

# EFFORT REPORTING SYSTEM (ERS)

Revised January 6, 2012

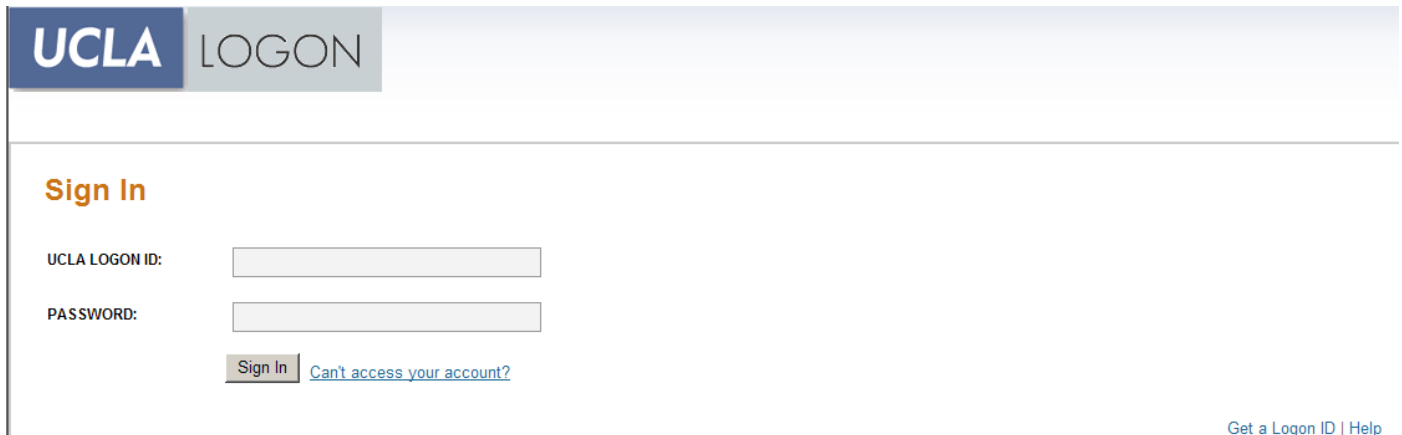
<http://www.efm.ucla.edu/EffortRpt.htm>

## ITEMS NEEDED:

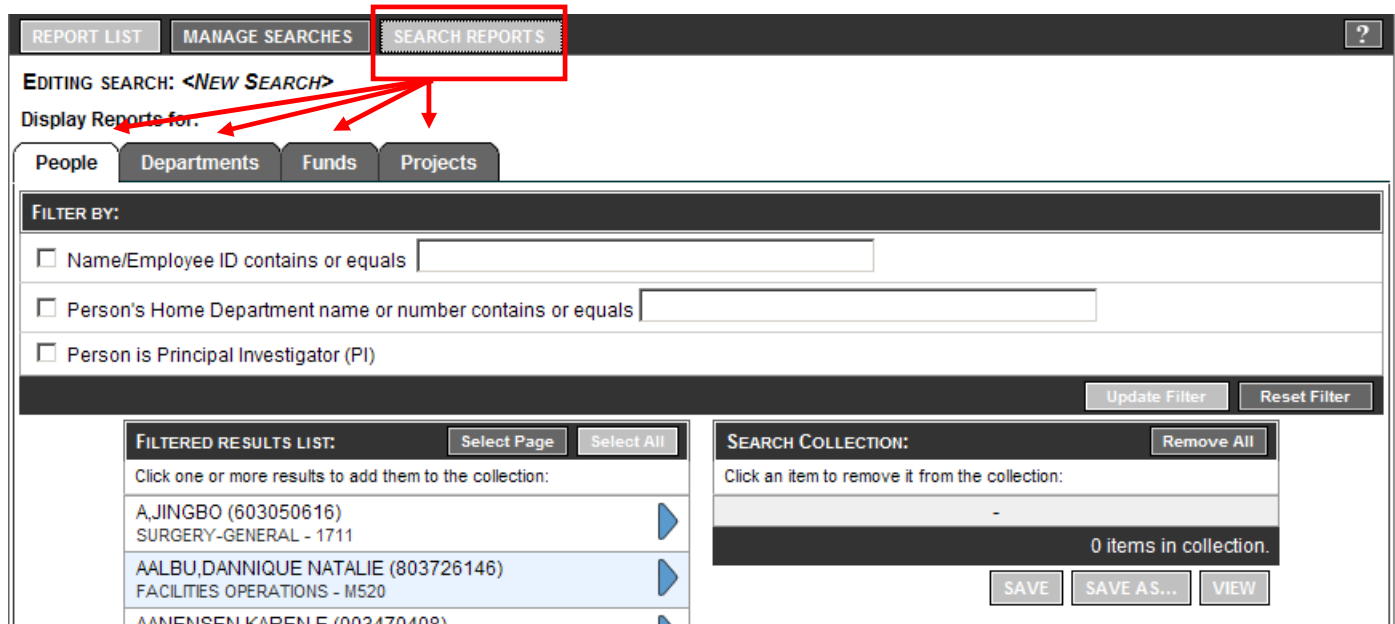
ERS, Excel QDB (PAR Detail Report), current/approved Budgets for all grants

