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)?

- **E** is for Effort
- **R** is for Reporting
- **S** is for System

- An automated tool for the UC campuses to meet the reporting requirements of the 2 CFR 220 (formerly OMB Circular A-21, Section J.10), 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)

- 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
How to Logon to ERS on Campus

- Enter through the Extramural Fund Management website: www.efm.ucla.edu
  - Click on **Effort Reporting System (ERS)**
  - Click on the **Effort Reporting System** link

- Direct link is http://ers.ais.ucla.edu/

- If an employee does not have and ID or has forgotten his/her password, go to 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: [http://www.bol.ucla.edu/services/vpn/pptp/](http://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.ais.ucla.edu/](https://ers.ais.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: [http://www.bol.ucla.edu/services/vpn/](http://www.bol.ucla.edu/services/vpn/).

Select the appropriate operating system and follow the Configuration Instructions.

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

### Federal and Federal Flow-Through Sponsored Projects

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### Other Sponsored Projects

- 0% Payroll %
- 0% Paid Effort % to Certify
- 0% N/A to UCLA
- +0% Cost Share Effort % to Certify
- 0% Total %
- 0% Total Effort %

### Non-Sponsored Activities

- 56% Payroll %
- 56% Paid Effort %
- -0% N/A to UCLA
- -0% Cost Share Effort %
- 56% Total %
- 56% Total Effort %

### Total Other Effort not requiring certification

- 56% Payroll %
- 56% Paid Effort %
- 0% N/A to UCLA
- 0% Cost Share Effort %
- 56% Total %
- 56% Total Effort %

### Grand Total

- 100% Payroll %
- 100% Paid Effort %
- 0% N/A to UCLA
- 0% Cost Share Effort %
- 100% Total %
- 100% Total Effort %
The **Federal and Federal Flow-Through Sponsored Projects** section contains all the federally funded projects on the effort report.

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“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.
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
The total of the Other Sponsored Projects and Non-Sponsored Activities
Grand Total Row

The Grand Total row should **always** equal 100%
### Federal and Federal Flow-Through Sponsored Projects

<table>
<thead>
<tr>
<th>Project</th>
<th>Payroll %</th>
<th>Paid Effort % to Certify</th>
<th>N/A to UCLA</th>
<th>Cost Share Effort % to Certify</th>
<th>Total % [A+C]</th>
<th>Total Effort % to Certify [B+D]</th>
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</thead>
<tbody>
<tr>
<td>FDP-NIH A1070453</td>
<td>44%</td>
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<td>6%</td>
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<tr>
<td>Total Federal</td>
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<td>44%</td>
<td></td>
<td>6%</td>
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<tr>
<td>Flow-Through Sponsored</td>
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<td>44%</td>
<td></td>
<td>6%</td>
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<td>Total Other Effort</td>
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<td>-6%</td>
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<tr>
<td>not requiring certification</td>
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<td>Grand Total</td>
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### Paid Effort % Columns

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

<table>
<thead>
<tr>
<th>Payroll % [A]</th>
<th>Paid Effort % to Certify [B]</th>
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#### B - Paid Effort % to Certify
- Fund Manager determination of % salary based off their knowledge of changes to Payroll ledgers, i.e. any UPAYs/payroll cost transfers not already reflected in Column A
- Only adjust if a UPAY will be processed and/or has not yet hit the Payroll % column
Comparing Columns A and B

- When ERS first generated, both columns match.
- If changes are made and saved in Payroll %, future changes in Payroll % will not automatically change Paid Effort % to Certify.
- 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.**

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Q&A