2015	N	\$19.00	\$19.00	\$0.00	
00730*1020*H0437*C0211*NA(10937)	03/01/2013	03/31/2013	30112	Summer Research	2000	1013133	0200102	TIMO	400	12	10.0	03/22/2013	SubTL 1	\$46.80	\$46.80	\$0.00	
00730-2080-H0233-F0857-NA (32352)	03/01/2015	03/31/2015	50112	Summer Research	2090	1013199	8257031	HMO	400	12	360.0	03/16/2015	N	\$360.00	\$0.00	\$360.00	
00730-2080-H0233-F0857-NA (32352)	03/01/2015	03/31/2015	50162	Summer Research	2090	1013199	8257031	HMO	10	12	-23662.0	03/16/2015	N	\$-23,662.00	\$0.00	\$-23,662.00	
00730-2080-H0233-F0857-NA (32352)	03/01/2015	03/31/2015	50112	Summer Research	2090	1013199	8257031	HMO	400	12	-360.0	03/16/2015	N	\$-360.00	\$0.00	\$-360.00	
00730-2080-H0233-F0857-NA (32352)	03/01/2015	03/31/2015	50162	Summer Research	2090	1013199	8257031	HMO	10	12	23662.0	03/16/2015	N	\$23,662.00	\$0.00	\$23,662.00	
													SubTL:	\$0.00	\$0.00	\$0.00	0%
Noto:						<hr/>							Total:	\$72,066.00	\$79.20	\$71,986.80	100%
Transactions in Excluded are highlig	hted in grav																
Transactions from Posted Cost Trans	fers are highlig	hted in areen.															
							-										
1				EXCEL	Do	wnload) (Close Winde	ow)									
				EXOLU													

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B To meet the stipulated commitment, this form will also need to reflect appropriate level of Cost Sharing. Click on **Input as %** to reflect cost sharing.

		Reporti	University of Houston ing Period: 053115 (03/01/2015 - 05/31/2015)				
	This form cont	ains an award(s) with a sponsor imposed salary o relate Cost T	cap. For details related to a specific Account , pl ed to all cap-imposed Accounts , click <u>here.</u> Fransfer has been posted to this Effort Form.	ease click on 🥵 indic	ated below. To se	ee the details	
			Pre Review Effort Form				
Name: Karen Da	vis B	Employee ID:	44444001		Title: Professor		
SubDept: H0XXX	<	Division: H040	09	-	Fitle Code: 1010		
View Previously	Certified Effort Stateme	ents	<u>}</u>				
		Add	Account Input as % Reset Form				
Commitme	ent Pavroll	Accounts		Cost Shar	ina	Total \$	Total %
		Sponsored Accounts					
20%	\$9,405.22	13% 00730-5013-H0288-B0001-G104660 (50	061) CAP TEXAS CENTER FOR LEA	\$ 0.00	0%	\$9,405.22	13%
<u>15%</u>	\$8,008.28	11% 00730-5013-H0288-B0001-G104661 (50	053) CAP TEXAS CENTER FOR LEA	\$ 0.00	0%	\$8,008.28	11%
<u>0%</u>	\$4,822.72	7% 00730-5013-H0288-B0001-G107189 (53	593) CAP A Follow-Up of Child	\$ 0.00	0%	\$4,822.72	7%
<u>50%</u>	\$31,949.26	44% 00730-5015-H0288-B0001-G100232 (46	963) UNDERSTANDING MALLEA	\$ 0.00	0%	\$31,949.26	44%
85%	\$54,185.48	75%	Total Sponsored Accounts	\$0.00	0%	\$54,185.48	75%
		Non-Sponsored Accounts					
	<u>\$5,205.64</u>	7% 00730-1101-H0288-C0633-NA (38604)	PUBLIC SCHOOLS PARTN	\$ 0.00	0%	\$5,205.64	7%
	<u>\$12,595.68</u>	18% 00730-2072-H0288-B1691-NA (34116)	TIMES IDC	\$ 0.00	0%	\$12,595.68	18%
	\$17,801.32	25%	Total Non-Sponsored Accounts	\$0.00	0%	\$17,801.32	25%
	<u>\$71,986.80</u>	100%	Grand Total	\$0.00	0%	\$71,986.80	100%
			Notos				
			Maximum 800 characters				
		Exit Form (Top Form	Initiate CT Save Form Proceed H				

C. Enter the following in the cost sharing boxes and then click on Input as \$:

			University of Houston Reporting Period: 053115 (03/01/2015 - 05/31/2015)				
	This form co	ntains an award(s) with a sponsor imposed salary cap.	For details related to specific Account, please click on \$ Accounts, click <u>here</u> .	AP indicated below. To s	see the details related to	all cap-imposed	
			Pre Review Effort Form				
Name: Karen Davis B SubDept: H0XXX		Employee Division: F	ID: 44444001 10409 Add Account Input as \$ Reset Form		Title: Professor Title Code: 1010		
Commitment	Payroll	Accounts		Cost Sh	aring	Total \$	Total %
	9	ponsored Accounts					
20%	<u>\$9,405.22</u>	13% 00730-5013-H0288-B0001-G104660 (50061) CAP	TEXAS CENTER FOR LEA	7 %	\$4,677.13	\$14,082.35	20%
<u>15%</u>	<u>\$8,008.28</u>	11% 00730-5013-H0288-B0001-G104661 (50053) CAP	TEXAS CENTER FOR LEA	4 %	\$2,879.47	\$10,887.75	15%
0%	<u>\$4.822.72</u>	7% 00730-5013-H0288-B0001-G107189 (53593) CAP	A Follow-Up of Child	7 %	\$5,039.08	\$9,861.80	14%
<u>50%</u>	\$31,949.26	44% 00730-5015-H0288-B0001-G100232 (46963)	UNDERSTANDING MALLEA	0 %	\$0.00	\$31,949.26	44%
85%	\$54,185.48	75%	Total Sponsored Accounts:	18%	\$12,595.68	\$66,781.16	93%
	h	Ion-Sponsored Accounts					
	\$5,205.64	7% 00730-1101-H0288-C0633-NA (38604)	PUBLIC SCHOOLS PARTN	0 %	\$0.00	\$5,205.64	7%
	\$12,595.68	18% 00730-2072-H0288-B1691-NA (34116)	TIMES IDC	-18 %	\$-12,595.68	\$0.00	0%
	\$17,801.32	25%	Total Non-Sponsored Accounts:	-18%	\$-12,595.68	\$5,205.64	7%
	<u>\$71,986.80</u>	100%	Grand Total	0%	\$0.00	\$71,986.80	100%
			Notes		,		
		Return to Input as \$ mode in order to proceed	d.				
			Exit Form Save Form Help				

D. Click on **Proceed**.

		Reporting Pe	University of Houston riod: 053115 (03/01/2015 - 05/31/2015)											
	This form contains ar	n award(s) with a sponsor imposed salary cap. For details relat	ed to a specific Account , please click on 🕸 Accounts , click <u>here</u> .	📽 indicated below. To see the d	etails related to	all cap-imposed								
		Cost Transfe	r has been posted to this Effort Form.											
			Pre Review Effort Form											
Name: Karen Davis B SubDept: H0XXX View Previously Certifie	ed Effort Statements	Employee ID: 44444001 Division: H0409		Title: I Title C	^o rofessor :ode: 1010									
		Add Accou	nt Input as % Reset Form											
Commitment	Payroll	Accounts		Cost Sharing		Total \$	Total %							
	Sponsored Accounts													
20%	<u>\$9,405.22</u>	13% 00/30-5013-H0288-B0001-G104660 (50061) CAP	TEXAS CENTER FOR LEA	\$ 4677.13	7%	\$14,082.35	20%							
<u>15%</u>	<u>\$8.008.28</u>	11% 00730-5013-H0288-B0001-G104661 (50053) CAP	TEXAS CENTER FOR LEA	\$ 2879.47	4%	\$10,887.75	15%							
0%	\$4,822.72	7% 00730-5013-H0288-B0001-G107189 (53593) CAP	A Follow-Up of Child	\$ 5039.08	7%	\$9,861.80	14%							
<u>50%</u>	\$31,949.26	44% 00730-5015-H0288-B0001-G100232 (46963)	UNDERSTANDING MALLEA	\$ 0.00	0%	\$31,949.26	44%							
85%	\$54,185.48	75%	Total Sponsored Accounts	\$12,595.68	18%	\$66,781.16	93%							
		Non-Sponsored Accounts												
	<u>\$5,205.64</u>	7% 00730-1101-H0288-C0633-NA (38604)	PUBLIC SCHOOLS PARTN	\$0.00	0%	\$5,205.64	7%							
	<u>\$12,595.68</u>	18% 00730-2072-H0288-B1691-NA (34116)	TIMES IDC	\$ -12595.68	-18%	\$0.00	0%							
	\$17,801.32	25%	Total Non-Sponsored Accounts	\$-12,595.68	-18%	\$5,205.64	7%							
	<u>\$71,986.80</u>	100%	Grand Total	\$0.00	0%	\$71,986.80	100%							
			Notes Maximum 800 characters		li									
		Exit Form Initia	te CT Save Form Proceed Help Prev. Form Next Form Last Form											

E. This completed the Pre Review. An email went out to Karen Davis B to notify her that her effort form is now available for certification. Click on **Exit**.

