

## 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.

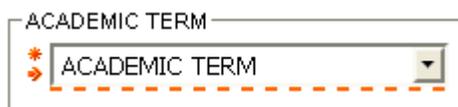
### Why should you review this report?

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?

To begin the process, log in to your campus portal. On the **CU Resources** tab, select **Quick Links, CU-Data, ePERs, ePERs Summary by PI**.

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



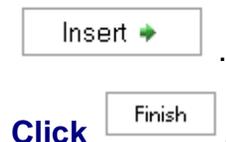
A screenshot of a web form element. At the top, the text "ACADEMIC TERM" is followed by a horizontal line. Below this is a dropdown menu box. The box contains the text "ACADEMIC TERM" and a small downward-pointing arrow on the right side. To the left of the text "ACADEMIC TERM" are two small red asterisk icons. A dashed orange line is drawn around the bottom and right sides of the dropdown menu box.

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 a smaller blue instruction: "Type one or more keywords separated by spaces." Below the instruction 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**



A screenshot showing two buttons. The top button is labeled "Insert" and has a small green arrow pointing to the right. Below it is a period ".". The bottom button is labeled "Finish" and is preceded by the word "Click" in blue.

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

### 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                                      |                      | Personnel Effort Reporting System<br>ePERS Summary By PI |              |                  |          |         |               |           | Page |
|---|----------------------|--|--------------|------------------|----------|---------|---------------|-----------|------|
| Reporting System  |                      | Semester: 6 - FALL Fiscal Year: 2007                     |              |                  |          |         |               |           | Run  |
| 2   | 3                    | 4  | 5            | 6                | 7        | 8       | 9             | 10        |      |
| 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>    |          |         |               |           |      |
| <b>PROJECT: 1536138 FERROELECTRIC LIQUID SPONSOR: NSF</b>   |                      |  |              |                  |          |         |               |           |      |
| 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>  |          |         |               |           |      |
| <b>PROJECT: 1540493 STRUCUTRE-REACTIVITY- SPONSOR: CSS</b>  |                      |  |              |                  |          |         |               |           |      |
| 127097  | Cramer,Neil B        | 00667117   | 13059279     | 4,548.13         | 35       | 0       | 35            | 61        |      |
| <b>TOTAL FOR PROJECT: 1540493</b>                           |                      |  |              | <b>4,548.13</b>  |          |         |               |           |      |
| <b>PROJECT: 1541027 GRADUATE PROGRAM IN SPONSOR: ED</b>     |                      |  |              |                  |          |         |               |           |      |
| 157560  | Lampe,Kyle J         | 00632353   | 13062465     | 1,954.17         | 100      | 0       | 100           | 100       |      |
| <b>TOTAL FOR PROJECT: 1541027</b>                           |                      |  |              | <b>1,954.17</b>  |          |         |               |           |      |
| <b>PROJECT: 1541918 DEVELOPMENT OF NOVEL SPONSOR: CONF1</b> |                      |  |              |                  |          |         |               |           |      |
| 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> |          |         |               |           |      |
| <b>PROJECT: 1542584 NOVEL CROSSLINK POLY SPONSOR: NIDCR</b> |                      |  |              |                  |          |         |               |           |      |
| 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> |          |         |               |           |      |
| <b>PROJECT: 1542784 REDOX-INITIATED RADI SPONSOR: UCTTO</b> |                      |  |              |                  |          |         |               |           |      |
| 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.
- Spd Key Code** – shows the SpeedType to which the effort was charged

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

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.