Objectives

- What is required to be able to access the ERS
- How to access ERS whether on campus or off campus
- Be familiar with the rows and columns in the Effort Report
- Understand what to look for when reviewing the report
What is the Effort Reporting System (ERS)?

- An automated tool for the UC campuses to meet the reporting requirements of the 2 CFR 200.430 (Uniform Guidance) regarding Effort Report

Permission to Use ERS

- Must be an active UCLA employee
- Access to ERS is grantable by Department Security Administrators (DSA) through the Distributed Access Control Security System (DACSS) in OASIS
- Department administrators in conjunction with the department DSA should designate who should have access to the various roles in ERS
ERS Roles in DACCS

Roles are linked to departments and assigned to individuals

- **ER1-View**
  - View only access
- **ER2-EditView**
  - View and Edit access
- **ER3-CertifyEditView**
  - View, Edit, Certify and the ability to re-open effort reports
- **ER4-Payroll**
  - View the payroll detail within ERS
- **ER5-ERCoordinator**
  - Receives all ERS notifications and is the central point of contact for the department. Is able to generate Effort Reports

How to Logon to ERS on Campus

- Enter through the Extramural Fund Management website: [www.efm.ucla.edu](http://www.efm.ucla.edu)
  - Click on Effort Reporting System (ERS)
  - Click on the Effort Reporting System link
- Direct link is [http://ers.it.ucla.edu/](http://ers.it.ucla.edu/)
- If an employee does not have and ID or has forgotten his/her password, go to [https://logon.ucla.edu/activate.php](https://logon.ucla.edu/activate.php)
How to Access ERS Off Campus

- Requires connection to the secured UCLA Network

- **PC Instructions**
  
  If you are using a PC and are trying to log in from off campus you must create a Bruin Online VPN here: [https://www.bol.ucla.edu/services/vpn/pptp/](https://www.bol.ucla.edu/services/vpn/pptp/)

  Scroll to the bottom of the page and select the configuration for your specific operating system

  Follow the step-by-step instructions and screenshots provided

  Once you are connected to the UCLA network via VPN, you can then access the ERS site at [https://ers.it.ucla.edu/](https://ers.it.ucla.edu/). Select UC Los Angeles and use your UCLA login ID

- **Macintosh Instructions**

  If you are using a Macintosh and are trying to log in from off campus please use the following link: [https://www.bol.ucla.edu/services/vpn/](https://www.bol.ucla.edu/services/vpn/)

  Select the appropriate operating system and follow the Configuration Instructions

  Once on the UCLA network, visit [https://ers.it.ucla.edu/](https://ers.it.ucla.edu/) and select UC Los Angeles. You must use your UCLA login ID

Pay Periods

Non-Academic and 11/12 Academics

- **Winter**: January, February, and March
- **Spring**: April, May, and June
- **Summer**: July, August, and September
- **Fall**: October, November, and December
Pay Periods

9/12 Academics
(Employees that work 9 months out of the year, but paid over 12 months)

- **Winter:** November, December, January, and February
- **Spring:** March, April, May, and June
- **Fall:** July, August, September and October
- **Summer:** June, July, August, and September (only additional compensation DOS codes)

Additional Compensation Dos Codes

- (ACA) Additional Compensation – Administrative
- (ACR) Additional Comp- Research
- (ACS) Additional Comp- Self Support
- (ACS) Additional Comp- Teaching
- (ACU) Additional Comp- UNEX
Certification/Report Periods

Although effort reports are split into quarters, they are issued on a semiannual basis (two quarters at a time)

11/12 Academics and Non-Academics
  • Fall/Winter: October-March
    (Fall and Winter Pay Periods)
  • Spring/Summer: April-September
    (Spring and Summer Pay Periods)

9/12 Academics
  • Fall/Winter: July-February
    (Fall and Winter Pay Periods)
  • Spring/Summer: March-September
    (Spring and Summer Pay Periods)

Release Dates and Deadlines

Releases
UCLA releases Effort Reports on a semi-annual basis (two Pay Periods at a time)

  • ~End of April - Fall/Winter Certification Periods
  • ~End of October - Spring/Summer Certification Periods

Deadlines
Effort Reports are due 120 days after the end of the Certification Periods

  • ~July 29th- Fall/Winter Certification Periods
  • ~February 6th- Spring/Summer Certification Periods
### Sample ERS Report

The **Federal and Federal Flow-Through Sponsored Projects** section contains all the federally funded projects on the effort report.

