

Effort Reporting 2009

Key Tasks and Due Dates for ERS Coordinators

Completed	Due Date	Task
	Sept 30	Use the DS-324 report to ensure that all awards meet the campus minimum effort requirement (Ref: Directive 06-049) or submit a valid exception to Extramural Funds Accounting (EFA). Cost Sharing Guidance: https://accounting.ucdavis.edu/tp/extramural/costsharing/
	Oct 1-30	Default cost share entries will be generated in the Cost Share Tracking System for any awards that do not meet the campus minimum effort requirement (Ref: Directive 06-049) unless an exception was approved. Default cost share entries will be included on the effort reports. Account managers will be notified by e-mail if default cost share entries were made on their behalf and they should verify the percentages and accounts for accuracy. Cost Sharing Guidance: https://accounting.ucdavis.edu/tp/extramural/costsharing/
	Oct 30	Submit requests to update ERS permissions for new employees or changes in responsibilities; please use the latest forms. View access: http://accounting.ucdavis.edu/forms/ERS_Access_Form.dot Certify access: http://accounting.ucdavis.edu/forms/ERS_Access-Cert_Form.dot
	Nov 2-11	Ensure visibility of your reports: verify subscriptions to all PI 'My Projects' lists; make 'Saved Searches' for any miscellaneous employees or accounts; update saved searches for your Emeritus Faculty PIs. ERS Website: http://myeffort.ucdavis.edu
	Nov 2-11	Review the 2009 ERS Update for Coordinators: http://accounting.ucdavis.edu/ers/briefingmods/2009_ERS_Coordinator_Update.cfm Review additional training information as needed. ERS web site: http://accounting.ucdavis.edu/ers/
	Nov 2-11	Prepare for meetings with your faculty as needed during the certification period, make appointments now for those hard-to-reach PIs
	Nov 12	EFA target date to notify ERS Coordinators that effort reports will be released in two (business) days; Coordinators begin advance review/analysis of reports if needed. Effort Reporting System (ERS): http://myeffort.ucdavis.edu
	Nov 16	EFA target date to notify PIs that the 30 day certification period has begun and certifications must be completed by Dec 16; Coordinators meet with certifiers as needed. Effort Reporting System (ERS): http://myeffort.ucdavis.edu

	Nov 16 to Dec 16	EFA will send a weekly ERS status report for your unit; Coordinators must follow up as needed to ensure completion of all certifications by Dec 16.
	Dec 16	Certification period ends; all effort reports must be certified.
	Dec 21	Cost transfers must be completed by noon to resolve reports with Certified/AdjustReqd status; this is the last December PPS compute.