			Unive Reporting Period: 0	rsity of Houston 53115 (03/01/2015 - 05/31/2015)				
			Pre R	eview Summary				
Nam	e: Karen Davis B ept: H0XXX		Employee ID: 444444001 Division: H0409	Title: Professor Title Code: 1010				
View	Previously Certified	LEffort Statements						
	Commitment	Payroll	Accounts		Cost Sharing	9	Total \$	Total %
		Sponsored Accounts						
	20%	\$9,405.22	13% 00730-5013-H0288-B0001-G104660 (50061) CAR	TEXAS CENTER FOR LEA	\$4677.13	7%	\$14,082.35	20%
	15%	\$8,008.28	11% 00730-5013-H0288-B0001-G104661 (50053) CAP	TEXAS CENTER FOR LEA	\$2879.47	4%	\$10,887.75	15%
	0%	<u>\$4,822.72</u>	7% 00730-5013-H0288-B0001-G107189 (53593) CAR	A Follow-Up of Child	\$5039.08	7%	\$9,861.80	14%
	<u>50%</u>	<u>\$31,949.26</u>	44% 00730-5015-H0288-B0001-G100232 (46963)	UNDERSTANDING MALLEA	\$0.00	0%	\$31,949.26	44%
	85%	\$54,185.48	75%	Total Sponsored Accounts:	\$12,595.68	18%	\$66,781.16	93%
		Non-Sponsored Accounts						
		\$5,205.64	7% 00730-1101-H0288-C0633-NA (38604)	PUBLIC SCHOOLS PARTN	\$0.00	0%	\$5,205.64	7%
		\$12,595.68	18% 00730-2072-H0288-B1691-NA (34116)	TIMES IDC	\$-12595.68	-18%	\$0.00	0%
		\$17,801.32	25%	Total Non-Sponsored Accounts:	\$-12,595.68	-18%	\$5,205.64	7%
		<u>\$71,986.80</u>	100%	Grand Total:	\$0.00	0%	\$71,986.80	100%
	Notes: N/A							
			Form Pre Reviewed By: Form Pre Reviewed On:	Grant Adams 06/30/2015				
	This Effort	Form has been successfully Pre	Reviewed.If you would like a hard copy of the effortion	n, press the printer icon in the top right corner. Press the PDF icon t xit Hep rm Next Form Last Form	o download a PDF	version	n of this effort fo	m.
	Confirmati An email no	on tification was sent to the Certifier:	Karen Davis B , at on 06/30/15.					

Page 20 of 49 © MAXIMUS, Inc. 2015 All rights reserved. No part of this publication may be reproduced, stored in a retrieval system, or transmitted, in any form or by any means, electronic, mechanical, photocopying, recording or otherwise without prior written permission of MAXIMUS, Inc. F. Karen Davis B status now reflects "Y" under the Pre Reviewed? column.

UNIVERSITY of	Certification		N									
	_						Home	My Profil	e Tutorial	Help -	About	Log Off
CERT			Critical Eff	fort Form	s Pendir	ng Pre Review for	Current Rep	orting Period				
Assignment Notification Pre Review Certify Post Review Reporting	► <u>Retum to Home</u>	Name Ri Karen Davis A Karen Davis B Michael Ford C	P Code Su 153115 H 153115 H 153115 H	10 Dept 10XXX 10XXX 10XXX 10XXX	1010 1010 1010 1020	N (CT Pending)	Retrified PC N N N	ist Reviewed? N N N	Certifier Name Karen Davis A Karen Davis B Michael Ford			

Employee # 3 – Michael Ford

A. Select Michael Ford from the Pre Review list of individuals. .

UNIVERSITY of HOUSTON	Certification											
	_						Home	My Profile	Tutorial	Help -	About	Log Off
CERT	-		Critical	Effort Form	ns Pendi	ng Pre Review for (Current Rej	oorting Period				
Assignment Notification Pre Review Certify Post Review Reporting	Return to Home	Name Karen Davis A Karen Davis B Michael Ford	RP Code 053115 053115 053115	Sub Dept H0XXX H0XXX H0XXX	Title Cod 1010 1010 1020	e Pre Reviewed? C N (CT Pending) Y N	ertified? P N N N	ost Reviewed? N K N K N M	ertifier Name (aren Davis A (aren Davis B dichael Ford			

B. Michael's form has a suspense account. Therefore, it was placed in the Critical Category to alert the Pre Reviewer to take action. Suspense accounts need to be cleared (balance of \$0.00) in order for the form to advance to the Certifier. To clear the suspense, the Pre Reviewer will be making a cost transfer, transferring the full amount to the sponsored project. Also note, that the cost sharing has been pre-populated by ERS. The cost sharing percentage is part of the total commitment listed for this project. Click on the "12%" listed under Commitment column.

			Rej	University of Houston porting Period: 053115 (03/01/2015 - 05/31/2015)					
				Pre Review Effort Form					
Name: Michae	I, Ford		Employee ID: 555555	001	Title: Ass	ociate Professor			
SubDept: H0X	XX		Division: H0409		Title Code	e: 1020			
View Previous	y Certified Effort State	ments							
				Add Account Input as % Reset Form					
Commit	nent Payroll	Accounts				Cost Sharin	g	Total \$	Total %
		Sponsored.	Accounts						
<u> </u>	<u>\$6,441.86</u>	12% 00/30-5013- (52816)	H0064-B0001-G106020	Stress and Drug Use	\$	5450.27	10%	\$11,892.13	22%
12%	\$6,441.86	12%		Total Sponsored Accounts		\$5,450.27	10%	\$11,892.13	22%
		Control Sala	ary/Suspense/Payroll Cl	earing Accounts					
	<u>\$6,739.20</u>	12% 00730-2080-	10058-F0857-NA (32322)	PAYROLL SUSPENSE				\$6,739.20	12%
	\$6,739.20	12%		Total Control Salary/Suspense/Payroll Clearing Accounts		N/A			
		Non-Sponse	ored Accounts						
	\$41,321.60	76% 00730-1026-	10064-A0387-NA (10994)	EPSY FAC SAL	\$	-5450.27	-10%	\$35,871.33	66%
	\$41,321.60	76%		Total Non-Sponsored Accounts		\$-5,450.27	-10%	\$35,871.33	66%
	\$54,502.66	100%		Grand Total		\$0.00	0%	\$54,502.66	100%
				Notes				11	
				Maximum 800 characters					
			Exit Form	n Initiate CT Save Form Proceed H	lelp				
				Top Form Prev. Form					

C. Commitment detail shows a total of 12% effort committed on this project of which 10% is cost sharing. As a result, ERS pre-populated the Cost Sharing column with the cost sharing amount on the effort form. Click on Close Window.

Details	s for Awar	d 00730-50	13 -H 00) 64-	3000)1-G	6106	020 (5 2 8′	16) ·	- fo	r Re	epo	rtin	g Pe	erio	od (053 [.]	115										
Michael, F Appointm Reporting	ord ent: 12.0 Month: Period: 03/01/2	;)15 - 05/31/2015																											
								Awa	arded F	Period	04/0	1/2013	- 12/	31/201	5														
	Awarded Effort	Awarded Cost Sh	aring Apr	May J	un Ju	I Aug	Sep O	ct Nov	Dec J	an Fe	b Ma	r Apr	May	Jun	Jul Au	ug S	ep O	ct No	v De	c Jan	Feb	Mar A	pr Ma	y Ju	n Jul .	Aug	Sep O	ct No	v Dec
Percents	12	10	12	12	12 12	12	12 1	2 12	12 1	12 12	2 12	2 12	12	12	12 1	2 1	2 1	2 12	2 12	12	12	12 1	2 12	2 12	12	12	12 1	2 12	12
							Av	erage O	n Repo	orting	Peric	od 03/	01/20 ⁻	15 - 05	/31/20	015													
		Ave	rage Awar	ded Pa	id %			Α	verage	Awar	ded (Cost S	harin	ig %				Α	verag	e Aw	arded	Total	%						
			2								10										2								
										Clo	ise Wi	ndow)	•															

D. Click on Initiate CT. The form will be marked as 'CT Pending'.

	University of Houston Reporting Period: 053115 (03/01/2015 - 05/31/2015)										
				Pre Review Effort Form							
Name: Michael, F	ord	E	mplovee ID: 555555001		Title: Ass	ociate Professor					
SubDept: H0XXX		0	ivision: H0409		Title Code	: 1020					
View Previously C	ertified Effort Stater	nents									
			Add A	ccount) Input as % (Reset Form)							
Commitme	nt Pavroll	Accounts				Cost Sharin	a	Total \$	Total %		
		Sponsored Acco	unts				5				
<u>12%</u>	<u>\$6.441.86</u>	12% 00730-5013-H006 (52816)	4-B0001-G106020 Stres	s and Drug Use	\$	5450.27	10%	\$11,892.13	22%		
12%	\$6,441.86	12%	Total	Sponsored Accounts		\$5,450.27	10%	\$11,892.13	22%		
		Control Salary/S	uspense/Payroll Clearing	Accounts							
	<u>\$6.739.20</u>	12% 00730-2080-H005	8-F0857-NA (32322) PAYF	ROLL SUSPENSE				\$6,739.20	12%		
	\$6,739.20	12%	Total Acco	Control Salary/Suspense/Payroll Clearing unts	g	N/A					
		Non-Sponsored	Accounts								
	<u>\$41,321.60</u>	76% 00730-1026-H006	4-A0387-NA (10994) EPSY	FAC SAL	\$	-5450.27	-10%	\$35,871.33	66%		
	\$41,321.60	76%	Total	Non-Sponsored Accounts		\$-5,450.27	-10%	\$35,871.33	66%		
	<u>\$54,502.66</u>	100%	Gran	d Total		\$0.00	0%	\$54,502.66	100%		
				Notes Maximum 800 characters	3			1			
			Exit Form	Initiate CT Save Form Proceed	Help						
				Top Form Prev. Form							

