

ePERS

**Knowledge Based Workshop
January 26, 2021**



Campus Controller's Office
UNIVERSITY OF COLORADO **BOULDER**

Be Boulder.

Ask Questions at Any Time

Using the Q&A Feature



Meet Our Presenter

Elizabeth Spencer

Associate Director
Accounting

Moderated by:

Carol Shannon Training & Development Specialist

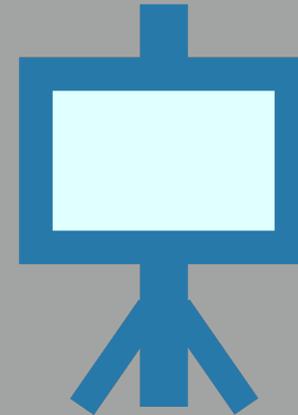
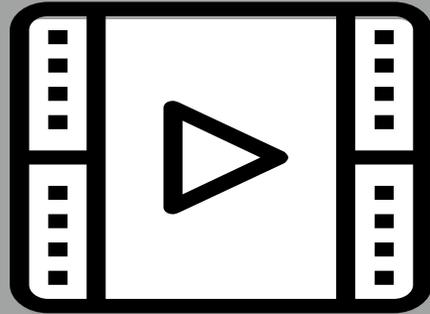


Campus Controller's Office
UNIVERSITY OF COLORADO **BOULDER**

Be Boulder.

Recording and Slides Available:

colorado.edu/controller/training



Agenda

Item 1



ePER Fundamentals

Item 2



ePER Certification

Item 3



ePER Resources



Definitions

Effort: Amount of time spent by an employee on a particular activity during a certain period of time, expressed as a percentage (%) of the total time worked by the employee during that same period. ([CU Boulder ePER Policy](#))

Effort Reporting: A requirement for recipients of federal awards as a means of attesting to the appropriateness of salaries and wages charged to the contract or grant.

ePER/ePERs: Electronic Personnel Effort Report(s) in our certification system.

Certifying ePER: Verifying/confirming the work performed. (i.e. effort)



Purpose of Certifying an ePER

Per Uniform Guidance (UG) §200.201; §200.430:

- Effort is required to be certified in writing
- Compensation must be based on records that reflect the work performed

Per CU boulder ePERs - Policy and Procedure:

- Compensation distribution must reflect certified effort (CU Boulder)



Who Gets an ePER?

ePER is created for **faculty, staff, or graduate students** who received any amount of salary from a sponsored project, and/or had committed cost sharing on a sponsored project.

ePERs are not generated for **hourly employees** with the job codes that start with a 4, 5 or 32 and **LASP employees**. Biweekly timesheets represent the official effort record for an hourly employee.



Understanding How ePER Works

The total effort for all positions combined (project effort plus non-project effort) must equal 100%, whether the project employee works full-time or part-time.

In other words, the project effort is not measured by 40-hour work weeks, but by the portion (percentage) of the total work. The employee's total effort is always 100%.



Understanding How ePER Works

Step One: To calculate effort, use this equation:

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

Example: Employee worked 44 hours/week on sponsored project and did not perform any other university work. Therefore, the employee contributed 100% - (44/44) of their university effort to the project.



Understanding How ePER Works

Step Two:

$\% \text{ sponsored project effort} + \% \text{ non-sponsored project effort} = 100\%$
Total Effort on ePER.

Example: Employee worked 20 hours/week on sponsored project and 10 additional hours/week on other university activities. Therefore, the employee contributed 67%-(20/30) of their university effort to the project.



Timing of ePERS

The Office of the University Controller (OUC) manages & maintains the ePER system.

ePER Periods			
Semester	Generated	Calendar Dates	Accounting Period
Spring	Jun	Jan 1 – May 31	Period Code: 11
Summer	Sep	Jun 1 – Aug 31	Period Code 2
Fall	Jan	Sep 1 – Dec 31	Period Code 6

- **Initial Notice** (automated email from system): Sent after the ePER is initially generated by the system
- **Reminder Notices:** Sent 75, 100, and 120 calendar days after the initial ePER is sent
- **Past Due Notices:** Sent every 10 days once the ePER has passed 120 calendar days



ePERS Certification

Primary Certifier: ePER must be certified by the project employee.

