Effort Reporting System (ERS) Research Accountant Quick Start Guide

ERS Help: ers_help@ucsc.edu (8am to 5pm Monday - Friday)
ERS URL: http://ers.ucsc.edu/

Login to ERS: Click the “Launch ERS” button to bring up the CruzID login page.

CruzID Login: Enter CruzID Gold credentials.

Additional ERS information can be found in the Effort Reporting System Guide.

Navigate and Subscribe to My Certifications List

➢ **NAVIGATE:** Click the page title to navigate between pages

➢ **SUBSCRIBE:** Find the Effort Reports your PI needs to review and certify

  1. From Management Searches page, click the “Subscribe” button on the bottom left corner of page.

  2. Find PI, and click “Subscribe” next to PI’s name for the My Certifications and the My Projects list.


Questions to ask when deciding whether or not to certify an Effort Report

REMEMBER – The certifier MUST have first-hand knowledge of the effort

1. **Is the Effort Report for another PI or Faculty member?**
   - YES: DO NOT certify
   - NO: Go to question 2

2. **Does PI have first-hand knowledge of all effort on the Effort Report?**
   - YES: PI can certify entire report
   - NO: Go to question 3

3. **Does PI have first-hand knowledge of some effort on the Effort Report?**
   - YES: Use Multiple Certification feature so PI can certify individual row(s)
   - NO: DO NOT certify anything

**Find Effort Reports (after you've Subscribed and Saved Searches)**

➢ **VIEW EFFORT REPORT LIST:** Navigate to Effort Report List page
  (or click on a saved search from Manage Searches page)

○ Display Saved Search: switch between saved searches
○ Show Status: filter list by specific status (or “ALL”)
○ Reporting Periods: filter list for specific Reporting Period (or “ALL”)

IMPORTANT: Filters remain set until you select a new value

➢ **VIEW EFFORT REPORTS:**
  - From Effort Report List, click on the row to view an Effort Report
  - Use arrows to scroll through a list of Effort Reports