E. Click Exit Form.

			F	University of Houston Reporting Period: 053115 (03/01/2015 - 05/31/2015)					
				Pre Review Effort Form					
Nam	e: Michael, Fo	rd	Employee ID: 5555	55001	Title: Ass	ociate Professor			
SubE	Dept: H0XXX		Division: H0409		Title Code	e: 1020			
View	Previously Ce	rtified Effort Statem	<u>nents</u>						
				Cost Transfer Pending					
				Add Account Input as % Reset Form					
	Commitment	Payroll	Accounts			Cost Sharing	9	Total \$	Total %
			Sponsored Accounts						
	<u>12%</u>	<u>\$6,441.86</u>	12% 00730-5013-H0064-B0001-G106020 (52816)	Stress and Drug Use	\$	5450.27	10%	\$11,892.13	22%
	12%	\$6,441.86	12%	Total Sponsored Accounts		\$5,450.27	10%	\$11,892.13	22%
			Control Salary/Suspense/Payroll	Clearing Accounts					
		<u>\$6,739.20</u>	12% 00730-2080-H0058-F0857-NA (3232	2) PAYROLL SUSPENSE				\$6,739.20	12%
		\$6,739.20	12%	Total Control Salary/Suspense/Payroll Clearing Accounts		N/A			
			Non-Sponsored Accounts						
		<u>\$41,321.60</u>	76% 00730-1026-H0064-A0387-NA (1099	4) EPSY FAC SAL	\$	-5450.27	-10%	\$35,871.33	66%
		\$41,321.60	76%	Total Non-Sponsored Accounts		\$-5,450.27	-10%	\$35,871.33	66%
		\$54,502.66	100%	Grand Total		\$0.00	0%	\$54,502.66	100%
				N					
				Maximum 800 charactors				11	
			(Exit Form Undo CT Pending Status Help					
				Top Form Prev. Form					

F. The status of Michael Ford's form now indicates 'N (CT Pending).

UNIVERSITY of	Certification										
	_					Home	My Profi	le Tutorial	Help -	About	Log Off
CERT		(Critical Effort For	ns Pendi	ng Pre Review for	Current Rep	orting Period				
		Name RI	Code Sub Dept	Title Cod	e Pre Reviewed?	Certified? Po	ost Reviewed?	Certifier Name			
Assignment		Karen Davis A 0	53115 H0XXX	1010	N (CT Pending)	N	N	Karen Davis A			
Notification		Michael, Ford 0	53115 H0XXX 53115 H0XXX	1010	N (CT Pending)	N	N	Michael Ford			
Pre Review	► <u>Return to Home</u>										
Certify											
Post Review											
Reporting											

G. Click on Return to Home.

Employee # 4 – James Barns

A. From the My Status/To Do, click on "1" listed under Pending Pre Review Prior Periods .

HOUSTON	Certification								
×				Home	My Profile	Tutorial	Help▼	About	Log Off
CERT	Departmental Coordin	ator							í
Assignment	Grant Adams						Y	our Assigned [lepartments.
Notification	-		Effort Fo	orm Status					
Pre Review		Completion Sta	atus: 0% for Curr	rent Reportin	g Period - 053115				
Certify	Total 0 or	t of 4 forms completed: 2 pending Pre-	Review: 2 pendin	o Certification:	0 pending Post Re	wiew 1 from Prior P	Periods		
Post Review		A of a terms completed, a pending i re	nonew, <u>s</u> perior	g oortineetion,	g pending r barrie		chidds.		
Reporting		_	My State	us / To Do	_	_			
		5	Pre R	leview	Post	Review			
			Pending	Critical	Pending	Pending Certification			
		Current Period (053115)	D	2	0	2			
		Prior Periods	► 1	0	0	O			

B. Select **James Barns** from the Pre Review list. James Barnes' form is for the summer reporting period.

JNIVERSITY of HOUSTON	Certification						T.				
	-					Home	My Profile	Tutorial	Help -	About	Log Off
CERT			Effort For	ms Pending	Pre Review I	rom Prior Pe	riods				
^		Name RP Code	Sub Dept	Title Code F	re Reviewed?	Certified? P	ost Reviewed?	Certifier Name			
Assignment		James Barnes 083114	HOXXX	1020	Ν	N	N	James Barnes			
Notification	Return to Home										
Pre Review											
Certify											
Post Review											
Reporting											

C. James' form represents a summer effort form. The Pre Reviewer notices that one of the accounts is not represented on the form. Pre Reviewer will add this account using the Add Account followed by the account search process. Click on **Add Account**.

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		Reporting Pe	University of Houston riod: 083114 (06/01/2014 - 08/31/2014)				
			Pre Review Effort Form				
Name: James Barne SubDept: H0XXX <u>View Previously Cer</u>	es tified Effort Statement	Employee ID: 777777001 Division: H0409 S	/	Title: Associate Professor Title Code: 1020			
Commitment	Payroll	Add Accounts	int Input as % Reset Form	Cost Sharing		Total \$	Total %
37%	\$18,009.32	37% 00730-5021-H0058-B0100-C108486 (55589)	UH A+ CHALLENGE NETW	\$ 0.00	0%	\$18,009.32	37%
18%	\$9,004.66	18% 00730-5021-H0058-B0100-C108487 (55594)	UH - A+ UP	\$ 0.00	0%	\$9,004.66	18%
55%	\$27,013.98	55%	Total Sponsored Accounts	\$0.00	0%	\$27,013.98	55%
		Non-Sponsored Accounts					
	<u>\$7,717.98</u>	16% 00730-1026-H0058-A0403-NA (19594)	EDUC SUMMER FAC SAL	\$ 0.00	0%	\$7,717.98	16%
	<u>\$3,858.99</u>	8% 00730-2064-H0058-A2089-NA (34215)	DT - SUMMER SUPPORT	\$ 0.00	0%	\$3,858.99	8%
	\$10,377.34	21% 00730-4041-H0058-D0073-NA (53266)	TEACH TO LEAD	\$ 0.00	0%	\$10,377.34	21%
	\$21,954.31	45%	Total Non-Sponsored Accounts	\$0.00	0%	\$21,954.31	45%
	<u>\$48,968.29</u>	100%	Grand Total	\$0.00	0%	\$48,968.29	100%
			Notes Maximum 800 characters			1.	
		Exit Form Initia	ate CT Save Form Proceed	Help			

D. Enter **00730-56793** for Project ID. Sponsored Account will be selected by default. Click on **Continue.**

Search Accounts	
Please input as much information as possible to narrow down the search. To perform a a search, enter at least the first character for Project ID or Fund or Dept . The system will return first 1,000 records that match the criteria entered. The search is case-insensitive.	
Choose Account Type, and input Project ID or Fund or Dept.	
Sponsored Account Non-Sponsored Account	
Project ID: 00730-56793	
Fund:	
Dept:	
Cancel Continue Help	

E. Select the account from the drop down. Account Description and the Account Status will automatically be selected. Click on **Add Account.**

	Add Account
You are going to add a Spo the status will be populated	nsored Account to James Barnes. Please select an Account to add to the form. The Account description and automatically.
Please select an Account automatically.	from the Account drop-down box. Account descriptions and Account Status will be populated
Account	00730-5013-H0064-B0001-G109074 (56793) V (Select an Account)
Account Description	PROJECT T.O.G.E.T.H. V
Account Status	A
	Cancel Add Account Help
	Please select a valid Account. Click here to start a new search.

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		l Reporting Per	University of Houston iod: 083114 (06/01/2014 - 08/31/2014)				
		P	Pre Review Effort Form				
Name: James Barnes		Employee ID: 777777001		Title: Associate Professor			
SubDept: H0XXX		Division: H0409		Title Code: 1020			
View Previously Certified Effor	rt Statements						
		Add Account	t Input as % Reset Form				
Commitment	Payroll	Accounts		Cost Sharing		Total \$	Total %
	1 uj ton	Sponsored Accounts		oostonunig		Total o	rotar //
\$	60.00	0% 00730-5013-H0064-B0001-G109074 (56793)	PROJECT T.O.G.E.T.H.	\$ O	0%	\$0.00	0%
<u>37%</u> \$18.00	<u>)9.32</u>	37% 00730-5021-H0058-B0100-C108486 (55589)	UH A+ CHALLENGE NETW	\$ 0.00	0%	\$18,009.32	37%
<u>18%</u> \$9.00	<u>)4.66</u>	18% 00730-5021-H0058-B0100-C108487 (55594)	UH - A+ UP	\$ 0.00	0%	\$9,004.66	18%
55% \$27,01	13.98	55%	Total Sponsored Accounts	\$0.00	0%	\$27,013.98	55%
		Non-Sponsored Accounts					
<u>\$7.71</u>	7.98	16% 00730-1026-H0058-A0403-NA (19594)	EDUC SUMMER FAC SAL	\$ 0.00	0%	\$7,717.98	16%
<u>\$3.85</u>	58.99	8% 00730-2064-H0058-A2089-NA (34215)	DT - SUMMER SUPPORT	\$ 0.00	0%	\$3,858.99	8%
<u>\$10,37</u>	7.34	21% 00730-4041-H0058-D0073-NA (53266)	TEACH TO LEAD	\$ 0.00	0%	\$10,377.34	21%
\$21,95	54.31	45%	Total Non-Sponsored Accounts	\$0.00	0%	\$21,954.31	45%
\$48,96	<u>58.29</u> 1	100%	Grand Total	\$0.00	0%	\$48,968.29	100%
			Notes			h	
		1	Maximum 800 characters				
		Exit Form Initiat	e CT Save Form Proceed Help	2			