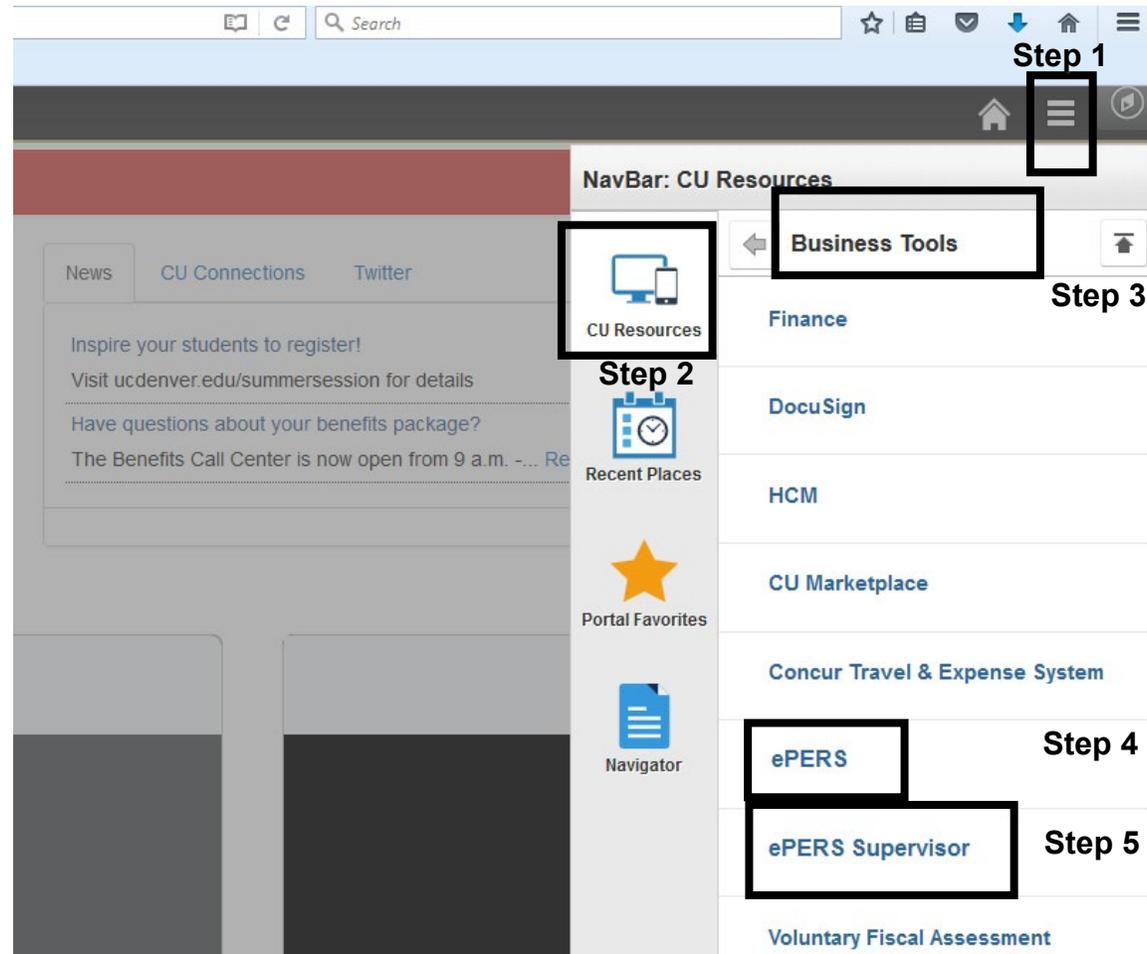
Alternate Certifier: A responsible official in a position of authority who has suitable means of verification that the work was performed as stated on the ePER.

Examples: Project Investigator, Chair, Director, Dean

* It is **not permissible** for a departmental support person, such as an administrative assistant, program assistant or office manager, to certify the ePER.



