This guide provides effort certifiers with basic information needed to use the UCSC Effort Reporting System (ERS). For more detailed information, refer to the online ERS Guide at: https://financial.ucsc.edu/Pages/Systems_ERSGuide.aspx

LOGGING INTO THE EFFORT REPORTING SYSTEM
1. Navigate to the ERS Launch page: http://ers.ucsc.edu and click on Launch ERS.
2. Enter your CruzID (the part before @ucsc.edu in your e-mail address) and CruzID Gold password, then click SIGN ON. For more info on CruzID Gold, visit https://cruzid.ucsc.edu

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.

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.
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QUICK START GUIDE FOR EFFORT REPORT CERTIFIERS

PERFORMING A FINAL REVIEW
1. Return to your list of effort reports by clicking the REPORT LIST tab.
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.

NEED HELP?
• Detailed instructions and links to reference materials: http://ers.ucsc.edu
• 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 ers_help@ucsc.edu