G. Cost Transfer Pending is now displayed at the top of the form. Click on Exit Form.

		Reporting Pe	University of Houston eriod: 083114 (06/01/2014 - 08/31/2014)				
			Pre Review Effort Form				
Name: James Barnes SubDept: H0XXX <u>View Previously Certit</u>	; fied Effort Statements	Employee ID: 777777001 Division: H0409		Title: Associate Professor Title Code: 1020			
		Add Acco	• Cost Transfer Pending				
Commitment	Payroll	Accounts Sponsored Accounts		Cost Sharing		Total \$	Total %
	\$0.00	0% 00730-5013-H0064-B0001-G109074 (56793)	PROJECT T.O.G.E.T.H.	\$ 0.00	0%	\$0.00	0%
<u>37%</u>	<u>\$18,009.32</u>	37% 00730-5021-H0058-B0100-C108486 (55589)	UH A+ CHALLENGE NETW	\$ 0.00	0%	\$18,009.32	37%
18%	\$9,004.66	18% 00730-5021-H0058-B0100-C108487 (55594)	UH - A+ UP	\$ 0.00	0%	\$9,004.66	18%
55%	\$27,013.98	55%	Total Sponsored Accounts	\$0.00	0%	\$27,013.98	55%
		Non-Sponsored Accounts					
	<u>\$7,717.98</u>	16% 00730-1026-H0058-A0403-NA (19594)	EDUC SUMMER FAC SAL	\$ 0.00	0%	\$7,717.98	16%
	\$3,858.99	8% 00730-2064-H0058-A2089-NA (34215)	DT - SUMMER SUPPORT	\$ 0.00	0%	\$3,858.99	8%
	\$10.377.34	21% 00730-4041-H0058-D0073-NA (53266)	TEACH TO LEAD	\$ 0.00	0%	\$10,377.34	21%
	\$21,954.31	45%	Total Non-Sponsored Accounts	\$0.00	0%	\$21,954.31	45%
	<u>\$48,968.29</u>	100%	Grand Total	\$0.00	0%	\$48,968.29	100%
		L	Notes Maximum 800 characters				
		Exit Form	Undo CT Pending Status Help				

H. The Pre Review status for James Barns now reflects 'N (CT Pending)'. Click on Home.

UNIVERSITY of HOUSTON	Certification								
					Home	My Profile	Tutorial	Help - A	bout Log Off
CERT		Effo	ort Forms Pendi	ng Pre Review fro	m Prior Periods				
Assignment Notification Pre Review Certify Post Review Reporting	► <u>Return to Home</u>	Name (RP:Code)Sub James Barnes (083114 H0)	Dept Title Code XXX 1020	Pre Reviewed? C	<u>sertified? Post R</u> N	eviewed 2 <mark>/Certifie</mark> N James I	r Name Barnes		

I. Click on Log Off.

Home My Profile Tutorial Help + Abc CERT Departmental Coordinator Grant Adams Your Assi Assignment Oran Adams Your Assi Notification Pre Review Completion Status: 0% for Current Reporting Period - 053115 Vour Assi Cartify Post Review Total Qout of 4 forms completed; 2 pending Pre Review; 2 pending Certification; 9 pending Post Review. 1 from Prior Periods. My Status / To Do My Status / To Do Pre Review Pending Critical Pending Pending						Ī		anna an a				Certification	UNIVERSITY of
Certify Pre Review Cartify Post Review Completion Status : 0% for Current Reporting Period - 063115 Post Review Total Quit of 4 forms completed; 2 pending Pre Review; 2 pending Certification; 9 pending Post Review. 1 from Prior Periods.	Log Off	About	Help -	Tutorial	My Profile	me	Hor						
Assignment Notification Pre Review Certify Post Review Reporting My Status / To Do Pre Review Post Review Reporting Pre Review Post Review	1										nator	Departmental Coordinato	CERT
Assignment Notification Pre Review Completion Status: 0% for Current Reporting Period - 053115 Certify Post Review Reporting My Status / To Do Pre Review Post Rev	Departments.	our Assigned De	Y									Grant Adams	testerment.
Notification Effort Form Status Pre Review Completion Status: 0% for Current Reporting Period - 063115 Certify Total Qoutof 4 forms completed; 2 pending Pre Review; 2 pending Certification; 0 pending Post Review. 1 from Prior Periods. Reporting My Status / To Do Pre Review Post Review Pending Critical Pending Critical Pending Critical		/										-	Assignment
Pre Review Completion Status: 0% for Current Reporting Period - 063115 Cartify Total Qout of 4 forms completed; 2 pending Pre Review; 2 pending Certification; 0 pending Post Review. 1 from Prior Periods. Reporting My Status / To Do Pre Review Post Review Pending Critical Pending Critical Pending Critical		•						rm Status	Effort Fo				Notification
Certify Total 0 out of 4 forms completed; 2 pending Pre Review; 2 pending Certification; 0 pending Post Review. 1 from Prior Periods. Reporting My Status / To Do Pre Review Post Review Pending Critical Pending Pending Pending Critical Pending Pending						3115	g Period - 053	ent Reporting	us: 0% for Curr	Completion St			Pre Review
Post Review Post Review Post Review Reporting My Status / To Do										1			
Reporting Pro Review Post Review Pending Critical Pending Critical					w. Throm Phot Penods	ISL REVIEW	g pending Pos	Ceruncauon, j	eview, 2 perioling	or 4 forms completed, 2 pending Pre	i otal <u>o out</u>		Post Review
Profileg Preding Critical Pending Critical Pending Critical Pending													Reporting
Pro Review Post Review Pending Critical Pending Critical Pending								is / To Do	My Statu				
Pending Critical Pending Certification					riew	Post Revie	Pc	eview	Pre R				
					Pending Certification	Ce	Pending	Critical	Pending				
Current Period (053115) 0 <u>2</u> 0 <u>2</u>					2		0	2	0	Current Period (053115)			
Prior Periods <u>1</u> 00 00					0		0	0	1	Prior Periods			

Scenarios #3 and 4: CERTIFICATION

Certifier # 1 – Karen Davis B certifying her own form

Log on as Karen Davis B, a faculty member. Typically you will not be performing the role of a Certifier in the live environment; however, it is important to understand what the Certifier will be encountering.

A. Log on using your training User ID for Karen Davis B: 444444XXX and password temp.



SECURITY: You are about to view personal information. Your information will be protected by encryption as it travels across the web. To continue to protect the privacy of your information, you should completely exit your browser before you leave your computer. If you do not exit completely, the browser's caching capabilities may enable the next person using your computer to view your personal information.

B. Click on the '2' under Certification Pending in the Status/My To Do List Current Period.

Certification			and the second			
Certifier Karen Davis B		Home	My Profile	Tutorial	Help v About	Log Off
	- My Stat	us / To Do	Faction			
	, Current Period (053115)	Pending	Pending Pre Review 0			
	Prior Periods	0	0			
Search Er Employee Id	nployee Effort Forms Search	Accour	Search Er t Id	nployee Effort	Forms By Account	Search
	Certifier Karen Davis B	Certifier Karen Davis B	Employee Id Search Employee Effort Forms	Mome My Profile Certifier Karen Davis B Image: My Status / To Do Image: Pending Pending </td <td>Home My Profile Tutorial Certifier Karen Davis B Image: Certification periody of periody periody periody periody of periody periody of periody</td> <td>Home My Profile Tutorial Help+ About Certifier Karen Davis B Image: Certification Image: Certifi</td>	Home My Profile Tutorial Certifier Karen Davis B Image: Certification periody of periody periody periody periody of periody periody of periody	Home My Profile Tutorial Help+ About Certifier Karen Davis B Image: Certification Image: Certifi

C. Karen Davis B is certifying her form and effort related to her project for Jennifer Evans. Click on Karen Davis B.

HOUSTON	Certification		
	Home My Profile Tutorial Help	About	Log Off
CERT	Effort Forms Pending Certification for Current Reporting Period		
Certify	Name RP Code Sub Dept Title Code Pre Reviewed? Certified? Post Reviewed? Certified? Post Reviewed? Certified? Certified? Post Reviewed? Certified? Certified? <thcertified?< th=""> <thcerti< th=""><th></th><th></th></thcerti<></thcertified?<>		
	Line Item Effort Forms Pending Certification for Current Reporting Period		
	Name RP Code Sub Dept[Title Code Pre Reviewed? Certified? Post Reviewed? Certifier Name Jennifer Evans 053115 H0XXX T3D7 Y N Multiple		
	► <u>Return to Home</u>		

D. Certification form for Karen Davis B is presented. While reviewing this form, Karen determines that the effort reflected on the last sponsored project (00730-5015-H0288-B0001-G100232 (46963)) is not correct.