## TO PULL UP ERS DATA:

1. Login with UCLA Logon ID <https://auth.ucla.edu/index.php>

The image shows the UCLA Logon page. At the top, there is a header with "UCLA" in a blue box and "LOGON" in a grey box. Below this, the "Sign In" section is highlighted in orange. It contains two input fields: "UCLA LOGON ID:" and "PASSWORD:". Below the password field is a "Sign In" button and a link "Can't access your account?". At the bottom right, there are links for "Get a Logon ID" and "Help".

2. Search Effort Reports by People, Departments, Funds or Projects

The image shows the "SEARCH REPORTS" interface. At the top, there are three tabs: "REPORT LIST", "MANAGE SEARCHES", and "SEARCH REPORTS" (which is highlighted with a red box). Below the tabs, it says "EDITING SEARCH: <NEW SEARCH>". There are four buttons: "People", "Departments", "Funds", and "Projects". Below these is a "FILTER BY:" section with three checkboxes: "Name/Employee ID contains or equals", "Person's Home Department name or number contains or equals", and "Person is Principal Investigator (PI)". To the right of these are "Update Filter" and "Reset Filter" buttons. Below the filter section is a "FILTERED RESULTS LIST:" with a "Select Page" and "Select All" button. It contains a list of results with blue arrows pointing to the right. To the right of the results list is a "SEARCH COLLECTION:" section with a "Remove All" button. It contains a list of items with a "0 items in collection." message. At the bottom right are "SAVE", "SAVE AS...", and "VIEW" buttons.

3. Update Filter
4. Click on blue arrow under "Filtered Results List" to move desired selections to the right – "Search Collection"

REPORT LIST | MANAGE SEARCHES | SEARCH REPORTS

EDITING SEARCH: <NEW SEARCH>

Display Reports for:

People | Departments | Funds | Projects

FILTER BY:

Choose department type: Account Department

☒ Department name or number contains or equals 1574

☐ Multiple Department/Org numbers equal

Hint: Use commas, tabs, carriage returns or line feeds as delimiters. For Home Department only, spaces may also be used.

Update Filter | Reset Filter

FILTERED RESULTS LIST: | Select Page | Select All

Click one or more results to add them to the collection:

MEDICINE-NANO MEDICINE 1574

20 per page | 1 to 1 (1 total)

MANAGE SAVED SEARCHES

SEARCH COLLECTION: | Remove All

Click an item to remove it from the collection:

MEDICINE-NANO MEDICINE 1574

1 items in collection.

SAVE | SAVE AS... | VIEW

## 5. "Save as" saved search

REPORT LIST | MANAGE SEARCHES | SEARCH REPORTS

EDITING SEARCH: <NEW SEARCH>

Display Reports for:

People | Departments | Funds | Projects

FILTER BY:

Choose department type:

☒ Department name or number contains or equals 1574

☐ Multiple Department/Org numbers equal

Hint: Use commas, tabs, carriage returns or line feeds as delimiters. For Home Department only, spaces may also be used.

Update Filter | Reset Filter

FILTERED RESULTS LIST: | Select Page | Select All

Click one or more results to add them to the collection:

MEDICINE-NANO MEDICINE 1574

per page | 1 to 1 (1 total)

MANAGE SAVED SEARCHES

SEARCH COLLECTION: | Remove All

Click an item to remove it from the collection:

MEDICINE-NANO MEDICINE 1574

1 items in collection.

SAVE | SAVE AS... | VIEW

SAVE SEARCH

Please enter a name for your search:

Nanc

☐ Display report list after saving.

SAVE | CANCEL

6. To pull the ERS report list for a specific faculty member/PI go to "Managed Saved Searches" and click "Subscribe". This will enable you to see the set of ERS the PI sees.

