Effort Reporting System (ERS) Best Practices, Tips, Reminders from campus subject matter experts

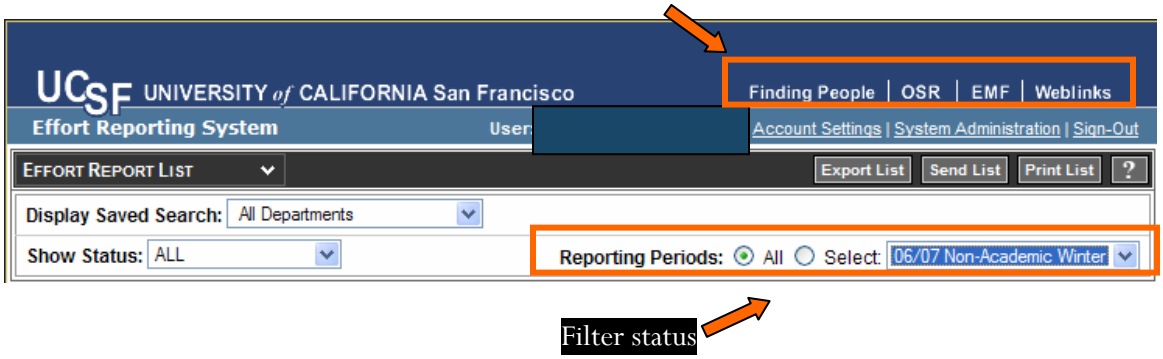
ERS Customer Support: 514-4100, Option 3 (8am-5pm, Mon-Fri)

Best practice:

EMF and LINK teamed up to check in with our ERS campus subject matter experts after the ERS rollout and we found that the most successful departments or divisions had their research services analysts (RSAs) communicate regularly with their PIs. Often, the RSAs set up meetings to go over effort reporting as a concept, introduce PIs to ERS, and walk the PIs through the first cycle or two.

Links to Directory, OSR, EMF, and Weblinks

Tip: No need to open a new browser window to find ERC's or PI's contact information. With a single click of a button, see below, you can easily navigate to that page e.g., CLS, OSR, EMF, and Weblinks. These direct links can be found at the top right corner of every page on ERS.



Reminder: The Reporting Periods filters remain set until you select a new value so always check to ensure it is accurate for your current search. Utilizing filters will help you better manage your effort reports.

Project PI vs. Fund PI

When scrolling your cursor over a fund-dpa on the Effort Report, the pop-up box will reflect the fund PI, which can be different from the project PI at the fund-dpa-fy level. If the fund PI is different from the project PI and they are the certifier, those Effort Reports will NOT appear on their "My Projects List". Reviewers can build a list and share with their PI.

PI's My Projects List vs. Subscribing to PI's list

To find the effort reports your PI needs to review and certify, simply go to the "manage saved searches" page, click "subscribe" button on bottom left corner. Find your PI, and click "subscribe" next to PI's name.

Multiple certification

This should be treated as an exception situation. It may be common to have many fund-dpas, but it is not always necessary to exercise this option. Review the question box on your ERS Quick Start Guide to determine when the Multiple Certification feature should be used.

Re-opening certified reports

Anybody who can certify the Effort Report (Fund PI, Project PI, Self-Certifier) can un-certify it even if they weren't the original certifier. What happens after? There is a ripple effect in terms of system-generated emails notifying those who have already certified each line.

Delegation of authority

This should be treated as an exception situation. Requests should be submitted by your department Access Administrator giving authority via the online ERS User Access Form. We are currently working on modifying the form and streamlining our processes.

Updating PI IDs in RAS and Account Fund Profile (AFP)

Please email change requests to Michael.Grafton@ucsf.edu and title the subject line of your e-mail **PI ID Change Request.** Please remember to send a copy of the DPA/Fund/FY inquiry for the current competitive cycle, and highlight those DPA/Fund/FY combinations for which the PI ID must change.

We are only allowed to update PI IDs for open fund years because we can't alter history in the AFP system.

User IDs and Training resources for new academics and self-certifiers

How do I get a UserID?
If you have an academic appointment, first contact your department ERC. If you are not a PI, please ask your ERC if you are authorized to self-certify. If your ERC does not have your logon, please contact the help desk at 514-4100, option 3 (8am-5pm, Mon-Fri).

Self-certifier and PI Training can be found here: http://acctg.ucsf.edu/ers/index.htm

Training resources for new ERS administrative users

All ERS department administrators are required to complete the **WebCT ERS Training Course** before gaining access to the system. First, you will need a Galen Account (http://cit.ucsf.edu/webct/login.php) in order to register and take the course in WebCT. Once in WebCT, choose "Add a Course" and then select "ERS Training Course" under the category "Staff Training". For help, first contact your ERC and then call Customer Support, 514-4100, Option 3.

UserIDs are normally set up through your access administrator via the online access application form: http://acctg.ucsf.edu/ers/system_access/ERSrequestSubmit.htm

You can always refer back to Intro to Effort Reporting here:
http://acctg.ucsf.edu/ers/overview/index.htm. It includes definitions, FAQs, definitions, terminology, and contact resources.