		Certify Effort Form				
e: Karen Davis B	Employ	ee ID: 444444001		Title: Prof	essor	
Previously Certifie	d Effort Statements	1. H0409		The Code		
	Pre	e Review Details Add Account Reset For	rm			
Commitment	Accounts		Payroll %	Cost Sharing %	Total %	Certified Effort %
20%	Sponsored Accounts 00730 5013 H0288 B0001 C104660 (50061)	TEXAS CENTER FOR LEA	13% *	7%	20%	20 %
15%	00730-5013-H0288-B0001-G104661 (50053)	TEXAS CENTER FOR LEA	11% *	1%	15%	15 %
0%	00730-5013-H0288-B0001-G107189 (53593)	A Follow-I In of Child	7% *	7%	1/1%	14 %
50%	00730-5015-H0288-B0001-G100232 (46963)		44%	0%	44%	44 %
85%	<u>33133 3513 110200 2000 1 0 100232 (40303)</u>	Total Sponsored Accounts:	75%	18%	93%	93%
	Non-Sponsored Accounts					
	00730-1101-H0288-C0633-NA (38604)	PUBLIC SCHOOLS PARTN	<u>7%</u>	0%	7%	7 %
	00730-2072-H0288-B1691-NA (34116)	TIMES IDC	<u>18%</u> *	-18%	0%	0 %
		Total Non-Sponsored Accounts:	25%	-18%	7%	7%
		Grand Total:	<u>100%</u>	0%	100%	100%
		Notes				
		Maximum 800 charac	ters			10

E. Karen will update the effort column on this project to change the effort percentage from 44 to **50**. To ensure the effort form totals 100%, Karen will also update the first non-sponsored account so that it now reflects **1**. Click **Proceed**.

	Rep	University of Houston orting Period: 053115 (03/01/2015 - 05/31/20	015)			
		Certify Effort Form				
Name: Karen Davis B	Employe	e ID: 44444001		Title: Prof	essor	
SubDept: H0XXX	Division	H0409		Title Code	: 1010	
View Previously Certifie	ed Effort Statements					
	Pre	Review Details Add Account Reset Fo	orm			
Commitment	Accounts		Payroll %	Cost Sharing %	Total %	Certified Effort %
	Sponsored Accounts		,	3		
<u>20%</u>	00730-5013-H0288-B0001-G104660 (50061)	TEXAS CENTER FOR LEA	13% *	7%	20%	20 %
<u>15%</u>	00730-5013-H0288-B0001-G104661 (50053)	TEXAS CENTER FOR LEA	<u>11%</u> *	4%	15%	15 %
0%	00730-5013-H0288-B0001-G107189 (53593)	A Follow-Up of Child	<u>7%</u> *	7%	14%	14 %
<u>50%</u>	00730-5015-H0288-B0001-G100232 (46963)	UNDERSTANDING MALLEA	44%	0%	44%	50 %
85%		Total Sponsored Accounts:	75%	18%	93%	99%
	Non-Sponsored Accounts					
	00730-1101-H0288-C0633-NA (38604)	PUBLIC SCHOOLS PARTN	<u>7%</u>	0%	7%	1 %
	00730-2072-H0288-B1691-NA (34116)	TIMES IDC	<u>18%</u> *	-18%	0%	0 %
		Total Non-Sponsored Accounts:	25%	-18%	7%	1%
		Grand Total:	<u>100%</u>	0%	100%	100%
		Notes				
		Maximum 800 chara	cters			2
* This percentage has h	peen adjusted through Pre Review. To view the details	s please click on Pre Review Details button				
Select Save Form to p	reserve the changes. Select the Notify button to notif	v your Pre Reviewer. Select Proceed button	to continue w	ith certification.		
	Exit For	m Save Form Proceed Notify	Help			
		1				

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F. Confirm the percentages as correct, review the Certification Checklist and read the Attestation Statement. If the Certifier agrees with the effort distributions, he/she will click *Certify.*

		University of Houston - Reporting Period: 053115 (03/01/2015	05/31/2015)			
		Certify Effort Form				
Name: Karen Davis B		Employee ID: 444444001		Title:	Professor	
SubDept: H0XXX		Division: H0409		Title	Code: 1010	
Accounts			Payroll %	Cost Sharing %	Total %	Certified Effort %
Sponsored Accounts						
00730-5013-H0288-B000	1-G104660 (50061)	TEXAS CENTER FOR LEA	<u>13%</u> *	7%	20%	20%
00730-5013-H0288-B000	1-G104661 (50053)	TEXAS CENTER FOR LEA	<u>11%</u> *	4%	15%	15%
00730-5013-H0288-B000	<u>1-G107189 (53593)</u>	A Follow-Up of Child	<u>7%</u> *	7%	14%	14%
00730-5015-H0288-B000	<u>1-G100232 (46963)</u>	UNDERSTANDING MALLEA	44%	0%	44%	50%
		Total Sponsored Accounts:	75%	18%	93%	99%
Non-Sponsored Accou	nts		704	001		101
00730-1101-H0288-C063	<u>33-NA (38604)</u>	PUBLIC SCHOOLS PARTN	<u>7%</u>	0%	7%	1%
00730-2072-H0288-B169	1-NA (34116)	TIMES IDC	<u>18%</u> *	-18%	0%	0%
		Total Non-Sponsored Accounts:	25%	-18%	7%	1%
		Grand Total:	<u>100%</u>	0%	100%	100%
	Certification Che	ecklist - Please make sure you have completed Info on ERS Effort Reporting Policy Remember Cost Sharing Are all grants listed? FAQ Federal Uniform Guidance	all the steps i	n the checklist below		
If all informa	tion above is correct, please click	on Certify. Click on Return to return to the initia	l form. Click or	Exit Form to return to	o the list.	7
	I confirm that the distribution the stated period or in the eve Means of Verification, to revie I understand that falsification actions under the federal Fals	of activity represents a reasonable estimate of ant that I am reviewing effort for someone othe w on behalf of this employee. of effort statements may result in potential dis the Claims Act.	all work perfc r than myself, allowed costs	prmed by me during that I have Suitable , penalties and/or r Effort Administrator.		
		Exit Form Return Hel	2			-

G. Review the Certified Effort Statement, including Certifier name and date certified, and email confirmation that was generated to the Post Reviewer to reconcile the differences. Click *Exit Form.*

	University of Houston - Reporting Period: 053115 (03/01/2015	05/31/2015)			
	Certified Effort Statement				
Name: Karen Davis B SubDept: H0XXX /iew Previously Certified Effort Statements	Employee ID: 44444001 Division: H0409		Title: Professor Title Code: 1010		POI Addee
Accounts		Payroll %	Cost Sharing %	Total %	Certified Effort %
Sponsored Accounts 00730-5013-H0288-B0001-G104660 (50061) 00730-5013-H0288-B0001-G104661 (50053) 00730-5013-H0288-B0001-G107189 (53593) 00730-5015-H0288-B0001-G100232 (46963)	TEXAS CENTER FOR LEA TEXAS CENTER FOR LEA A Follow-Up of Child UNDERSTANDING MALLEA Total Sponsored Accounts:	<u>13%</u> <u>11%</u> <u>7%</u> <u>44%</u> 75%	7% 4% 7% 0% 18%	20% 15% 14% 44% 93%	20% 15% 14% 50% 99%
Non-Sponsored Accounts 00730-1101-110288-C633-NA (38604) 00730-2072-H0288-B1691-NA (34116)	PUBLIC SCHOOLS PARTN TIMES IDC Total Non-Sponsored Accounts:	7% 18% 25%	0% -18% - 18% 0%	7% 0% 7%	1% 0% 1%
Notes: N/A I confirm that the distribution of activity rep effort for someone other than myself, that I	presents a reasonable estimate of all work performed b have Suitable Means of Verification, to review on beh	by me during t alf of this emp	he stated period or in loyee.	the event that	I am reviewing
I understand that falsification of effort state Form Form	ments may result in potential disallowed costs, penalt Certified By: Karen D. Certified On: 07/01/20	ties and/or act avis B 015	ions under the federal	False Claims	Act.
This Effort Form has been successfully Ce a PDF version of this effort form.	rtified. If you would like a hard copy of the effort form, pre	ess the printer i	con in the top right com	er. Press the F	DF icon to download
If you would like to make changes o	on this certified effort form, please click <u>here</u> .				

H. A "Y" in the Certified column indicates the form has been certified.

UNIVERSITY of	Certification	
	Home My Profile Tutorial Help - About Lo	og Off
CERT	Effort Forms Pending Certification for Current Reporting Period	
Certify	Name [RP Code]Sub Dept[Title Code]Pre Reviewed?[Certified?]Post Reviewed?[Certifier Name Karen Davis B 053115 H0XXX 1010 Y N Karen Davis B	
	Line Item Effort Forms Pending Certification for Current Reporting Period	
	Name RP Code Sub Dept Title Code Pre Reviewed? Certified? Post Reviewed? Certifier Name Jennifer Evans 053115 H0XXX T3D7 Y N Multiple	
	► <u>Return to Home</u>	

Certifier # 1 – Karen Davis B certifying her projects on Jennifer Evans' form.

Next, Karen Davis B will be certifying the effort Jennifer Evans devoted to her project. This process is called 'Line Item Certification'.

A. Click on Jennifer Evans located under Line Item Effort Forms section.

Home My Profile Tutorial Help CERT Effort Forms Pending Certification for Current Reporting Period	 About 	Log Off
CERT Effort Forms Pending Certification for Current Reporting Period		
Name RP Code Sub Dept Title Code Pre Reviewed? Certified? Post Reviewed? Certified? Pos		
Line Item Effort Forms Pending Certification for Current Reporting Period Name RP Code Sub Dept Title Code Pre Reviewed? Certified? Post Reviewed? Certifier Name Jennifer Evans 053115 H0XXX T3D7 Y N Multiple	-	

B. The Line Item Effort Form looks similar to the form Karen Davis B certified in the previous example. Karen's project is currently showing 6% of effort. The remaining project will be certified by Michael Ford. Karen reviewed the form and confirmed that the effort is reflected correctly. Click **Proceed**.