7. Search for PI via name or University ID #

8. Update Filter

9. Click “Subscribe” to subscribe to PI’s ERS list. It will be saved to your saved searches as “My Projects (PI’s Name)”

Name	Default	Created by	Last Modified
Ad-hoc query			03/01/2010
My Effort Reports	<input type="radio"/>	CATHERINE RUJANURUKS	11/01/2006
My Projects DEMER,LINDA L	<input type="radio"/>	LINDA DEMER	10/04/2006
Nano	<input checked="" type="radio"/>	CATHERINE RUJANURUKS	01/15/2008

ERS Start-up Options

When entering ERS, display my default search as defined above.	<input type="radio"/>
When entering ERS, display the Edit Search page.	<input checked="" type="radio"/>
When entering ERS, display the Manage Saved Searches page.	<input type="radio"/>
When entering ERS, display the search results from my last session.	<input type="radio"/>

SUBSCRIBE CREATE NEW SEARCH

ERS :: SUBSCRIBE TO PI My PROJECTS SEARCH

☒ Principal Investigator's Name/Employee ID contains or equals: Demer

☐ Principal Investigator's Home Department name or code contains or equals:

Update Filter Reset Filter

PI Name	Home Department	Home Department Code
DEMER,JOSEPH L (101197793)	OPHTHALMOLOGY	1610
DEMER,LINDA L (900850911)	MEDICINE-DEPT ADMINISTRATION	1565

Display 20 people per page

displaying 1 to 2 (2)

10. Click on saved search to open
- Ensure “Show Status” is on appropriate option – i.e. ALL, ALL-Open, ALL-Certified, etc.
  - Ensure “All” is selected for “Reporting Periods”

11. Click “For” to sort ERS in alphabetical order by employee’s last name

REPORT LIST MANAGE SEARCHES SEARCH REPORTS

Display Saved Search: Nano

Show Status: ALL-Open

Reporting Periods: All Select: Fall 09: Merced Semester

displaying 1 to 3 (3 total)

Employee	Department	Last Modified	Status	Under Prelim Review
	MEDICINE-DEPT ADMINISTRATION	07/18/2008 v3.0	Certified/AdjustReqd	
	SCHOOL OF NURSING	06/19/2008 v4.0	Certified/AdjustReqd	
	SCHOOL OF NURSING	06/19/2008 v2.0	Certified/AdjustReqd	

Display 100 reports per page

displaying 1 to 3 (3 total)

12. Click on the name/period you wish to review/edit/verify.

### **STATUS LIST & DEFINITIONS:**

**Open** – ERS is open and ready for review and certification.

**Certified** – ERS has been certified.

**Partially certified** – Multiple certifications are required; all projects have not been certified.

**Certified/AdjustReqd** – Payroll % was changed on ERS. ERS was certified but no transfer of expense was processed.

**Reissued** – ERS reissued by system due to late arriving transactions.

**Reopened** – Previously certified ERS has been reopened and has not yet been recertified.

**Not Required** – ERS issued because the employee was a principal investigator or because of a special request.

**Exception** – Indicated anomalous condition such as an invalid FAU.

**Open, Partially Certified, Reissued, and Reopened** status will be augmented with “overdue” when appropriate.

### **EDITING CERTIFIED ERS**

ERS Coordinators cannot reopen a previously certified report. Contact Raellen Man @ [rman@mednet.ucla.edu](mailto:rman@mednet.ucla.edu) / x58112 to reopen a report. You must provide Raellen with an appropriate and detailed justification.

### **VOCABULARY:**

**Federal and Federal Flow-Through Sponsored Projects** = Federal Contracts & Grants

**Other Sponsored Projects** = Private, Foundation, Industry, Workstudy, Gifts, For-Profit Contracts

**Non-Sponsored Activities** = Unrestricted, i.e. 19900 or 62165

REPORT LIST		MANAGE SEARCHES		SEARCH REPORTS		View Payroll Details		Export		Send		Print		?	
WOOTEN,WILLIAM NOAH   SPRING 11: REG NON-ACADEMICS														Report 11 of 22	
Emp. ID:803596932   Home Dept: MEDICINE-NANO MEDICINE															
Edit Report		View/History		Comment Log											
Version: 1.0 (12/02/2011 09:11)   Status: Open															
Service Period: April 1, 2011 to June 30, 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]								
4-441353-N4-30910 FDP-NIH ES019528 NEL 04/11 54%		100%	100%		0%	100%	100%								
								ADD ADDITIONAL SPONSORED PROJECT							
Total Federal and Federal Flow-Through 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%								
								UPDATE CALCULATION							
Report options:		<input type="checkbox"/> Report requires multiple certifications. <input type="checkbox"/> Report allows for Cost Sharing Offset Against Other Sponsored Projects. <input type="checkbox"/> Report is under preliminary review													

### **TO VERIFY:**

1. Pull QDB ERS Detail reports by quarter for each employee



- See [ERS Calculations chapter](#) in the DOM Fund Manager's Manual for detailed instructions on running the report.

