

ERS Job Aid – Quick Reference Guide - Coordinators

ERS SIGN-IN [?]

User Name: [1] Go to ERS Site

Password: [2] Log in using your UCSB NetID and Password

[SUBMIT] [CANCEL]

If you do not have a password, or you do not remember your password, click [here](#) to receive an e-mail that will allow you to create a new password.

UNIVERSITY of CALIFORNIA

Effort Reporting System User: Shawna Radman | Account Settings | System Administration | Sign-Out

[REPORT LIST] [MANAGE SEARCHES] [SEARCH REPORTS] [Export List] [Send List] [Print List] [?]

Display Saved Search: [3] Navigate to Managed Saved Searches List

Show Status: [4] Open the desired saved search

Reporting Periods: All Select: [5] Choose the desired status

Display reports per page displaying 1 to 20 (79 total)

Pls in bold and highlighted

Period	Employee	Department	Last Modified	Status	Under Prelim Review
Period 1 (June-Sept 2010)	CHURCH,RICHARD L (834308375)	GEOGRAPHY DEPT	11/12/2010 v1.0	Not Required	
Period 1 (June-Sept 2010)	CLARKE,KEITH C (831805716)	GEOGRAPHY DEPT	11/12/2010 v1.0	Not Required	
Period 1 (June-Sept 2010)	DICKEY,TOMMY D (846818924)	GEOGRAPHY DEPT	11/12/2010 v1.0	Not Required	
Period 1 (June-Sept 2010)	GOODCHILD,MICHAEL F (851096491)	GEOGRAPHY DEPT	11/12/2010 v1.0	Not Required	
Period 1 (June-Sept 2010)	GOULIAS,KONSTADINOS (870245366)	GEOGRAPHY DEPT	11/12/2010 v1.0	Not Required	

[6] Choose the desired reporting period

[7] Select an Effort Report to review

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

GRIGSBY,ERIK SHANE | 13 PERIOD JUN 2013 - SEP 2013 Report 1 of 2253

Emp. ID:813242966 | Home Dept: GEOGRAPHY DEPT

[Edit Report] [View History] [Comment Log]

Version: 1.1 (01/28/2014 04:27) | Status: Adjustment Required
 Reporting Period: June 1, 2013 to September 30, 2013
 Pay Periods: June 1, 2013 to September 30, 2013

Sponsored Projects	Original Effort %	Adjusted Effort %	Original Cost Sharing %	Adjusted Cost Sharing %	Original Total %	Adjusted Total %
8-447680-22100-FJF03 NSF 1302236 FREW_7/2016	46%	<input type="text" value="0"/> % [9A]		<input type="text" value="0"/> % [9B]	46%	0%
Total Sponsored Projects requiring certification	46%	0%		0%	46%	0%
Other Sponsored Projects	0%	<input type="text" value="46"/> %		+ <input type="text" value="0"/> %	0%	46%
Non-Sponsored Activities	54%	<input type="text" value="54"/> %		- <input type="text" value="0"/> %	54%	54%
Total Other Effort not requiring certification	54%	100%		0%	54%	100%
Grand Total	100%	100%		0%	100%	100%

[8] View payroll details

[9] Edit the Effort Report

A. Adjust the percentage in the adjusted payroll % column if applicable

B. Add additional sponsored projects if payroll was not setup correctly

C. Activate the checkbox if the report requires multiple certifications.

[9C] [UPDATE CALCULATION]

Report options: Report requires multiple certifications. [10] Enter your reason for making the changes
 Report allows for Cost Sharing Offset Against Other Sponsored Projects
 Report is under preliminary review

Add a comment: [8] [11] Save the changes

Comments can be up to 255 characters long. (Total characters: 0)

[VIEW PAYROLL DETAILS] [REVERT] [SAVE] [CERTIFY EFFORT REPORT] [12] Notify the PI's that Effort Reports are ready for review and certification.

Report 1 of 2253

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Training Information

For a better understanding on what is **effort reporting** please go to the following link and select “Training on Effort Reporting- Principle Investigators”:

<http://accounting.ucsb.edu/forms/?unit=Extramural%20Fund%20Management>

For a better understanding on what is **cost sharing** please go to the following link and select “Cost Share Training for Investigators”:

<http://accounting.ucsb.edu/forms/?unit=Extramural%20Fund%20Management>