		Reporting Period: 0531	15 (03/01/2	on)15 - 05/31/201	5)					
		Certify E	ffort Form							
ame: Jennifer Evans	Employee ID:	888888001		Title: Resear	cher 2 Nat I	Phys Science				
SubDept: H0XXX Division: H0409 Title Code: T3D7										
		Pre Review Details	dd Account	Reset Form	n					
Commitment Ac	ccounts	1	ayroll %	Cost Sharing	6 Total % (Certified Effort %	Status			
Sp	consored Accounts		500/	00/	500/	500/				
00.	730-5013-H0288-B0001-G101915 (48475)	ARITHMETICAL AND COG	<u>50%</u>	0%	50%	50%	Pending Certification - Michael, Ford			
00.	//30-5013-H0288-B0001-G101970 (48264)	USING LONGITUDINAL A	<u>6%</u>	0%	6%	6 %	Available for Certification			
Na	on Sponsored Assounts	Total Sponsored Accounts:	56%	0%	56%	56%				
00	0730-2080-H0288-B1672-NA (32522)	TE IAS LEE TRAINING	11%	0%	11%	44%				
001	Tota	I Non-Sponsored Accounts:	44%	0%	44%	44%				
	100	Grand Total:	100%	0%	100%	100%				
		No	tes Maximi	ım 800 charact	ers		æ			
elect Save Form to pr	reserve the changes. Select the Notify but	ton to notify your Pre Reviewer	Select Pr	oceed button to	continue w	ith certification.				
		Exit Form Save Form	Proceed	Notify	Help					
		/								

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University of Houston Reporting Period: 053115 (03/01/2015 - 05/31/2015)											
Certify Effort Form											
Name: Jennifer Evans SubDept: H0XXX	Employee ID: 888888001 Division: H0409		Title: Researche Title Code: T3D	er 2 Nat Phy 7	/s Science						
Accounts		Payroll %	Cost Sharing %	Total %	Certified Effort %	Status					
Sponsored Accounts 00730-5013-H0288-B0001-G101970 (48264)	USING LONGITUDINAL A Total Sponsored Accounts:	<u>6%</u> : 6%	0% 0%	6% 6%	6% 6%	Available for Certification					
Notes: N/A Certification Checklist - Please make sure you have completed all the steps in the checklist below info on ERS iffort Reporting Policy Remember Cost Sharing Are all grants listed? FAQ											
If all information above is correc	t, please click on Certify. Click on Return	to return to ti	ne initial form. Click	on Exit For	m to return to the list	i.					
I confirm that the distribution of activity represents a reasonable estimate of all work performed by me during the stated period or in the event that I am reviewing effort for someone other than myself, that I have Suitable Means of Verification, to review on behalf of this employee. I understand that falsification of effort statements may result in potential disallowed costs, penalties and/or actions under the federal False Claims Act.											
If the information a	bove does not reflect your Effort, Do Not C	Certify. Click o	on <u>Notify</u> to email yo	ur Effort Ad	ministrator.						
	Exit Form	Return	Help								

D. Certification is now complete. Click on Exit Form.

University of Houston Reporting Period: 053115 (03/01/2015 - 05/31/2015)												
Certified Effort Statement												
Name: Jennifer Evans SubDept: H0XXX <u>View Previously Certified Effort Statements</u>	Employee ID: 888888001 Division: H0409		Title: Title	: Researcher 2 Code: T3D7	Nat Phys S	cience						
Accounts	Р	ayroll % Co	st Sharing	% Total % Ce	rtified Effor	t % Status						
Sponsored Accounts 00730-5013-H0288-B0001-G101970 (48	264) USING LONGITUDINAL A Total Sponsored Accounts:	<u>6%</u> 6%	0% 0%	6% 6%	6% 6%	Certified by Karen Davis B on 2015-07-01 17:20:51.519						
Notes: N/A												
I confirm that the distribution of effort for someone other than m	activity represents a reasonable of yself, that I have Suitable Means of	estimate of a of Verificatio	ll work per n, to reviev	rformed by me w on behalf of	during the this employ	stated period or in the event that I am reviewing yee.						
I understand that falsification of	effort statements may result in po	otential disal	lowed cos	ts, penalties a	nd/or actior	ns under the federal False Claims Act.						
This Effort Form has been succe a PDF version of this effort form.	This Effort Form has been successfully Certified. If you would like a hard copy of the effort form, press the printer icon in the top right corner. Press the PDF icon to download a PDF version of this effort form.											
If you would like to mak	e changes on this certified effort for	m, please clic	ck <u>here</u> .									

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UNIVERSITY of HOUSTON	Certification	
	Home My Profile Tutorial Help v About	Log Off
CERT	Effort Forms Pending Certification for Current Reporting Period	
Certify	Name RP Code Sub Dept Title Code Pre Reviewed? Certified? Post Reviewed? Certifier Name Karen Davis B 053115 H0XXX 1010 Y Y N Karen Davis B	
	Line Item Effort Forms Pending Certification for Current Reporting Period	
	Name RP Code Sub Dept Title Code Pre Reviewed? Certified? Post Reviewed? Certifier Name Jennifer Evans 053115 H0XXX T3D7 Y Y Multiple Return to Home Keturn to Home	

F. The 'My Status/To Do' for Karen Davis B now doesn't have any pending forms. Click on Log Off.

UNIVERSITY of HOUSTON	Certification								
216- 				Home	My Profile	Tutorial	Help -	About	Log Off
CERT	Certifier Karen Davis B							/	
			My Sta	tus / To Do		_			
	🗖 Sear	Co ch Employee Effort Forms	ngratulations! You do	not have any	To-Do Items Search En	nployee Effort	Forms By A	ccount	
	Employee Id	Sear	ħ	Account I	d			C	Search

Scenario #4: CERTIFICATION

Certifier # 2 – Michael Ford certifying his project on Jennifer Evans' form.

A. Log on as Michael Ford by entering training user ID: 555555XXX and password temp.

User ID: 555555XXX Password: Login ERS Help Desk phone (xxx) 555-1000 email ershelpdesk@maximus.com	Effort Reporting System
---	-----------------------------------

B. Click on the '1' under Certification Pending in the Status/My To Do List Current Period. Michael's own form has not finished Pre Review yet, and therefore, not available for certification.

HOUSTON	Certification				and the second			
				Home	My Profile	Tutorial	Help - About	Log Off
CERT	Certifier							
Cortifu	Michael, Ford							
Ceruiy								
		_	My Stat	us / To Do				
				Cert	fication			
				Pending	Pending Pre Review			
			Current Period (053115)	1	1			
			Prior Periods	0	O			
	- Searct	Employee Effort For	ms		Search E	mployee Effort	Forms By Account	
	Employee Id		earch	Accour	t Id			Search

C. Select **Jennifer Evans** from the list. The effort form is located in a section titled "Line Item Effort Forms". Review the Effort Form. Michael Ford can only certify effort as it relates to his project(s).

HOUSTON	Certification
	Home My Profile Tutorial Help- About Log Off
CERT	Effort Forms Pending Certification for Current Reporting Period
Certify	Name RP Code Sub Dept Title Code Pre Reviewed? Certified? Post Reviewed? Certifier Name No Pending Effort Forms
	Line Item Effort Forms Pending Certification for Current Reporting Period
	Name RP Code Sub Dept Title Code Pre Reviewed? Certified? Post Reviewed? Certifier Name Jennifer Evans 053115 H0XXX T3D7 Y N (saved) N Multiple
	▶ <u>Return to Home</u>

D. Review the Effort Form. Michael determines that percentages are correct and will click **Proceed**.

				Reporting P	University of Veriod: 053115	of Houston (03/01/2015	- 05/31/2015))		
					Certify Ef	fort Form				
Name	e: Jennifer Evar	ns	Employee	ID: 888888001	oorary En	Т	itle: Researc	her 2 Nat Phys	Science	
SubD View I	SubDept: H0XXX Division: H0409 Title Code: T3D7 View Previously Certified Effort Statements									
				Pre Review D	Details Add	d Account	Reset Form			
	Commitment	Accounts			Payroll % C	Cost Sharing	% Total % 0	Certified Effort %	% Status	
		Sponsored Accounts				5				
		00730-5013-H0288-B0001-G1019) <u>15 (48475)</u> A	ARITHMETICAL AND CO	G <u>50%</u>	0%	50%	50 %	Available for Certification	
		00730-5013-H0288-B0001-G1019	70 (48264) U	JSING LONGITUDINAL A	<u>6%</u>	0%	6%	6%	Certified by Karen Davis B on 2015-07-01 17:20:51.519	
			1	otal Sponsored Account	s: 56%	0%	56%	56%		
		Non-Sponsored Accounts								
		00730-2080-H0288-B1672-NA (32	2522) 1	EJAS LEE TRAINING	44%	0%	44%	44%		
			Total	Non-Sponsored Account	s: 44%	0%	44%	44%		
				Grand Tota	al: <u>100%</u>	0%	100%	100%		
					Note	es Maximum 8	300 character	°S	ß	
Selec	t Save Form to	o preserve the changes. Select the	e Notify butte	on to notify your Pre Revie Exit Form	wer. Select Pr	roceed button	to continue Notify H	with certification.		