Med Sch QDB Adhoc - Version Date: 12/14/2011

## QDB/FPM Custom Reports - Main Menu

<b>General Ledger Custom Reports</b> Most Recent 201111	<b>Payroll Expense Distribution</b> Most Recent 201112
<ul style="list-style-type: none"> <li>Summary of Funds</li> <li>Summary - By Sub</li> <li>Non-Salary Expense Projection by Month (all fund types)</li> <li>Expense by Month</li> <li>Summary - By Sub Object</li> <li>Sales &amp; Service Summary</li> <li>Detail - Closed</li> <li>Detail - Open</li> <li>Detail - All</li> <li>Salary Cap Flag</li> <li>Billing &amp; Accounts Receivable</li> <li>Link to Financial Web Report (OFSR)</li> <li>----- CLOSING REPORTS</li> <li>Pre-Closeout Checklist (Recommended 2 months prior to fund end date)</li> <li>Smart Closeout Tool</li> <li>Financial Reports Due</li> <li>Expenses - After End Date</li> <li>Expenses - Unallowable and Warning Object Codes</li> <li>Summary - By Sub</li> <li>Detail to Appear</li> <li>Remaining Encumbrances</li> <li>F&amp;A Reconciliation Link</li> <li>Training Grant -Trainee Expense Worksheet</li> <li>Subawards/Subcontracts/Subgrants</li> <li>1198XX (Inter-campus/Carryforward/STIP)</li> <li>Detail - After Closeout</li> </ul>	<ul style="list-style-type: none"> <li>Salary by Month</li> <li>Salary &amp; Percentage by Month</li> <li>Reconciliation</li> <li>FAU Sum</li> <li>Employee Sum</li> <li>Ledger Yr/Mo</li> <li>Earned Yr/Mo</li> <li>Brown UPAY</li> <li>Other UPAYs</li> <li>PAR</li> <li>Admin Salary</li> <li><b>ERS Detail report (11/12 Academics and Non Academics)</b></li> <li>ERS Detail report (9/12 Academics)</li> <li>ARRA Linked Accounts by Hierarchy Code</li> <li>ARRA FTE Report</li> <li>----- CLOSING REPORTS</li> <li>Training Grant - Postdoc Allowable/Unallowable Benefits</li> <li>Training Grant Benefits</li> <li>Payroll After Fund End Date</li> </ul>

Report ppp for: ☐ Organizational ☒ Employee

2. Compare % for
  - a. ERS system calculation paid effort (Payroll % [A] column)
  - b. QDB/Actual paid effort
  - c. Budget – for key personnel. Non-key is not as vital to match the budget

**ERS Total Effort % to Certify [B+D] = Budget Effort % = Actual Effort on Project.**  
**All should be >= QDB/Paid %**

i.e. Paid % should NOT be greater than budget/ERS %.

3. If all 3 are acceptable, click “Edit Report” tab

<b>Edit Report</b>	View/History	Comment Log	
Version: 2.1 (09/12/2008 02:08)   Status: <span style="color: red;">Exception (Overdue)</span> Service Period: July 1, 2007 to September 30, 2007 Pay Periods: July 1, 2007 to September 30, 2007			

4. Add a comment “Report reviewed and verified by (your name) on (date).”
5. Save

The screenshot shows a web interface for adding a comment. A red box with the number '4' points to the 'Add a comment:' label. Another red box with the number '5' points to the text input area. The input area contains the text 'Report reviewed & verified by Cathy on 03/08/10.'. Below the input area, a status bar indicates 'Comments can be up to 255 characters long. (Total characters: 48)'. At the bottom of the form are four buttons: 'VIEW PAYROLL DETAILS', 'REVERT', 'SAVE', and 'CERTIFY EFFORT REPORT'.

6. Have appropriate supervisor/Faculty member certify

### **TO MAKE ADJUSTMENTS:**

1. Click "Edit Report" tab
2. Type adjusted % in "Paid Effort % to Certify [B]" and/or "Cost Share Effort % to Certify [D]" column, depending on the situation, to reflect actual/correct % under Total Effort % to Certify [B+D]
  - Paid Effort % to Certify [B] = Effort will be EQUAL to the amount of salary paid. Payroll Adjustments (UPAYs) may be necessary if not already processed
  - Cost Share Effort % to Certify [D] = Effort will be GREATER than the amount of salary paid. The cost shared salary was paid on Non-Sponsored Projects (unrestricted funds)
  - **Do NOT change the Paid Effort % to Certify [B] unless you have done/will do a UPAY.**
3. If a project that should be listed isn't, click "Add Additional Sponsored Project"
  - a. Enter fund number of project – Filter
  - b. Select
4. Cost Share Effort % to Certify [D] - If necessary, decrease % under Non-Sponsored Activities by the amount added into Total Sponsored Projects. Cost sharing debit can only be charged to a Non-Sponsored Activity.
5. Update Calculation
6. Add a Comment – "Report reviewed, *adjusted* and verified by (your name) on (date)." Add additional justification to explain adjustment, as necessary.
7. Save
8. Have appropriate supervisor/Faculty member certify

\*\*\* Grand Total percentages should ALWAYS equal 100% but can never exceed 100%.\*\*\*

If Payroll % amount is a negative #, it may indicate that UPAYs for the same transaction were processed more than once in error.

