UNIVERSITY OF CALIFORNIA, MERCED
QUICK START GUIDE FOR EFFORT REPORT CERTIFIERS

This guide provides effort certifiers with basic information needed to use the UCM Effort Reporting System (ERS). For more detailed information, refer to the online *ERS Guide* at:

LOGGING INTO THE EFFORT REPORTING SYSTEM

1. Navigate to the ERS page: http://ers.ucup.edu/ucm

2. Enter your UCM NetID (the part before @ucmerced.edu in your e-mail address) and UCM NetID password, then click **SIGN ON**.

DISPLAYING THE LIST OF EFFORT REPORTS TO CERTIFY

1. Select **My Certifications** from the **Display Saved Search** dropdown menu. (If **My Certifications** is not listed, select **My Effort Reports**.)

2. Select **All-Open** from the **Show Status** dropdown menu.

3. Click the **All** radio button next to **Reporting Periods**.

4. Click on the name of the employee whose effort report you wish to review.

Period ▼	Employee	Department	Last Modified	Status
Fall 2011	**CRACKER, JACK (123456789)**	COMPUTER & ELEC ENGR AT SOE3	01/09/2012 v1.0	Open
Fall 2011	LAST, FIRST (234567890)	COMPUTER & ELEC ENGR AT SOE3	02/27/2012 v1.1	Open

REVIEWING AND CERTIFYING EFFORT REPORTS
Refer to the screen shot on the next page for an annotated example of an effort report. Circled letters in next section refer to screen shot.

1. Click on the **Comment Log** tab to review system or Research Accountant comments.

2. Click the **Edit Report** tab to review the employee project funding information and percent effort based on the pay periods covered by the reporting quarter.

3. The **Adjusted Payroll %** column (A) shows the percent of effort before any cost sharing. The **Original Payroll %** column (B) shows the percent of effort calculated from payroll records.

    a. In most cases, the Original and Adjusted Payroll % columns will be equal; however, if there is a difference, it means that additional payroll transfers are pending and the Comment Log should provide you with information.

    b. If the **Adjusted Payroll %** is not accurate, consult with your divisional Research Accountant.

4. Any cost sharing on a federal fund is indicated in the **Actual Cost Sharing %** column (C). For information on how to update a cost sharing percentage contact your divisional Research Accountant.

5. If you see the following message at the top right of the report screen

it indicates that this employee had effort on multiple federal funds, and the report requires certification by more than one Report Certifier. You will need to check the box(es) in the **Line Certified** column to indicate which federal fund(s) you are certifying. For more information, refer to: Certifying an Effort Report with Multiple Certifications.

6. You are certifying the percentages in the **Adjusted Total %** column (D)

    a. This amount is the sum of the **Adjusted Payroll %** and **Actual Cost Sharing %**.

    b. Total effort in the **Grand Total** (E) must equal 100%.

7. If the amounts are correct, click **CERTIFY EFFORT REPORT** (F) to bring up the **Certify ERS Report** popup window.

    a. By clicking **CONFIRM** you are certifying the following:

        • You have first-hand knowledge of the effort reflected on the report

        • The distribution of effort expended during the reporting quarter is a reasonable estimate

    b. Click **CANCEL** to go back to reviewing the report.

TIPS

• After each report is certified, ERS automatically brings up the next employee's effort report.

• Scroll back and forth through your list of reports using the report navigation arrows. (G)

PERFORMING A FINAL REVIEW

1. Return to your list of effort reports by clicking the **REPORT LIST** tab (H).

2. Check the **STATUS** column to determine if you have additional reports to review (reports with statuses OTHER THAN Certified or Not Required).

LOGGING OUT

To log out of ERS, click **Sign-Out** at the top right of the screen.

<div style="background-color:#e2ead0;">

NEED HELP?

- Detailed instructions and links to reference materials:

- Effort reporting policy questions or making changes to an Effort Report: contact your Divisional Research Accountant.

- Using ERS, or if you are unsure where to get help for a specific question: email ERS Help at PPFM@ucmerced.edu

</div>

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

JACK, CRACKER | FALL 2011
Emp. ID: ▓▓▓▓▓▓▓ | Home Dept: SOCIAL SCIENCES-E

◁▷ ◁ Report 10 of 12 ▷ ▷▷

Edit Report | View/History | Comment Log

Version: 1.1 (01/31/2012 04:57) | Status: Open
Service Period: October 1, 2011 to December 31, 2011
Pay Periods: October 1, 2011 to December 31, 2011

Federal Sponsored Projects	Original Payroll %	Adjusted Payroll %	Committed Cost Sharing %	Actual Cost Sharing %	Original Total %	Adjusted Total %
21436 ~ 444102 NSF ISS0953908 ZHANG 8/15 FDP ~ ENGR/TIM/Rsch/Zhang	28%	38 %		0 %	28%	38%
23535 ~ 444102 DOED R305180596 SCOTT 6/12 ~ ENGR/TIM/Rsch/Zhang	11%	11 %		0 %	11%	11%
23535 ~ 445264 DOED R305180596 SCOTT 6/12 ~ SOCSCI/ED/Rsch/Scott	3%	3 %		0 %	3%	3%
						ADD ADDITIONAL SPONSORED PROJECT
Total Federal Sponsored Projects *requiring certification*	42%	52%		0%	42%	52%
Other Sponsored Projects	0%	0 %		+ 0 %	0%	0%
Non-Sponsored Activities	58%	48 %		− 0 %	58%	48%
Total Other Effort *not requiring certification*	58%	48%		0%	58%	48%
Grand Total	100%	100%		0%	100%	100%
						UPDATE CALCULATION

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

Add a comment:
[   ]

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

| VIEW PAYROLL DETAILS | | REVERT | SAVE | CERTIFY EFFORT REPORT |

Left margin annotations:
- Federal awards for which employee has received pay.
- Non federal payroll funding.