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# Effort Reporting

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# Effort Report Certification Status

- The following quarters include UCPATH payroll data:

*As of update date 10/12/2022*

Reporting period	Released	Certified	Open	Total	Certification %
2018 Summer	09/24/20	414	19	433	95%
2018 Fall (modified)	09/24/20	5,430	649	6,079	89%
2019 Winter	09/24/20	4,656	496	5,152	90%
2019 Spring	05/26/21	4,596	835	5,431	84%
2019 Summer	05/26/21	4,822	950	5,772	83%
2019 Fall	05/26/21	4,411	814	5,225	84%
2020 Winter	05/26/21	4,476	832	5,308	84%
2020 Spring	05/26/21	4,343	826	5,169	84%
2020 Summer	05/26/21	4,781	882	5,663	84%
2020 Fall	05/26/21	4,316	809	5,125	84%
2021 Winter	05/26/21	4,367	854	5,221	83%
2021 Spring	11/09/21	4,108	1,430	5,538	74%
2021 Summer	02/14/22	4,200	1,831	6,031	69%
2021 Fall	04/27/22	3,465	2,039	5,504	62%
2022 Winter	04/27/22	3,376	2,038	5,414	62%
<b>Total</b>		<b>61,671</b>	<b>15,304</b>	<b>77,065</b>	

*15,304 Open effort reports to be reviewed for certification*

# Upcoming Release

- Effort reports will be released for the following periods:

Reporting period	Non-Academics and 11/12 Academics	9/12 Academics
Spring 2022	April 2022 – June 2022	March 2022 – June 2022
Summer 2022	July 2022 – September 2022	June 2022 – September 2022(*)

(\*) Additional Compensation earn codes only

- **Target Release:** Late October 2022
- **Certification Due Date:** February 2023
- **All payroll transactions through September 2022 will be loaded in ERS**
- **ERS downtime will be communicated through the ERS Listserv**
  - ERS production site will not be available during release preparation

# Status of UCPath Issues Affecting Effort Reports

## Missing Payroll Lines

	Description in Comments	Status/Action
<b><i>Current</i></b>	Missing payroll record(s) in effort report—do not certify until further instruction is provided by EFM	<ul style="list-style-type: none"> <li>• UCPC fixed the defect causing missing lines in March 2022, therefore there will be no effort reports flagged for this defect in the future.</li> <li>• For previous released effort reports, UCPath Center has provided missing lines which will be loaded during this release.</li> </ul>
<b><i>Future</i></b>	Missing payroll record(s) have been loaded to ERS - Reconcile ERS to Labor Ledger and proceed with certification	<ul style="list-style-type: none"> <li>• Department to reconcile effort reports against labor ledger               <ul style="list-style-type: none"> <li>○ If all lines are accounted for, unflag effort report and proceed with certification</li> <li>○ If labor ledger does not reconcile with ERS, please contact ERS Helpdesk.</li> </ul> </li> </ul>

# Status of UCPath Issues Affecting Effort Reports

## Mass Leave Correction (MLC)

	Description in Comments	Status/Action
<b>Current</b>	Pending Mass Leave Correction (MLC) entry—do not certify until further instruction is provided by EFM	<ul style="list-style-type: none"> <li>• In March 2022, Business and Finance Solutions corrected errors related to exception taken (e.g. VAC, SKL) for July 2021- October 2021 via MLC.</li> <li>• EFM has load MLC corrections to ERS, and effort reports flagged for this defect are now ready for certification.</li> <li>• No additional effort reports are being flagged for this defect as part of the upcoming effort report release</li> </ul>
<b>Future</b>	Mass Leave Corrections (MLC) have been recorded to ERS- Review payroll details in ERS and proceed with certification	<ul style="list-style-type: none"> <li>• Review payroll details in ERS               <ul style="list-style-type: none"> <li>○ If distribution reflected in ERS is correct, unflag effort report and proceed with certification.</li> <li>○ If distribution includes error, please contact ERS Help.</li> </ul> </li> </ul>

# Status of UCPATH Issues Affecting Effort Reports

## Incorrect Percent of Effort

	Description in Comments	Status/Action
<b>Current</b>	Incorrect percent of effort for effort bearing payroll line—review supplemental Excel file and job aid provided by EFM before certification	<ul style="list-style-type: none"> <li>Zero effort percent due to missing hours is still an open defect UCLA continues to work with UCPATH Center to address.</li> <li>Last supplement Excel files provided to campus were through the Winter 2019 effort reporting period. Distribution of additional supplement Excel files were pending corrections for missing lines and MLC.</li> </ul>
<b>Future</b>	Comment to remain the same	<ul style="list-style-type: none"> <li>As part of the upcoming release, EFM will resume the distribution of supplement Excel files as missing lines and MLC corrections are loaded to ERS</li> <li>Department to follow instructions provided in job aid to be provided with supplement Excel file and move forward with certification.</li> </ul>

# Status of UCPATH Issues Affecting Effort Reports

Y-OTC or N-OTC Indicator is Missing

	Description in Comments	Status/Action
<b>Current</b>	Y-OTC or N-OTC indicator is missing—do not certify until further instruction is provided by EFM	<ul style="list-style-type: none"> <li>UCLA continues to work with UCPATH Center to find a solution</li> </ul>
<b>Future</b>	Review effort report to ensure correct effort distribution and calculations	<ul style="list-style-type: none"> <li>For hourly employees               <ul style="list-style-type: none"> <li>EFM will unflag effort reports during the upcoming release because this issue does not impact the effort percentage of hourly employees</li> </ul> </li> <li>For monthly employees               <ul style="list-style-type: none"> <li>If distribution is reflected in ERS as expected, unflag effort report and proceed with certification.</li> <li>If distribution includes error, please contact ERS Help.</li> </ul> </li> </ul>

# Additional Communication to Follow

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- **Communication via ORA Listserv**
  - Release announcement of Spring and Summer 22 effort reports
  - Notice of updated comments on flagged effort reports and web updates
  - Schedule to load subsequent direct retros processed to ERS
  - Notice of upcoming ERS LMS course scheduled for 11/14/22 & 11/15/22
- **Communication to ERS Coordinators**
  - Automated notice usually sent on the 15<sup>th</sup> with list of Open/Overdue Effort Reports will be sent following release announcement of Spring and Summer 22 effort reports.
  - List of effort reports flagged with a “Certified” status will be shared with department ERS Coordinators. Effort reports to be reviewed and unflagged by department accordingly.



# Any Questions?

## Contact Information

### EFM Website

<https://efm.research.ucla.edu>

### ERS Help Desk

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