HOW TO GET STARTED IN ERS
ERS Basics

- ERS Website [http://www.efm.ucla.edu/EffortRpt.htm](http://www.efm.ucla.edu/EffortRpt.htm)

System Tool

Effort Reporting System (ERS)

- What is Effort Reporting? Definition, clarification, etc... - coming soon
- Effort Reporting Policies
- What is ERS?
- ERS Training Modules
  - ERS Portal (Production)
  - ERS Support: ERS Help Desk (ershelp@resadmin.ucla.edu)
  - ERS FAQ’s
- ERS Newsletters
- ERS Coordinator’s Contact List
- ERS Certification Cycle Proposed Schedule
- ERS Bugs and Enhancements List and Status Updates - coming soon
- Version Upgrade Documents - New Features & Enhancements - coming soon
- ERS Testing - Test Scripts
- ERS Management and Compliance Reports - coming soon

Training Modules

FAQs
ERS Basics

◆ Access to ERS
  - Must be an active UCLA employee
  - Requires a UCLA Logon ID and Password
    - 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)
  - Requires connection to the secured UCLA Network
    - If an employee is trying to access ERS from off-campus, s/he must connect via Bruin OnLine (BOL) Virtual Private Networking (VPN)
    - Instructions on how to connect to BOL VPN are found [http://www.bol.ucla.edu/services/vpn/pptp/](http://www.bol.ucla.edu/services/vpn/pptp/)
## ERS Basics

### Sponsored Projects

<table>
<thead>
<tr>
<th>Project ID</th>
<th>Original Payroll %</th>
<th>Adjusted Payroll %</th>
<th>Original Cost Sharing %</th>
<th>Adjusted Cost Sharing %</th>
<th>Original Total %</th>
<th>Adjusted Total %</th>
</tr>
</thead>
<tbody>
<tr>
<td>4-441353-N4-FDP-NIH AI070453</td>
<td>44%</td>
<td>44%</td>
<td>6%</td>
<td>50%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Total Sponsored Projects (requiring certification)

- Original Payroll %: 44%
- Adjusted Payroll %: 44%
- Adjusted Cost Sharing %: 6%
- Adjusted Total %: 50%

### Other Sponsored Projects

- Original Payroll %: 0%
- Adjusted Payroll %: 0%
- Adjusted Cost Sharing %: 0%
- Adjusted Total %: 0%

### Non-Sponsored Activities

- Original Payroll %: 56%
- Adjusted Payroll %: 56%
- Adjusted Cost Sharing %: -6%
- Adjusted Total %: 50%

### Total Other Effort (not requiring certification)

- Original Payroll %: 56%
- Adjusted Payroll %: 56%
- Adjusted Cost Sharing %: -6%
- Adjusted Total %: 50%

### Grand Total

- Original Payroll %: 100%
- Adjusted Payroll %: 100%
- Adjusted Cost Sharing %: 0%
- Adjusted Total %: 100%
ERS Basics

- **Original Payroll % (non-editable)**
  - ERS estimation of % salary based off the Payroll ledgers
  - Reflects actual % PAID

- **Adjusted Payroll %**
  - Fund Manager determination of % salary based off their knowledge of changes to Payroll ledgers, i.e. any UPAYs/payroll cost transfers
  - Only adjust if a UPAY will be processed and/or has not yet hit the Original Payroll column

- When ERS 1st generated, both columns match. If changes are made & saved in Adj Pay %, future changes in Orig Pay % will not automatically change Adj Pay % to match.
### ERS Basics

#### Adjusted Cost Sharing %
- Records changes to Cost Sharing
- Accounts for Effort without salary (in-kind effort)
- Can only be adjusted from non-sponsored activities (unrestricted funds), except in the case of Work Study

#### Adjusted Total %
- Total of Adjusted Payroll and Adjusted Cost Sharing
- Reflects total Effort to be certified, regardless of where salary was paid

<table>
<thead>
<tr>
<th>Adjusted Cost Sharing %</th>
<th>Original Total %</th>
<th>Adjusted Total %</th>
</tr>
</thead>
<tbody>
<tr>
<td>6%</td>
<td>44%</td>
<td>50%</td>
</tr>
<tr>
<td></td>
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</tr>
<tr>
<td><strong>ADD ADDITIONAL SPONSORED PROJECT</strong></td>
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<tr>
<td>6%</td>
<td>44%</td>
<td>50%</td>
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<tr>
<td>-6%</td>
<td>56%</td>
<td>50%</td>
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<tr>
<td>-6%</td>
<td>56%</td>
<td>50%</td>
</tr>
<tr>
<td>0%</td>
<td>100%</td>
<td>100%</td>
</tr>
</tbody>
</table>
ERS Basics

- The effort distribution should be checked against the departments internal controls for verifying payroll distribution and monitoring UPAYs.
- The effort distribution should also be checked against the sponsor approved budgets and progress reports.
- In addition to individual department shadow systems, the ERS Detail Report will be available to campus, starting May 7th.
  - Be on the lookout for a Campus-wide email communication containing the link to download the ERS Detail Report.