

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

REPORT LIST

MANAGE SEARCHES

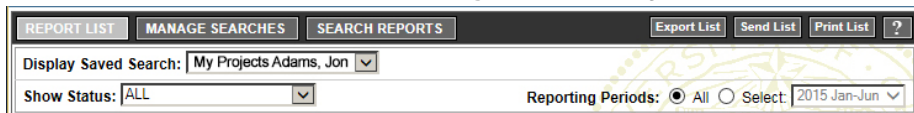
SEARCH REPORTS

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

1. From **Manage 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.
[This adds a **My Certifications and My Projects** search to your **Manage Searches** page, which are available for future searches.]
3. Repeat step 2 for each PI (or Report Certifier) under your responsibility.

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

⏪ ⏩ displaying 1 to 27 (27 total) ⏪ ⏩

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