# HOW TO CERTIFY EFFORT REPORTING SYSTEM (ERS)

Revised July 15, 2019

- 1. Go to UCLA ERS http://efm.research.ucla.edu/ers-system-access/
- 2. Sign in using your UCLA Login ID or Mednet Username/Password.
  - If you do not have one, go to <u>https://logon.ucla.edu</u> or click here to establish one.



- 3. Choose "Show Status: ALL-Open".
  - Make sure "Reporting Periods: All" & "Display Saved Search: My Projects" are selected.

Effort Reporting System		User:			Sign-Out
REPORT LIST MANAGE SEARCHES	SEARCH REPORTS			Export List	Send List Print List ?
Display Saved Search: My Projects				5//	
Show Status: ALL-Open	]	Reporting	Periods: 💿 📶	C Select: Spring 09:	Merced Semester
Display 100 ALL-Open	i			lt 💠 disp	laying 0 to 0 (0 total) 🔿 🗣 🛙
Period  ALL-Overdue ALL-Adjustment Required	For	Department	<u>Last Mod fied</u>	<u>Status</u>	Under Prelim Review
- ALL-Reissued ALL-Partially Certified	-	-	-	I¢ ¢ disp	laying 0 to 0 (0 total) 🜩 ቀ 🛙
Certified Copyright 201 Open-Reopened Partially Certified	e University of California. All right	s reserved.			R9.3 B006
Required Not Required Adjustment Required					
Exception Certified/AdjustReqd Open-Reissued Reissued-Partially Certified					

EFFORT REPORT LIST 🗸		Export List Send	List Print List	?			
Display Saved Search: My Projects							
Show Status: ALL-Open	Reporting Periods: 💿 All 🔿 Sela	ect: Fall 07: Merced 9	Semester				
Display 100 🔽 reports per page 🛛 🕹 🗣							
Period	▼ <u>For</u>	Department	Last Modified	Status			
Spring 07: 11/12 Academics		MEDICINE- CARDIOLOGY	11/15/2007 v1.0	Open/Overdue			
Summer 07: REG 11/12 Academics		MEDICINE- CARDIOLOGY	01/26/2008 v1.2	Exception/Overdue			
Summer 06: Reg-Qtr Non-Acad		MEDICINE- CARDIOLOGY	01/25/2008 v2.3	Partially Certified/Overdue			

### 4. Click on period/name of personnel you wish to certify. The below screen will pull up.

- To obtain more grant information, place cursor over account number/name.
- "Report Options" if "Report requires multiple certifications" is pre-checked, it means that staff person is paid from multiple PIs' Sponsored Projects, <u>only certify the projects</u> that you have first hand knowledge by checking the box next to those projects.

REPORT LIST MANAGE SEARCHES SEA	RCH REPORTS	5		View	Payroll Deta	ails Export Send	Print ?		
Image: Spring 11: REG 11/12 ACADEMICS         Image: Berp. ID:         Image: Home Dept: MEDICINE-NANO MEDICINE									
Edit Report View/History Comment Log									
Version: 1.2 (01/05/2012 12:00)   Status: Partially Certified Service Period: March 28, 2011 to June 10, 2011 Pay Periods: April 1, 2011 to June 30, 2011									
Federal and Federal Flow-Through Sponsored Projects	Payroll % [A]	Paid Effort % to Certify [B]	N/A to UCLA [C]	Cost Share Effort % to Certify [D]	Total % [A+C]	Total Effort % to Certify [B+D]	Line Certified		
4-441353-AN∹ FDP-NIH CA133697 12/11 54%	60% 💽	60 %		0 %	60%	60%			
4-441353-AN-: FDP-NIH ES016746 2/12 54%	40% 💽	40%		0%	40%	40%			
Total Eederal and Eederal Flow Through	PI: Grant Title: RNet ID: Sponsor Aw	ard #:							
Sponsored Projects requiring certification	100%	100%		0%	100%	100%			
Other Sponsored Projects	0% 🔍	0%		+ 0 %	0%	0%			
Non-Sponsored Activities	0% 🕙	0 %		- 0 %	0%	0%			
Total Other Effort not requiring certification	0%	0%		0%	0%	0%			
Grand Total	100%	100%		0%	100%	100%			
					UPDA	TE CALCULATION			
Report options:	☑ Report □ Report	requires multiple allows for Cost S	e certifications. Sharing Offset A <u>c</u>	gainst Other Sponsore	ed Projects				

- 5. Click on "Comment Log" tab to ensure the appropriate administrative person has reviewed & verified the ERS for correctness.
  - If you have any questions/concerns, contact your administrative contact person before moving to step 6.