If either Payroll % is anything other than 100%, this is an ERS system glitch. An [ERS reconciliation spreadsheet](#) must be processed after the report has been certified by the PI/staff member.

REPORT LIST | MANAGE SEARCHES | SEARCH REPORTS | View Payroll Details | Export | Send | Print | ?

Emp. ID: **1** | SPRING 11: REG 11/12 ACADEMICS | Home Dept: MEDICINE-DEPT ADMINISTRATION | >>PI<< | Report 15 of 206

Edit Report | View/History | Comment Log **2**

Version: 1.0 (12/02/2011 05:36) | Status: Open  
 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]
4-441357-KI-FDP-NIH HL030568 3/12 54%	33%	40%		0%	33%	40%
4-441357-KI-FDP-NIH HL081397 2/12 54%	27%	27%		3%	27%	30%
<b>3</b> ADD ADDITIONAL SPONSORED PROJECT						
<b>Total Federal and Federal Flow-Through Sponsored Projects requiring certification</b>	<b>60%</b>	<b>67%</b>	<b>4</b>	<b>3%</b>	<b>60%</b>	<b>70%</b>
<b>Other Sponsored Projects</b>	0%	0%		+ 0%	0%	0%
<b>Non-Sponsored Activities</b>	40%	33%		- 3%	40%	30%
<b>Total Other Effort not requiring certification</b>	<b>40%</b>	<b>33%</b>		<b>-3%</b>	<b>40%</b>	<b>30%</b>
<b>Grand Total</b>	<b>100%</b>	<b>100%</b>		<b>0%</b>	<b>100%</b>	<b>100%</b>

**5** UPDATE CALCULATION

ERS :: ADD ADDITIONAL PROJECT | Close

Display projects where any field contains or equals: 23480 | Filter | Reset

Project ID	Project Title	PI	
0-402120-KM-23551	NIH/NHLBI ANGIOGENIC MCCLOSKEY 3/08 0%	MCCLOSKEY,KARA ELIZABETH	Select
0-402606-KA-21122	UCOP/NSF AGEPII TRAINA 09/09 0%	TRAINA,SAMUEL JUSTIN	Select
0-402606-MP-23550	NIH/NHLBI ALDOSTERON PALLAV. 03/06 0%	PALLAVICINI,MARIA GEORGINA	Select
0-402606-MP-29002	NIH/NIDODCD STEM CELL PALLAV. 12/05 0%	PALLAVICINI,MARIA GEORGINA	Select
0-402610-99-21122	UCOP/NSF AGEPII TRAINA 09/09 0%	TRAINA,SAMUEL JUSTIN	Select

**3a** **3b**

### MULTIPLE CERTIFICATIONS:

For personnel working on projects for multiple departments and a single PI/Supervisor does not have first hand knowledge of ALL activity reflected on the report.

1. Check "Report requires multiple certifications."
2. Click "OK" on the below verification message. Note: doing so will add a comment.

ERS ALERT

Are you sure that you want to require each line of this report to be certified individually?

CANCEL OK **2**

<b>Edit Report</b>	<b>View/History</b>	<b>Comment Log</b>
Version: 1.1 (12/08/2011 02:22)   Status: Open Service Period: March 28, 2011 to June 10, 2011 Pay Periods: April 1, 2011 to June 30, 2011		
<div style="border: 2px solid red; padding: 5px;">         ■ This report will remain open until all lines of the report have been certified.       </div>		
<b>Federal and Federal Flow-Through Sponsored Projects</b>	<b>Payroll % [A]</b>	<b>Paid Effort % to Certify [B]</b>
	<b>N/A to UCLA [C]</b>	<b>Cost Share Effort % to Certify [D]</b>
	<b>Total % [A+C]</b>	<b>Total Effort % to Certify [B+D]</b>
		<b>Line Certified</b>

- Review/Edit/Verify the projects under your department, as applicable
- Add a comment – “Report for fund(s) (list your funds) reviewed & verified by (your name) on (date).” Add additional justification to explain adjustment, as necessary.