<table>
<thead>
<tr>
<th>Sponsored Projects Section</th>
<th>Federal and Federal Flow-Through Sponsored Projects</th>
<th>Payoff %</th>
<th>Paid Effort % to Certify</th>
<th>NA to UCLA</th>
<th>Cost Share Effort % to Certify</th>
<th>Total %</th>
<th>Total Effort % to Certify</th>
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<td>44%</td>
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<tr>
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<td>100%</td>
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</tr>
</tbody>
</table>
“The Line”

“The line” is a term commonly used when discussing the location of effort. “Above the line” refers to Federal and Federal Flow-Through Sponsored Projects and “below the line” refers to Other Sponsored Projects and Non-Sponsored Activities.

<table>
<thead>
<tr>
<th>Payroll % (A)</th>
<th>Paid Effort % to Certify (B)</th>
<th>WA to UCLA (C)</th>
<th>Cost Share Effort % to Certify (D)</th>
<th>Total % (A+C)</th>
<th>Total Effort % to Certify (B+D)</th>
</tr>
</thead>
<tbody>
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<td>44%</td>
</tr>
</tbody>
</table>

Other Sponsored Projects
- 0% 0% 0% 0%
- Non-Sponsored Activities
- 56% 56% 0% 56%
- Total Other Effort
  - not requiring certification
- Grand Total
  - 100% 100%

Rows “Below the Line”

The rows below the line do not require certification although their accuracy is important

- Other Sponsored Projects – Projects that are not federally funded
- Non-Sponsored Activities – Departmental funding sources
Total Other Effort Row

The total of the Other Sponsored Projects and Non-Sponsored Activities

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<tr>
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</tr>
</tbody>
</table>

Grand Total Row

The Grand Total row should always equal 100%
Columns

Paid Effort % Columns

A - Payroll % (non-editable)
- ERS % salary based off the Payroll ledgers
- Reflects actual % PAID

B - Paid Effort % to Certify (editable)
- ERS % salary based off Payroll ledgers but it’s editable.
- Once Certified or edited, this column will keep the Certified or edited figures even if the payroll ledgers change
- Only adjust if a PET will or has been processed or if an adjustment is needed to make it match column A because column A is correct
Comparing Columns A and B

- When ERS is first generated, both columns match.
- If changes are made and saved in Paid Effort % to Certify [B], future changes in Payroll % [A] by a cost transfer will not automatically change Paid Effort % to Certify [B].
- If columns don’t match and the report is certified, the report status changes to Certified/AdjustReqd.

Cost Sharing and Total Effort

**D - Cost Share Effort % to Certify**
- Records Cost Sharing
- Accounts for Effort without salary (in-kind effort)
- Typically offset from Non-Sponsored Activities (unrestricted funds) although in rare cases it can be offset from Other Sponsored Projects
- Always starts off at 0%

**F - Total Effort % to Certify**
- Total of Paid % and Cost Share Effort % to Certify
- Reflects total effort to be certified, regardless of where and if salary was paid.
Four check points

1) Compare Payroll % with Paid Effort % to Certify - should match
2) Edit Paid Effort % to Certify if appropriate (process that UPAY!)
3) Add Cost Share Effort % to Certify, if applicable
4) Confirm Total Effort % to Certify reflects actual effort expended on the federal project.

Key areas needed to Calculate Effort in ERS
Key Areas of Payroll Detail Report

1. The date used to determine which payroll transaction should be included in the effort report.

2. FAU determines how the payment is categorized for the effort report.

3. Indicates the percent of time that an individual was on pay status during a pay period.

4. The sum of the all the report line items for each block.

5. The Report Total is the sum of all values in the Weighted % column of each block except the Unrecognized Earnings and Excluded Earnings blocks. It is used as the denominator to calculate the Original Payroll% for each line of the effort report.

6. Below each payroll detail block, the Report Details page displays a calculation line which indicates how the value placed on the effort report was calculated.