REPORT LIST MANAGE SEARCHES SEARCH REPORTS	View Payroll Details Export Send Print ?
WINTER 09: REG NON-ACADEMICS Emp. ID:   Home Dept: MEDICINE-NANO MEDICINE	O \$\Display Report 6 of 7 \$\Display 0
Edit Report View/History Comment Log	
Version: 1.2 (07/17/2009 01:09)   Status: Open (Overdue) Service Period: January 1, 2009 to March 31, 2009 Pay Periods: January 1, 2009 to March 31, 2009	
Comment for Version 1.2 07/17/09 1:09 PM by ROWELL RAMOS 🖂	
Reviewed and verify by Rowell Ramos on 07/17/09	

- 6. Click "Certify Effort Report" if <u>all</u> % efforts are correct. Click "Save" if ERS requires multiple certifications\*.
  - <u>PLEASE ONLY CERTIFY THOSE PERSONNEL YOU HAVE FIRST HAND</u> <u>KNOWLEDGE OF THE ACTIVITY REFLECTED ON THE REPORT.</u>
  - All Faculty/Academic personnel must self certify.
  - \*If staff member require multiple certifications, and you only have first hand knowledge of a couple, make sure only those projects are checked.

FDP-NIH ES013432 7/8 54%		└ <u></u> `~		~			-	
4-441357-RD- FDP-NIH HL028481 01/08 54.50%	<u>20%</u> 🔇	20%		0%	20%	20%	~	
		Lin	e will be certified v	when you click 'Sa	ve'			
			A	DD ADDITIONAL SP	ONSORED	PROJECT		
Total Sponsored Projects requiring certification	100%	100% 100% 100% 100%						
Other Sponsored Projects	<u>0%</u> Q	0 %		+ 0 %	0%	0%		
Non-Sponsored Activities	<u>0%</u>	0 %		- 0 %	0%	0%		
Total Other Effort not requiring certification	0%	0%		0%	0%	0%		
Grand Total	100%	100%		0%	100%	100%		
		UPDATE CALCULATION						
Report options:	Report options: Report requires multiple certifications.							
Add a comment:	Comments can be up to 255 characters long. (Total characters: 0)							
VIEW PAYROLL DETAILS REVERT SAVE CERTIFY EFFORT REPORT								

7. You will receive a confirmation screen like below. Read statement and click "Confirm." It will automatically bring up the screen for the next person/period on your list of ERS.



8. To skip to the next person you are *authorized* to verify, either click the ⇒ to advance one person/period at a time or click "Report List" to go back to the Main Menu to select next person/period you wish to certify.

REPORT LIST MANAGE SEARCHES SEARCH REPORTS	View Payroll Details Export Send Print ?
SPRING 09: REG 11/12 ACADEMICS	[ (수 수 Report 5 of 42 수 수)]
Emp. ID:   nome Dept: MEDICINE-CARDIOLOGY	<b>▲</b>
Edit Report View/History Comment Log	
Version: 2.1 (02/15/2010 09:18)   Status: Open-Reissued (Overdue) Service Period: March 30, 2009 to June 12, 2009 Pay Periods: April 1, 2009 to June 30, 2009	

NOTES and HINTS & TIPS: (see screen shot on next page)

1. Do NOT certify any yellow highlighted personnel in your list of "My Projects", unless it is your own effort report. Faculty/Academics are all highlighted yellow and must SELF certify.