<b>Edit Report</b>	<b>View/History</b>	<b>Comment Log</b>
Version: 1.1 (12/09/2011 10:24)   Status: Open Service Period: April 1, 2011 to June 30, 2011 Pay Periods: April 1, 2011 to June 30, 2011		
<div style="border: 2px solid red; padding: 5px;">         ■ This report will remain open until all lines of the report have been certified.       </div>		
<b>Federal and Federal Flow-Through Sponsored Projects</b>	<b>Payroll % [A]</b>	<b>Paid Effort % to Certify [B]</b>
	<b>N/A to UCLA [C]</b>	<b>Cost Share Effort % to Certify [D]</b>
	<b>Total % [A+C]</b>	<b>Total Effort % to Certify [B+D]</b>
		<b>Line Certified</b>
4-441468-LD- 31234 FDP-NIH DK081346 3/12 54%	50%	<input type="text" value="50"/> %
		<input type="text" value="0"/> %
		50%
4-441468-LD- FDP-NIH HL081202 04/12 54%	50%	<input type="text" value="50"/> %
		<input type="text" value="0"/> %
		50%
<b>ADD ADDITIONAL SPONSORED PROJECT</b>		
<b>Total Federal and Federal Flow-Through Sponsored Projects requiring certification</b>	<b>100%</b>	<b>100%</b>
		<b>0%</b>
		<b>100%</b>
<b>Other Sponsored Projects</b>	0%	<input type="text" value="0"/> %
		+ <input type="text" value="0"/> %
		0%
<b>Non-Sponsored Activities</b>	0%	<input type="text" value="0"/> %
		- <input type="text" value="0"/> %
		0%
<b>Total Other Effort not requiring certification</b>	<b>0%</b>	<b>0%</b>
		<b>0%</b>
		<b>0%</b>
<b>Grand Total</b>	<b>100%</b>	<b>100%</b>
		<b>0%</b>
		<b>100%</b>
<b>UPDATE CALCULATION</b>		
<b>Report options:</b>	<input checked="" type="checkbox"/> Report requires multiple certifications. <input type="checkbox"/> Report allows for Cost Sharing Offset Against Other Sponsored Projects. <input type="checkbox"/> Report is under preliminary review	
<b>Add a comment:</b>	Report for fund 31234 reviewed & verified by Cathy on 01/06/12.	

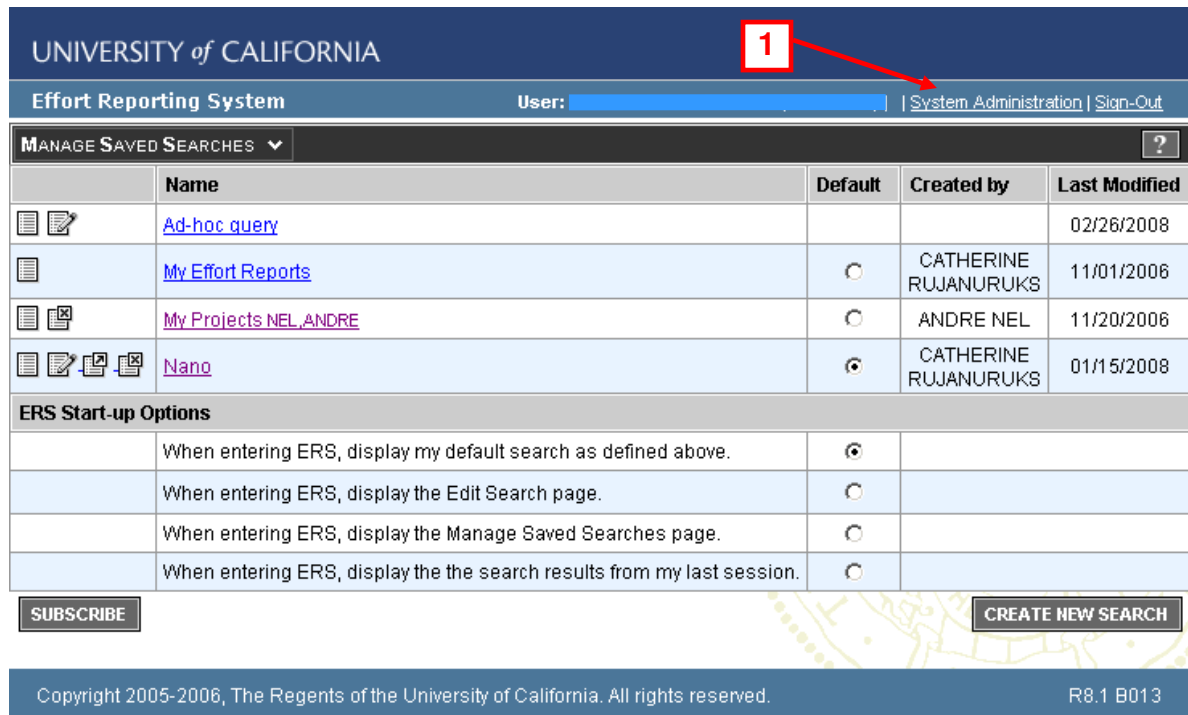
- Save
- Have appropriate supervisor/Faculty member certify

### **BLANK ERS**

ERS Coordinators can create a "blank" ERS report for any employee who had 100% of their time cost shared on unrestricted funds. As a reminder, ERS reports are only automatically generated for personnel paid any percent of their salary off Federal funds.