7. Original Payroll % = Line Item Total / Report Total. This value is placed on the effort report. This is shown on the calculation line below each payroll detail block (6).
### Payroll Detail Report - continued

1. **Pay Period End Date**
   - The date used to determine which payroll transaction should be included in the effort report.

2. **Full Accounting Unit (FAU)**
   - The FAU is what determines how the payment is categorized for the effort report.

3. **Paid %**
   - The value indicates the percent of time that an individual was on pay status during a pay period.

4. **Total**
   - The sum of the all the report line items for each block.

5. **Report Total**
   - The Report total is used as the denominator in calculating the Original Payroll % for each line of the effort report. The Report Total is the sum of all values in the Weighted % column of each block except the Unrecognized Earnings and Excluded Earnings blocks.

6. **Line Item**
   - Below each payroll detail block, the Report Details page displays a calculation line which indicates how the value placed on the effort report was calculated.

7. **Original Payroll %**
   - For each report line, the line item total is divided by the report total to arrive at the Original Payroll % value which is placed on the effort report. This calculation, and the values used, is shown on the calculation line below each payroll detail block.

#### Bi-Weekly Paid Employee

![Bi-Weekly Paid Employee Report](image)
### Bi-Weekly Paid Employee

**Derived %** = Paid % / Average working hours per month  
(e.g. 80 / 174 = .4598)

**Weighted %** = Carried over from Derived %
quiz
Scenario 1: Match Title with Description

<table>
<thead>
<tr>
<th>Report List</th>
<th>Manage Searches</th>
<th>Search Reports</th>
<th>View Payroll Details</th>
<th>Export</th>
<th>Send</th>
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<td>Report requires multiple certifications</td>
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<td>Report allows for Cost Sharing Offset Against Other Sponsored Projects</td>
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<td>Report is under preliminary review</td>
</tr>
</tbody>
</table>

**Version 2.0 (04/10/2009) Certified**

- **Federal and Federal Flow-Through Sponsored Projects**
  - Payroll %
  - Paid Effort % to Certify
  - NIA to UCLA
  - Cost Share Effort % to Certify
  - Total %
  - Total Effort %

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</table>

- **Total Federal and Federal Flow-Through Sponsored Projects requiring certification**
  - Payroll %
  - Paid Effort % to Certify
  - NIA to UCLA
  - Cost Share Effort % to Certify
  - Total %
  - Total Effort %

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</table>

- **Other Sponsored Projects**
  - Payroll %
  - Paid Effort % to Certify
  - NIA to UCLA
  - Cost Share Effort % to Certify
  - Total %
  - Total Effort %

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</table>

- **Non-Sponsored Activities**
  - Payroll %
  - Paid Effort % to Certify
  - NIA to UCLA
  - Cost Share Effort % to Certify
  - Total %
  - Total Effort %

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</table>

- **Total Other Effort not requiring certification**
  - Payroll %
  - Paid Effort % to Certify
  - NIA to UCLA
  - Cost Share Effort % to Certify
  - Total %
  - Total Effort %

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</table>

- **Grand Total**
  - Payroll %
  - Paid Effort % to Certify
  - NIA to UCLA
  - Cost Share Effort % to Certify
  - Total %
  - Total Effort %

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**Report Options**
- Report requires multiple certifications
- Report allows for Cost Sharing Offset Against Other Sponsored Projects
- Report is under preliminary review

**Comment for v.2.0**
- 04/10/09 3:15 PM
- Report certified by [name] on Apr 10, 2009

- A. Projects that require certification
- B. Separates federal and non-federal projects
- C. Column that shows actual payroll
- D. Column that reports total effort
- E. This row should total 100%
- F. Column that shows payroll and is editable
- G. Column that shows the effort for a Federal project but is not charged the Federal project directly
- H. Effort does not require certification
Scenario 1: Answers

<table>
<thead>
<tr>
<th>Scenario 1: Answers</th>
<th>32</th>
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</table>

**Report Details**

- **Report Period:** April 1, 2008 to June 30, 2008
- **Status:** Certified
- **Version:** 2.0 (04/10/2009)

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<tr>
<th><strong>Federal and Federal Flow-Through Sponsored Projects</strong></th>
<th><strong>Payroll %</strong></th>
<th><strong>Paid Effort % to Certify</strong></th>
<th><strong>N/A to UCLA</strong></th>
<th><strong>Cost Share Effort % to Certify</strong></th>
<th><strong>Total %</strong></th>
<th><strong>Total Effort % to Certify</strong></th>
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</tbody>
</table>

**Report Options**

- Report requires multiple certifications.
- Report allows for Cost Sharing Offset Against Other Sponsored Projects.
- Report is under preliminary review.