REPORT LIST	MANAGE SEARCHES SEARCH REPORTS	View Payroll Details Export Send Print ?
	SPRING 06: 11/12 ACADEMICS	미수 수 Report 7 of 23 수 수미
Emp. ID:	Home Dept: MEDICINE-CENTER FOR HUMAN NUTR	>>PI<<
Edit Report	View/History Comment Log	
Version: 3.1 (06 Service Period: Pay Periods: Ap	/11/2009 09:02)   <b>Status: Open-Reissued (Overdue)</b> March 29, 2006 to June 16, 2006 ril 1, 2006 to June 30, 2006	

2. Do NOT certify if you see a pink "Report Under Preliminary Review" box in the upper right hand corner and a check mark in the Report options: Report is under preliminary review. Your fund manager is still working on this ERS report. Skip to the next applicable ERS report.

Edit Report View/History Comment Log		Report Under Preliminary Review
Version: 2.1 (09/12/2008 02:08)   Status: Exception (O Service Period: July 1, 2007 to September 30, 2007 Pay Periods: July 1, 2007 to September 30, 2007	verdue)	

In the below example, the individual was paid 52% of her salary (Adjusted Payroll % column) from the one Federal contract or grant. She gave 3% in-kind effort *without* salary (Adjusted Cost Share % column). Therefore her total effort off the Federal contract or grant is 55% (Adjusted Total % column).

# For Senior/Key Personnel

# NIH Budgeted % = Total Effort % to Certify (F) > Paid Effort % to Certify (B)

Image: Spring 11: REG 11/12 Academics         Emp. ID:       Image: Home Dept: MEDICINE-DEPT ADMINISTRATION         Image: Spring 11: REG 11/12 Academics         Image: Spring 11: REG 11/12 Academics							
Edit Report View/History Comment Log 2 Report Under Preliminary Rev							er Preliminary Review
Version: 1.0 (12/02/2011 06:16)   Status: Open Service Period: March 28, 2011 to June 10, 2011 Pay Periods: April 1, 2011 to June 30, 2011	Open 0, 2011 1 <u>A B</u> C <u>D</u> (A+C)					F (B+D)	
Federal and Federal Flow-Through Sponsored Projects	Payroll % [A]	Paid Effort % to Certify [B]	N/A to UCLA [C]		Cost Share Effort % to Certify [D]	Total % [A+C]	Total Effort % to Certify [B+D]
4-441357 FDP-NIH HL030568 3/12 54%	14% 💽	14 %			16 %	14%	30%
					ADD AD	DITIONAL SF	ONSORED PROJECT
Total Federal and Federal Flow-Through Sponsored Projects requiring certification	14%	14%			16%	14%	30%
Other Sponsored Projects	0% 🕲	0 %			+ 0 %	0%	0%
Non-Sponsored Activities	86% 🔍	86 %			- 16 %	86%	70%
Total Other Effort not requiring certification	86%	86%			-16%	86%	70%
Grand Total	100%	100%			0%	100%	100%
						UPD	ATE CALCULATION
Report options:	Report options:          Report requires multiple certifications.          Report allows for Cost Sharing Offset Against Other Sponsored Projects.         Report is under preliminary review						
Add a comment:							
	Comments ca	an be up to 255 cha	aracters long. (T	'otal o	characters: 0)		
VIEW PAYROLL DETAILS REVERT SAVE CERTIFY EFFORT REPORT							

#### A - Payroll % [A]

Reflects actual % **PAID**. Percent of effort calculated from Payroll ledgers.

#### B - Paid Effort % to Certify [B]

Reflects changes to the Original Payroll % due to retro transfers of salary to adjust % PAID.

#### C - N/A to UCLA [C]

% of Committed Cost Sharing as imported from cost sharing systems. Not applicable to UCLA.

#### D - Cost Share Effort % to Certify [D]

Reflects EFFORT without salary, a.k.a. in-kind effort.

## E - Total % [A+C]

Total of Original Payroll % & Original Cost Sharing %.

#### F – Total Effort % to Certify [B+D]

Total of Adjusted Payroll % & Adjusted Cost Sharing %. Reflects total amount of **EFFORT**, whether or not salary was paid for then entire % effort.

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