- Click on the System Administration link at the top right corner





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Effort Reporting System User: [ ] | [System Administration](#) | [Sign-Out](#)

**MANAGE SAVED SEARCHES** [?]

	Name	Default	Created by	Last Modified
	<a href="#">Ad-hoc query</a>			02/26/2008
	<a href="#">My Effort Reports</a>	<input type="radio"/>	CATHERINE RUJANURUKS	11/01/2006
	<a href="#">My Projects NEL, ANDRE</a>	<input type="radio"/>	ANDRE NEL	11/20/2006
	<a href="#">Nano</a>	<input checked="" type="radio"/>	CATHERINE RUJANURUKS	01/15/2008

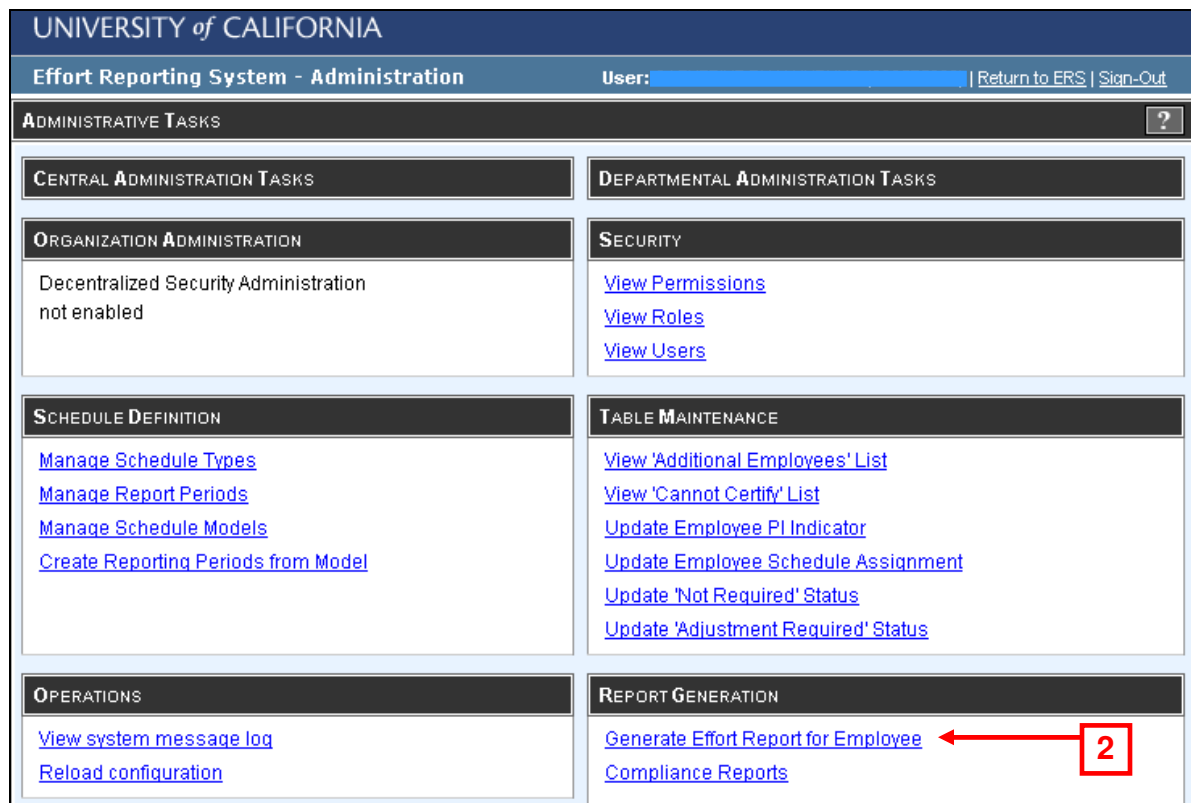
**ERS Start-up Options**

<input checked="" type="radio"/>	When entering ERS, display my default search as defined above.
<input type="radio"/>	When entering ERS, display the Edit Search page.
<input type="radio"/>	When entering ERS, display the Manage Saved Searches page.
<input type="radio"/>	When entering ERS, display the the search results from my last session.