**Comment for v2.0:**

04/10/09 3:05 PM
Report certified by [Name] on Apr 10, 2009
Scenario 2: How to review effort report

- The employee was hired to work 75% of his time on the PI’s NIH project on fund# 12345 (9/13 – 8/14). Starting in 9/14, the 75% effort was on fund# 54321.

- Summer 2014 Effort Reports were released for certification.
Scenario 2: Was the effort reported correctly in ERS? Why or Why Not?
### Federal and Federal Flow-Through Sponsored Projects

<table>
<thead>
<tr>
<th>Pay Period End Date</th>
<th>Pay Cycle Code</th>
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### Other Sponsored Projects

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<td>MD</td>
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### Non-Sponsored Activities

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<th>Pay Period End Date</th>
<th>Pay Cycle Code</th>
<th>FAU</th>
<th>DOS Code</th>
<th>Teams Code</th>
<th>Title Code</th>
<th>Pay Rate</th>
<th>Rate Type</th>
<th>Paid %</th>
<th>Derived %</th>
<th>Weighted %</th>
<th>Pay Category</th>
<th>Time Code</th>
<th>Pay Cycle End Date</th>
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<tbody>
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<td>MD</td>
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<td>REG</td>
<td>AU</td>
<td>724I</td>
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<td>A</td>
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<td>0.0000</td>
<td>0.0000</td>
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Report Total: (Sum of all weighted percentages) 3.6000
Scenario 2: Answer

- No. The percent of effort was calculated incorrectly.
- Fund 12345 ended “8/14”. Therefore, the September pay period should have been excluded in the calculation.
- The Department should prepare a payroll expense transfer to move the 9/30/14 salary to fund 54321.
Scenario 2: Answer

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<td>Sponsored Projects requiring certification</td>
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</tr>
<tr>
<td>Other Sponsored Projects</td>
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<td>13%</td>
<td>+ 0%</td>
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<tr>
<td>Non-Sponsored Activities</td>
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<tr>
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<tr>
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<td>100%</td>
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</tbody>
</table>

Report options:
- Report requires multiple certifications.
- Report allows for Cost Sharing Offset Against Other Sponsored Projects.
- Report is under preliminary review.

Comment for v1.1: 12/01/14 2:33 AM by LatePay job Payroll activity received after initial report generation.
Scenario 2: Answer-continued
### Scenario 2: Answer-continued

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</thead>
<tbody>
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<td>25%</td>
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<td>25%</td>
</tr>
</tbody>
</table>

Total Federal and Federal Flow-Through Sponsored Projects requiring certification:

- Payroll %: 75%
- Paid Effort %: 75%
- N/A to UCLA: 0%
- Cost Share Effort %: 0%
- Total %: 75%
- Total Effort %: 75%

Other Sponsored Projects:

- Payroll %: 13%
- Paid Effort %: 13%
- N/A to UCLA: < 0%
- Total %: 13%

Non-Sponsored Activities:

- Payroll %: 12%
- Paid Effort %: 12%
- N/A to UCLA: < 0%
- Total %: 12%

Total Other Effort not requiring certification:

- Payroll %: 25%
- Paid Effort %: 25%
- N/A to UCLA: 0%
- Total %: 25%

Grand Total:

- Payroll %: 100%
- Paid Effort %: 100%
- N/A to UCLA: 0%
- Total %: 100%

Report options:
- Report requires multiple certifications.
- Report allows for Cost Sharing Offset Against Other Sponsored Projects.
- Report is under preliminary review.

Comment for v2.0:

02/09/15 12:45 PM by [Unknown]
Report certified by [Unknown] on Feb 9, 2015