

## **Step-by-Step Guide**

### *Certifying Electronic Personnel Effort Reports (ePERs)*

### **What is an ePER? What is Certification?**

If you work on a sponsored project, you are required to certify effort on that project. Certification provides assurance to the sponsor that the effort being put into a project matches the effort paid by grant funding.

Project employees are required to certify their electronic Personnel Effort Report, or ePER. (Hourly employees who work on sponsored projects typically certify effort on their timesheets.) You can review your ePER online in your portal, make changes in effort reported as appropriate, and certify the effort. If you adjust your effort to be less than the salary paid on the project, your campus ePER contact will review for possible creation of a Payroll Expense Transfer (PET).

This Step-by-Step Guide focuses on how to find, review, and certify your ePER online.

- If you have questions on your ePER, or on the effort reporting process in general, consult your campus ePER contact.
- Training is available on the ePER process via your campus portal. Use the Training dropdown menu to select Start SkillSoft. The course name is *CU: ePER, electronic Personnel Effort Reporting*.

### **Overview of the automated ePER process**

If you are required to certify effort on a sponsored project, you will receive an email after the end of the semester with instructions. *The subject line of the email will read "Your ePER Requires Certification."*

If you do not certify the ePER within 75 days of its initial creation, you will receive a reminder email notification. You will also receive a reminder after 100 days, and again at 120 days. After 120 days past the initial ePER creation, you will receive an email reminder every 10 business days until it is certified.

### **Certification**

To begin the process, log in to your campus portal. On the **CU Resources** tab, select **NavBar, CU Resources, Business Tools, ePERS**.

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You will see three search options:

- **Current:** ePERs that need to be certified
- **Recertification Required:** ePERs that need to be recertified. *Recertification may occur due to changes in payroll/effort.*
- **History:** ePERs that have already been certified

Empl ID: 100028    Rupert,Mark

Current	
2016 - Fall	Not Complete
2016 - Summer	Not Complete

Recertification Required	
2015 - Fall	Revised PER Issued

History	
2016 - Spring	Complete
2015 - Summer	Complete
2015 - Spring	Complete
2014 - Fall	Complete
2014 - Summer	Complete

The **Current** and **Recertification Required** sections identify ePERs for which you have an action to complete.

The specified ePER now displays for your certification:

**Payroll Distribution %** shows the % of your salary paid by the project listed on this ePER during the semester.

**Pay with Cost Share effort/NIH Cap** (if relevant) includes payroll plus any additional percentage of effort you have committed to the project that will be covered by other university funding sources.

**Total Other Institutional Support** (if relevant) includes the % of salary paid for *non-project* effort by any funding sources other than Funds 30/31. You must enter a value in this field, even if it's 0, in order to certify.

Position # 00007132 Job Code # 1204 - Senior Clinical Instructor					Supervisor: Rosenberg Ph.D.,Cordelia C Robinson		
SpeedType	Project Number Project Description	Sponsor ID Award Number	PI Name	Payroll Distribution Amount	Payroll Distribution %	Pay with Cost Share effort/ NIH Cap	Actual Effort %
<b>SPONSORED PROJECTS</b>							
63010362	2582628 ACF UCEDD.EXP	ACF 90DD0699-04-00	Friedman,Sandra Lee	\$117.77	1	1	<input type="text"/>
63008978	2582421 CDE RESULTS MATTER	CDE CORE 2015-0328	Edelman,Larry I	\$5,542.29	47	47	<input type="text"/>
<b>OTHER INSTITUTIONAL SUPPORT</b> Other Institutional Activities includes instruction, service, department administration, departmental research, clinical duties, including those paid through UPI and included as part of your University appointment. It does not include effort associated with non-university appointments (e.g., VA appointments). If you committed effort as cost sharing on a project, the effort should be included in the Sponsored Projects section above for the applicable project.							
<b>Total Other Institutional Support</b>					52	52	<input type="text"/>
<b>Total Position #00007132 must equal 100</b>					100	100	<input type="text"/>
<b>Total Employee #103192 must equal 100</b>					100	100	<input type="text"/>

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### Certifying Electronic Personnel Effort Reports (ePERs)

Your total effort for all positions combined (project effort plus non-project effort) must equal 100%, whether you work full or part-time. In other words, your project effort is not measured by 40-hour work weeks, but by the portion of your total work. *You will not be able to certify your ePER unless it totals 100%.*

To calculate effort, you will use this equation:

$$\frac{\text{Average weekly project hours}}{\text{Average weekly CU hours}} = \% \text{ Project effort}$$

#### Examples:

- You worked 44 hours/week on this project. You did not perform any other university work. Therefore, you contributed 100% (44/44) of your university effort to the project.
- You worked 20 hours/week on this project and 10 additional hours/week on other university activities. Therefore, you contributed 66% (20/30) of your university effort to the project.

Enter the correct actual percentages in the **Actual Effort %** column, according to the equation and scenarios above. *Only whole numbers should be used — don't enter decimals or %.*

To certify your ePER, Click the CERTIFY button in the lower left of the screen.

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<b>Total Employee #103192 must equal 100</b>				100	100		<input type="text" value="100"/>

Message from webpage

Are you sure you're ready to complete ePER? Once it is confirmed you will not be able to change your effort, and you will be directed to a review page.

**II. Certify This Report:**  
 Certification by employee OR Certification by responsible official  
 I certify that the above estimate of effort expended is accurate and covers all work performed during the stated period.

As of Date: 3/14/2017

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*The certify button will remain grey until the total effort for your position equals 100%.*

By certifying, you are agreeing that the effort entered is a reasonable estimate of your actual work during the time period.

The system asks you to verify your action.

- If you click CANCEL, you will return to the ePERs screen for additional update prior to certification.
- If you click OK, you will see a message displayed at the top of the form. From there, you can print the ePER or log out of the portal.

### **Uncertification**

If you have made a mistake in the certification process, you will need to uncertify your ePER. Consult your campus ePER contact.