[SUBSCRIBE](#) [CREATE NEW SEARCH](#)

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2. Under Report Generation, click in the “Generate Effort Report for Employee”



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Effort Reporting System - Administration User: [ ] | [Return to ERS](#) | [Sign-Out](#)

**ADMINISTRATIVE TASKS** [?]

<p><b>CENTRAL ADMINISTRATION TASKS</b></p> <p><b>ORGANIZATION ADMINISTRATION</b></p> <p>Decentralized Security Administration not enabled</p>	<p><b>DEPARTMENTAL ADMINISTRATION TASKS</b></p> <p><b>SECURITY</b></p> <p><a href="#">View Permissions</a></p> <p><a href="#">View Roles</a></p> <p><a href="#">View Users</a></p>
<p><b>SCHEDULE DEFINITION</b></p> <p><a href="#">Manage Schedule Types</a></p> <p><a href="#">Manage Report Periods</a></p> <p><a href="#">Manage Schedule Models</a></p> <p><a href="#">Create Reporting Periods from Model</a></p>	<p><b>TABLE MAINTENANCE</b></p> <p><a href="#">View 'Additional Employees' List</a></p> <p><a href="#">View 'Cannot Certify' List</a></p> <p><a href="#">Update Employee PI Indicator</a></p> <p><a href="#">Update Employee Schedule Assignment</a></p> <p><a href="#">Update 'Not Required' Status</a></p> <p><a href="#">Update 'Adjustment Required' Status</a></p>
<p><b>OPERATIONS</b></p> <p><a href="#">View system message log</a></p> <p><a href="#">Reload configuration</a></p>	<p><b>REPORT GENERATION</b></p> <p><a href="#">Generate Effort Report for Employee</a></p> <p><a href="#">Compliance Reports</a></p>

3. Enter Employee ID # and ERS quarter and click “Search”

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Effort Reporting System - Administration User: [ ] | Return to ERS | Sign-Out

[Return to Administration](#)

INDIVIDUAL REPORT GENERATION

Employee ID: 000000000 Generate Report for Period: Fall 07: REG Non-Academics Search

Name: BRUIN, JOE Period Name: Fall 07: REG Non-Academics  
 Employee ID: 000000000 Period ID #: 24  
 Period Status: Complete  
 Period Type: Regular  
 Period Start to End Dates: Oct 01, 2007 to Dec 31, 2007  
 Academic Period Start to End Dates: Oct 01, 2007 to Dec 31, 2007  
 Report Date: Apr 06, 2008  
 Certification Date: Apr 22, 2008

Cancel GENERATE

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4. Click "Generate" & you will see the below message.

Effort Reporting System - Administration User: [ ] | Return to ERS | Sign-Out

[Return to Administration](#)

INDIVIDUAL REPORT GENERATION

Effort Report for employee BRUIN, JOE in reporting period Fall 07: REG Non-Academics has been requested.

5. Search for ERS of newly created employee via "Search Reports" screen.

### WORKSTUDY STUDENTS:

1. Click "Edit Report" tab
2. Under "Report Options" click "Report allows for Cost Sharing Offset Against Other Sponsored Projects" – OK

ERS ALERT

Are you sure that you want to allow Cost Sharing Offset Against Other Sponsored Projects on this report?

This option should only be selected when the sponsor has granted explicit permission allowing effort to be charged to another sponsored project.

CANCEL OK

3. Under "Other Sponsored Projects" or "Non-Sponsored Activities", enter negative workstudy effort
4. Enter that same total amount under "Adjusted Cost Sharing %" of the appropriate Sponsored Projects, split in the appropriate percentages
5. Update Calculation
6. Add a Comment – "Report reviewed, adjusted and verified by (your name) on (date). Other sponsored project (or non-sponsored activity) is workstudy only."
7. Save
8. Have appropriate supervisor/Faculty member certify

Edit Report
View/History
Comment Log

Version: 1.0 (12/02/2011 10:08) | Status: Open  
Service Period: April 1, 2011 to June 30, 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]
4-441357-JL- FDP-NIH HL028481      6/12 54%	50%	50 %		50 %	50%	100%
<div>4</div> <div>ADD ADDITIONAL SPONSORED PROJECT</div>						
<b>Total Federal and Federal Flow-Through Sponsored Projects</b> <i>requiring certification</i>	50%	50%		50%	50%	100%
<b>Other Sponsored Projects</b>	50%	50 %		+ 0 %	50%	50%
				- 50 %		-50%
<b>Non-Sponsored Activities</b>	0%	0 %		- 0 %	0%	0%
<b>Total Other Effort</b> <i>not requiring certification</i>	50%	50%		-50%	50%	0%
<b>Grand Total</b>	100%	100%		0%	100%	100%
<div>5</div> <div>UPDATE CALCULATION</div>						
<div>Report options:</div> <div>2</div> <div> <input type="checkbox"/> Report requires multiple certifications.  <input checked="" type="checkbox"/> Report allows for Cost Sharing Offset Against Other Sponsored Projects.  <input type="checkbox"/> Report is under preliminary review </div> <div>6</div>						
<div>Add a comment:</div> <div>Report reviewed, adjusted &amp; verified by Cathy on 01/06/12. Other Sponsored Project is workstudy only.</div> <div>Comments can be up to 255 characters long. (Total characters: 101)</div>						

VIEW PAYROLL DETAILS
REVERT
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