E. Confirm the percentages are correct once again, review the Certification Checklist and read the Attestation Statement. If the Certifier agrees with the effort distribution *Certify.*

University of Houston Reporting Period: 053115 (03/01/2015)											
Certify Effort Form											
Name: Jennifer Evans SubDept: H0XXX	Employee ID: 888888001 Division: H0409		Title: Researcher Title Code: T3D7	2 Nat Phys	Science						
Accounts		Payroll %	Cost Sharing %	Total %	Certified Effort %	Status					
Sponsored Accounts 00730-5013-H0288-B0001-G101915 (48475)	ARITHMETICAL AND COG Total Sponsored Accounts:	<u>50%</u> 50%	0% 0%	50% 50%	50% 50%	Available for Certification					
Notes: N/A Certification Checklist - Please make sure you have completed all the steps in the checklist below • Info on ERS Effort Reporting Policy • Remember Cost Sharing • Are all grants listed? • Endered Uniferent Guidenne											
If all information above is I confirm that th period or in the to review on bet U understand the the federal Fails If the information	correct, please click on Certify. Click on Return to e distribution of activity represents a reasonable event that I am reviewing effort for someone oth half of this employee. It falsification of effort statements may result in p Claims Act.	e estimate of a ler than myse potential disa Certify Click on <u>Notif</u>	initial form. Click on I all work performed b If, that I have Suitab Howed costs, penalt	Exit Form to by me during le Means of ies and/or a Administrato	return to the list. the stated Verification, ctions under r.						
	Exit Form	Return	Help								

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F. The effort form has now been certified. Click Exit Form.

University of Houston Reporting Period: 053115 (03/01/2015 - 05/31/2015)								
		Certified Effort	Statement					
		Continue Enore	otatomont			1-1		
Name: Jennifer Evans	Employee ID: 888888001	Ti	tle: Researcher 2	Nat Phys Science				
SubDept: HUXXX	Division: H0409	Title Code: T3D7						
View Previously Certified Effort Statements								
Accounts	F	Payroll % Cost Sha	ring % Total %	Certified Effort %	6 Status			
Sponsored Accounts		500/	500/	500/				
00730-5013-H0288-B0001-G101915 (48475)	ARTIHMETICAL AND COG	50% 0%	50%	50%	Certified by Michael Ford on 2015-07-01 17:24:07.160			
	Total Sponsoleu Accounts.	5070 070	5078	50%				
Notes: N/A								
I confirm that the distribution of act other than myself, that I have Suitab	ivity represents a reasonable estimat le Means of Verification, to review o	e of all work perform n behalf of this empl	ed by me during oyee.	g the stated period	l or in the event that I am reviewing effort for someone			
I understand that falsification of effo	ort statements may result in potential	disallowed costs, p	enalties and/or a	ctions under the f	ederal False Claims Act.			
This Effort Form has been successf of this effort form.	ully Certified. If you would like a hard	copy of the effort form	, press the printe	r icon in the top rig	ht corner. Press the PDF icon to download a PDF version			
		Exit Form Pre	Review Details					
If you would like to make c	hanges on this certified effort form, plea	ase click <u>here</u> .						

G. Jennifer Evans' form certification status now reflects "Y" under Certified? Status. Click on Log Off.

HOUSTON	Certification								
	Home My Profile Tutorial Help - About Log Off								
CERT	Effort Forms Pending Certification for Current Reporting Period								
Certify	Name RP Code Sub Dept Title Code Pre Reviewed? Certified? Post Reviewed? Certifier Name No Pending Effort Forms								
	Line Item Effort Forms Pending Certification for Current Reporting Period Name IRP Code Summe Reviewed? Certified? Post Reviewed?								

Scenario #5: POST REVIEW

Log on to the system as the Departmental Coordinator **Grant Adams** using your USERID **111111XXX** and your Password **temp** (all lower case, no quotations).

User ID: 111111XXX Password:	
	ETTORI Reporting System
phone (xxx) 555-1000 email	
ershelpdesk@maximus.com	

A. Click on number '1' located under Post Review Pending box.

UNIVERSITY of	Certification										
				Home	My Prof	ile Tutorial	Help -	About	Log Off		
CERT	Departmental Coordina	tor									
<u>^</u>	Grant Adams							Your Assigne	ed Departments.		
Assignment											
Notification	-		Effort Fo	rm Status	i.						
Pre Review		Completion Status: 25% for Current Reporting Period - 053115									
Certify											
Post Review	Total	1 out of 4 forms completed; 2 pending Pre	Review; 0 pendin	Certification;	1 pending Post R	eview. 1 from Prior Per	ods.				
Reporting	-		My Statu	s / To Do							
		1.2									
			Pre R	eview	Post	Review					
			Pending	Critical	Pending	Pending Certification					
		Current Period (053115)	0	2	1	0					
		Prior Periods	1	0	0	0					

B. Click on Karen Davis B.

UNIVERSITY of HOUSTON	Certification		N			mark					
					Home	e My F	Profile	Tutorial	Help -	About	Log Off
CERT	_	Effe	ort Forms P	ending Post	Review for Cur	rent Report	ing Perio	d			
		Name RP Cod	e Sub Dept	Title Code P	re Reviewed?	ertified? P	ost Revie	wed? Certifier	Name		
Assignment		Karen Davis B 053115	HOXXX	1010	Y	Y	N	Karen D	avis B		
Notification	► <u>Return to Home</u>										
Pre Review											
Certify											
Post Review											
Reporting											

C. Post Review Summary screen is presented highlighting the differences between the percentages from Pre Review and Certification. Click *Proceed*.

	University of Houston Reporting Period: 053115 (03/01/2015 - 05/31/2015)										
	Post Review Effort Summary										
Name: Karen Davis B SubDept: H0XXX <u>View Previously Certified</u>	Effort Statements	Employee ID: 44444001 Division: H0409	Title: Professor Title Code: 1010								
Commitment	Accounts		% From Pre Review	% Certified	% Difference						
	Sponsored Accounts										
20%	00730-5013-H0288-B0001-G104660 (50061)	TEXAS CENTER FOR LEA	20%	20%	0%						
<u>15%</u>	00730-5013-H0288-B0001-G104661 (50053)	TEXAS CENTER FOR LEA	<u>15%</u>	15%	0%						
0%	00730-5013-H0288-B0001-G107189 (53593)	A Follow-Up of Child	14%	14%	0%						
<u>50%</u>	00730-5015-H0288-B0001-G100232 (46963)	UNDERSTANDING MALLEA	44%	50%	6%						
85%		Total Sponsored Accounts:	93%	99%	6%						
	Non-Sponsored Accounts										
	00730-1101-H0288-C0633-NA (38604)	PUBLIC SCHOOLS PARTN	7%	1%	-6%						
	00730-2072-H0288-B1691-NA (34116)	TIMES IDC new	0%	0%	0%						
		Total Non-Sponsored Accounts:	7%	1%	-6%						
		Grand Total:	100%	100%	0%						
		Exit Form Notify Proceed	-								

D. Post Review screen looks similar to the Pre Review screen. Post Reviewer can view the effort form at the Pre Review stage, if necessary. Grant Adams determines that the differences should be defined as a Cost Transfer. Click Initiate CT.

University of Houston Reporting Period: 053115 (03/01/2015 - 05/31/2015)										
		Post	Review Effort Form							
Name: Karen Davis B SubDept: H0XXX <u>View Previously Certifie</u>		Title: Professor Title Code: 1010								
Commitment	Differences	Pre Review Details Certifi	cation Details Input as % Re	eset Form	t Sharing	Total \$	Total %			
		Sponsored Accounts								
<u>20%</u>	\$0.00	0% 00730-5013-H0288-B0001-G104660 (50061)	TEXAS CENTER FOR LEA	\$ 0	0.00 0%	\$0.00	0%			
<u>15%</u>	\$0.00	0% 00730-5013-H0288-B0001-G104661 (50053)	TEXAS CENTER FOR LEA	\$ <u></u>	0.00 0%	\$0.00	0%			
<u>0%</u>	\$0.00	0% 00730-5013-H0288-B0001-G107189 (53593)	A Follow-Up of Child	\$ C	0.00	\$0.00	0%			
<u>50%</u>	\$4,319.21	6% 00730-5015-H0288-B0001-G100232 (46963)	UNDERSTANDING MALLEA	\$ C	.00	\$0.00	0%			
85%			Total Sponsored Accounts:	: \$0	0.00	\$0.00	0%			
		Non-Sponsored Accounts								
	\$-4,319.21	-6% 00730-1101-H0288-C0633-NA (38604)	PUBLIC SCHOOLS PARTN	\$ C	0.00	\$0.00	0%			
	\$0.00	0% 00730-2072-H0288-B1691-NA (34116)	TIMES IDC new	\$ C	0%	\$0.00	0%			
			Total Non-Sponsored Accounts:	: \$0	0.00 0%	\$0.00	0%			
	\$0.00	0%	Grand Total:	: \$0	0.00 0%	\$0.00	0%			
Notes: N/A			Notes Maximum 500 cha	aracters		li.				
		Exit Form Back Initiate CT	Save Form Proceed N	lotify Help)					

