

## Step-by-Step Guide *ePER Summary by PI Report*

### What is the ePER Summary by PI report?

The ePER Summary by PI report is issued to every Principal Investigator (PI). It focuses on a particular semester, and shows the projects for which the PI is responsible. The report lists all individuals who must certify effort on the respective projects and indicates whether or not the effort has been certified.

### Why should you review this report?

A PI should review this report to see who has finished certifying her or his effort and who has yet to complete this important task.

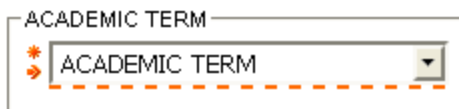
### How do you run this report?

First, log in to your campus portal:

Boulder – <https://portal.cusys.edu/MyCUInfoFedAuthLogin.html>  
Colorado Springs – <https://portal.cusys.edu/MyUCCSFedAuthLogin.html>  
Denver – <https://portal.cusys.edu/UCDAccessFedAuthLogin.html>  
System Administration – <https://portal.prod.cu.edu/SYSFedAuthLogin.html>

Select the **CU Resources** tab. Then select **Reporting**.  
Click on **Public Folders** → **ePERs** → **ePERs Summary by PI**.

Select the **Academic Term** for which you are reviewing from the drop down menu.



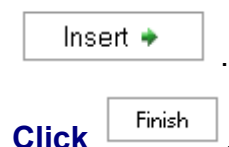
A screenshot of a web form element. At the top, the text 'ACADEMIC TERM' is followed by a horizontal line. Below this is a dropdown menu box with a small downward arrow on the right side. The text 'ACADEMIC TERM' is displayed inside the box. To the left of the box, there are two small orange arrows pointing right.

Enter your last name, or the name of the PI for the projects you are reviewing, in the keywords field and click search.



A screenshot of a search form. At the top, the text 'PRINCIPAL INVESTIGATOR' is followed by a horizontal line. Below this is the label 'Keywords:' in blue. Underneath is the instruction 'Type one or more keywords separated by spaces.' in blue. There is a text input field containing the text 'smith'. To the right of the input field is a 'Search' button with a magnifying glass icon.

Select the correct name from the list of names that are returned, and **click**



Two buttons are shown. The first is a rectangular button with the text 'Insert' and a small green arrow pointing right. Below it, the word 'Click' is written in blue. To the right of 'Click' is another rectangular button with the text 'Finish'.

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### How to read your report: understanding data elements

Each ePER Summary by PI report should have the same elements as the report below:

University of Colorado Reporting System		Personnel Effort Reporting System ePER Summary By PI Semester: 6 - FALL Fiscal Year: 2007							Pag Rur Rur
EMPL ID	EMPL NAME	POSITION NUM	SPD KEY CODE	AMOUNT	PAY PCNT	CS PCNT	PAY W/CS PCNT	CERT PCNT	
<b>PRINCIPAL INVESTIGATOR: BOWMAN,CHRISTOPHER</b>									
PROJECT: 1532704 NOVEL MONOMER DEVELO SPONSOR: UIOWA									
169137	Lee,Tai Yeon	00644840	13040554	106.77	1	0	1	1	
<b>TOTAL FOR PROJECT: 1532704</b>				<b>106.77</b>					
PROJECT: 1536138 FERROELECTRIC LIQUID SPONSOR: NSF									
107503	Bowman,Christopher	00159071	13053454	0.00	0	13	13	0	
160903	Khire,Vaibhav Suresh	00614018	13053454	7,816.68	100	0	100	0	
<b>TOTAL FOR PROJECT: 1536138</b>				<b>7,816.68</b>					
PROJECT: 1540493 STRUCUTRE-REACTIVITY- SPONSOR: CSS									
127097	Cramer,Neil B	00667117	13059279	4,548.13	35	0	35	61	
<b>TOTAL FOR PROJECT: 1540493</b>				<b>4,548.13</b>					
PROJECT: 1541027 GRADUATE PROGRAM IN SPONSOR: ED									
157560	Lampe,Kyle J	00632353	13062465	1,954.17	100	0	100	100	
<b>TOTAL FOR PROJECT: 1541027</b>				<b>1,954.17</b>					
PROJECT: 1541918 DEVELOPMENT OF NOVEL SPONSOR: CONFI									
127097	Cramer,Neil B	00667117	13066338	8,280.01	65	0	65	39	
169137	Lee,Tai Yeon	00644840	13066338	13,138.17	99	0	99	99	
<b>TOTAL FOR PROJECT: 1541918</b>				<b>21,418.18</b>					
PROJECT: 1542584 NOVEL CROSSLINK POLY SPONSOR: NIDCR									
152288	Kilambi,Harini	00640007	13071195	4,687.50	57	0	57	57	
152288	Kilambi,Harini	00669848	13071195	3,606.00	43	0	43	43	
180164	Kloxin,Christopher J	00648951	13071195	12,640.64	100	0	100	0	
171404	McKittrick,Michael W	00601408	13071195	1,515.00	100	0	100	0	
143153	Reddy,Sirish K	00645340	13071195	1,617.19	50	0	50	0	
162470	Scott,Timothy .F	00600354	13071195	13,294.65	100	0	100	0	
176932	Yang,Jing	00648125	13071195	7,843.75	75	0	75	75	
<b>TOTAL FOR PROJECT: 1542584</b>				<b>45,204.73</b>					
PROJECT: 1542784 REDOX-INITIATED RADI SPONSOR: UCTTO									
176932	Yang,Jing	00648125	13072524	1,250.00	12	0	12	12	
<b>TOTAL FOR PROJECT: 1542784</b>				<b>1,250.00</b>					

#### Elements of the report:

- Report Header** – provides information about the report, including the University of Colorado logo, report title, etc. Pay particular note to the Semester and the Fiscal Year. The report in the example above is for the Fall Semester 2006. (Fall Semester 2006 is within Fiscal Year 2007.).
- Empl ID** – lists the Employee ID for each individual needing to certify effort.
- Empl Name** – lists the name of each individual needing to certify effort.
- Position Num** – indicates the position number of each individual needing to certify effort.

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5. **Spd Key Code** – shows the SpeedType to which the effort was charged
6. **Amount** – indicates the dollar amount being charged to the SpeedType in accordance with the effort being performed.
7. **Pay Pcnt** – indicates the percentage of the individual’s total effort being charged to the respective SpeedType.
8. **CS Pcnt** – indicates the cost share amount.
9. **Pay w/CS Pcnt** - shows the combined effort percentage of both the pay and the cost share components for the SpeedType indicated.
10. **Cert Pcnt** – indicates what percentage of the effort has been certified. (The number in column 10 should equal the number in column 9. If this is not the case, then the effort has not yet been certified correctly.)
11. **Project** – shows the project number, the project name, and the project sponsor.
12. **Line Showing Cost Share Pcnt**– indicates that this employee has only cost share effort on Project 1536138. The “0” value in Column 10, “Cert Pcnt,” indicates that the cost share effort has not been certified.
13. **Line Showing Pay Pcnt**– indicates that this employee has only paid effort on Project 1536138. The “0” value in Column 10, “Cert Pcnt,” indicates that the paid effort has not been certified.

### **How to read your report: identifying and handling potential issues**

Review the report paying particular attention to the numbers in Column 9 and Column 10. If these numbers differ, it means that effort has not been certified properly and the Principal Investigator must assure that appropriate and timely corrective action is taken.