E. Post Review form will now have the status of Cost Transfer Pending. Click on **Exit** Form.

University of Houston Reporting Period: 053115 (03/01/2015 - 05/31/2015)									
Post Deview Effort Form									
Nama: Karan Davia B	Foar Care Davie B Employed D: 44444001 Title: Defessor								
Name: Kalen Davis D Employee ID: 444444001					Title.	Code: 1010			
View Previously Certified			1100	Code. 1010					
Cost Transfer Pending									
Pre Review Details Certification Details Innuit as % Reset Form									
Commitment	Differences	Accounts		0.001101111	Cost Sharing		Total \$	Total %	
	Dimotoriooo	Sponsored Accounts			oootonanng			rotar ro	
20%	\$0.00	0% 00730-5013-H0288-B0001-G104660 (50061)	TEXAS CENTER FOR LEA	\$	0.00	0%	\$0.00	0%	
<u>15%</u>	\$0.00	0% 00730-5013-H0288-B0001-G104661 (50053)	TEXAS CENTER FOR LEA	\$	0.00	0%	\$0.00	0%	
0%	\$0.00	0% 00730-5013-H0288-B0001-G107189 (53593)	A Follow-Up of Child	\$	0.00	0%	\$0.00	0%	
<u>50%</u>	\$4,319.21	6% 00730-5015-H0288-B0001-G100232 (46963)	UNDERSTANDING MALLEA	\$	0.00	0%	\$0.00	0%	
85%			Total Sponsored Accounts	:	\$0.00	0%	\$0.00	0%	
		Non-Sponsored Accounts							
	\$-4,319.21	-6% 00730-1101-H0288-C0633-NA (38604)	PUBLIC SCHOOLS PARTN	\$	0.00	0%	\$0.00	0%	
	\$0.00	0% 00730-2072-H0288-B1691-NA (34116)	TIMES IDC new	\$	0.00	0%	\$0.00	0%	
			Total Non-Sponsored Accounts	:	\$0.00	0%	\$0.00	0%	
	\$0.00	0%	Grand Total	:	\$0.00	0%	\$0.00	0%	
Notes:		/	Notoo						
N/A			Notes Maximum 500 ch	aracters			li		
			maximum 500 cm						
		Exit Form Back U	ndo CT Pending Status Notify	Help					

F. Post Review form will now have the status of N(CT Pending). Click on **Return to Home**.

UNIVERSITY of HOUSTON	Certification				
		Home My Profile Tutorial	Help +	About	Log Off
CERT		Effort Forms Pending Post Review for Current Reporting Period			
Assignment	Return to Home	Name IRP Code Sub Dept Title Code Pre Reviewed? Certified? Post Reviewed? Certifier Name Karen Davis B 053115 H0XXX 1010 Y Y N (CT Pending) Karen Davis B			
Pre Review					
Certify					
Post Review					
Reporting					

Scenario #6: REPORTING

Click on the 1 out of 4 link located on the Dashboard. This will take the user to the Comprehensive Status Report reflecting the details for the current reporting period.

UNIVERSITY of HOUSTON	Certification
	Home My Profile Tutorial Help+ About Log Off
CERT	Departmental Coordinator
Assignment	Grant Adams Your Assigned Departments
Notification	Effort Form Status
Pre Review	Completion Status: 25% for Current Reporting Period - 053115
Post Review	Total 1 out of 4 forms completed; 2 pending Pre Review; 9 pending Certification; 1 pending Post Review, 1 from Prior Periods.
Reporting	

This report provides the details for Pre Review, Certification, Post Review and Completed Forms.

	Comprehensive Status Report (053115)									
Completed = 1 Completed = 1 Completed = 1 Pending Pre Review = 2 Pending Pre Review = 2 Pending Pre Review = 1										
			Form Pending Pre Re	eview		Top				
Employee ID	Employee Name	Sub Dept	¢ Dept ¢	Pre Reviewer 🗢	Status ¢	RCT Date \$	Amount \$			
666666001	Karen Davis A	H0XXX	HOXXX	Grant Adams	Pending (CT)		\$66,781.16			
<u>555555001</u>	Michael, Ford	H0XXX	HOXXX	Grant Adams	Pending (CT)		\$6,441.86			
						Sub Total:	\$73,223.02			
Displaying 2 of 2 i	records									
			Form Pending Certific	cation		Тор				
Employee ID 💠	Employee + Sub	Dept ¢ Dept	Pre Reviewer	Date Reviewed ¢ 0	Certifier ¢ Sta	tus ¢ RCT Date	¢ Amount ¢			
	Name									
Displaying 0 of 0	recorde					Sub Tot	al: \$0.00			
Displaying 0 01 01	records									
			Form Pending Post R	eview		Top				
Employee ID	mployee Name \$\$\$ Sub Dept \$	Dept ¢ Ret	Pre o Date o viewer Reviewed	Certifier \$ Data Certif	e _{\$} Post _{\$} ied Reviewer \$	Status ¢ RCT Da	te 🕈 Amount 🗢			
44444001 Kar B	ren Davis H0XXX	H0XXX Gran	nt Adams 28-Jun-15	Karen Davis 28-Ju B	in-15 Grant Adams	Pending (CT) 2015-0	6-26 \$71,481.32			
						Sub	Fotal: \$71,481.32			
Displaying 1 of 1	records									
			Form Completed	1		<u>Top</u>				
Employee ID \$	Employee Name \$ Sub Dep	t + Dept +	Pre Reviewer \$ Dat Revie	te wed Certifier ¢	Date ¢ Certified I	Post Reviewer Reviewed	♦ RCT Date ♦			
<u>888888001</u> Je	ennifer Evans H0XXX	K HOXXX	Grant Adams 26-J	un-15 Michael, Ford	28-Jun-15 N	ot Required				
Displaying 1 of 1	records									
			EXCEL V	Download						

Click on *Reporting* in the Menu at the left of the home screen.

UNIVERSITY of HOUSTON	Certification										
						Home	My Profile	Tutorial	Help▼	About	Log Off
CERT	Departmental Coordinato	r									
Assignment	Grant Adams									Your Assigne	ed <u>Departments</u> .
Notification					Effort Form	n Status					
Pre Review		-	Comp	pletion Status	: 25% for Currer	nt Reporting Period - 0	53115				
Certify		Total (and of (former annulated 2	esertine Des Re	uinus 8 ann finn 6	additional and and the De	at Barrison 4 from Dri	n Daviada			
Post Review		Total Total 4	torms completed, <u>≥</u> p	pending Pre Re	view, <u>o</u> pending c	verdincation, <u>i</u> pending PC	st Review. 1 from Pri	or Periods.			
Reporting											

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Example: Effort Forms Not Completed

A. Click on the desired Reporting Period (053115).

UNIVERSITY of HOUSTON	Certification				ī				
	-			Home	My Profile	Tutorial	Help -	About	Log Off
CERT			Reporting						
		Effort Forn	n Not Completed						
Assignment	Current Period 053115	g Period	2015-03-01	2015	-05-31				
Notification	113014		2014-09-01	2014	-11-30				
Pre Review	<u>083114</u>		2014-06-01	2014	-08-31				
Certify									
Post Review									
Reporting									

B. Check the department. Click Proceed.

UNIVERSITY of	Certification				T.				
				Home	My Profile	Tutorial	Help 🕶	About	Log Off
CERT			Effort Form Not	Completed					
Assignment		Selection	Check All Department H0XXX	Depar DC Trair	Clear All tment Name ing Department				
Pre Review Certify Post Review			Procee						
Reporting									

C. This report will display all effort forms that have not been completed.

HOUSTON	Certification							
					Home My Pro	file Tutorial	Help + About	Log Off
CERT				Reporting				
Annianananat	1		Effo	rt Form Not Completed (05	3115)	11 1 31 312 March March		_
Assignment	Division ¢	Sub Dept 🔶	Employee ID	Employee Name	Title Code 💠	Assigned Certifier 💠	Form Status	٠
Notification								
Dee Deview	H0409	HOXXX	666666001	Karen Davis A	1010	Karen Davis A	Pending PreReview	
Pre Review	H0409	HOXXX	44444001	Karen Davis B	1010	Karen Davis B	Pending PostReview	
Certify	H0409	HOXXX	555555001	Michael, Ford	1020	Michael, Ford	Pending PreReview	
Post Review Reporting	Displaying 3 of 3 rec	ords		EXCEL	l			

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Example: Line Item Eligibility Report

A. Click on the desired Reporting Period (053115). Select the desired department followed by subdepartment.

UNIVERSITY of	Certification				
		Home My Prof	ile Tutorial	Help• About	Log Off
CERT		Reporting			
Assignment Notification Pre Review Certify Post Review Reporting	Reporting Period Current Period 053115 113014 083114	Line Item Eligibility Start Date 2015-03-01 2014-09-01 2014-06-01	End Date 2015-05-31 2014-11-30 2014-08-31		



UNIVERSITY of	Certification								
				Home	My Profile	Tutorial	Help▼	About	Log Off
CERT			Line Item Eligi	bility					
Assignment		Falaataa	Check All	Cub	Clear All				
Notification		Selection	HOXXX	DC -	Training Department	nt			
Pre Review			Back Pro	ceed					
Certify					_				
Post Review									
Reporting									

B. The report displays all individuals that have an effort form for the reporting period including their line item eligibility criteria.

USTON	Certification	5 5 5						
			Home My P	rofile Tutorial He	elp A bout Log			
ERT			Reporting					
		Lin	e Item Eligibility Rep	ort (053115)				
Assignment Notification	Employee ID 💠	Employee Name 💠	Title \$	Eligibility For Line Item Certification?	Line Item Certification ÷ Enabled?			
Pre Review								
Cartific	44444001	Karen Davis B	1010	N	N			
Cerury	555555001	Michael, Ford	1020	N	N			
Post Review	666666001	Karen Davis A	1010	N	N			
	888888001	Jennifer Evans	T3D7	Y	Y			
	Displaying 4 of 4 records							