Accessing the ePER System



This link is for employees who need to certify their own ePERs.

This link is for supervisors who need to certify their employees' ePERs.



Review your ePERS

Empl ID: 123456 Smith, Mike Refresh

Current	
2017 - Fall	Not Complete

→ Uncertified ePERs

Recertification Required	
2006 - Summer	Revised PER Issued

→ Uncertified ePERs

History	
2017 - Summer	In Process
2017 - Spring	Complete
2016 - Fall	Complete
2016 - Summer	Complete
2016 - Spring	Complete
2015 - Fall	Complete
2015 - Summer	Complete
2015 - Spring	Complete
2014 - Fall	Deleted - Issued in Error

→ Certified ePERs



ePER Supervisor View

Reports to: 123456

Smith, Mike

Refresh

Current			
2017 - Summer	111111	Smith, Bruce	Not Complete
2017 - Summer	222222	Smith, Charles	Not Complete
2017 - Summer	333333	Smith, Scott	Not Complete
2017 - Spring	444444	Smith, Nelson	Not Complete
2017 - Spring	555555	Bruce, Bruce	Not Complete
2016 - Fall	666666	Hodges, Bruce	Not Complete
2016 - Fall	777777	Wilson, Bruce	Not Complete
2016 - Summer	888888	David, Long	Not Complete
2016 - Summer	999998	Nelson, Bruce	Not Complete
2016 - Spring	101010	Long, Lee	Not Complete
2016 - Spring	101012	Lee, Lee	Not Complete
Recertification Required			
2015 - Fall	101013	Wilson, Hall	Revised PER Issued
2015 - Fall	101014	Joseph, Patrick	Revised PER Issued
History			
2017 - Summer	101015	Emiel, Scott	Complete
2017 - Summer	101016	Lee, Patrick	Complete



ePER Certification-Certify Online

University of Colorado

Personnel Effort Report

[Print](#) [BACK TO MAIN PAGE](#)

Reporting Period: September - December 2017 (Fall) Status: Current (Not Certified)

Name: Smith, Mike
Employee ID: 123456
Job Status: Active

I. Report Your Actual Distribution Effort:

Need help?
[Step by Step Guide to Certifying ePERs](#)
[ePERS Online Training](#)
[Boulder Campus](#)

Your [effort](#) compensated by CU should total 100%. Even if you are employed part-time or have multiple positions, your effort is 100% of your time at CU and does not equate to your [appointment](#) percentage.

You should not certify this document if total effort does not total 100% or if you have negative percentages. Instead, stop

Position # 00678788 Job Code # 1438 - Post-Doctoral Fellow					Supervisor: Smith, Kathy		
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 %
SPONSORED PROJECTS							
13012345	33K1234 NIH CNCR TRAINING S2	ABC 5 T32 CA174648-05	Not Available	\$16,072.00	100	100	<input type="text"/>
OTHER INSTITUTIONAL SUPPORT 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.					0	0	<input type="text"/>
Total Other Institutional Support					0	0	<input type="text"/>
Total Position #00678788 must equal 100					100	100	<input type="text"/>
Total Employee # 123456 must equal 100					100	100	<input type="text"/>

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.

Actual Effort has to be a positive value. Each position must equal the stated percentage and the total percentage must equal 100.

[CERTIFY](#)

Step 1: Review

- Employee Info
- Period
- Certification Status
- Fund 31/30 Work activities and payroll
- Non-fund 31/30 work activities
- Distribution total=100%

Step 2: Certify Sponsored Project work activities - fill out the Actual Effort % box

Step 3: Certify all other work activities not paid on sponsored project - fill out the Actual Effort % box

Step 4: If the "CERTIFY" button doesn't turn yellow, click anywhere outside of the box to allow system to refresh the data and activate the "CERTIFY" button

Step 5: Click the "CERTIFY" button. The certification process is complete



ePER Certification-pdf

University of Colorado
 Personnel Effort Report
 Reporting Period: September - December 2017 (Fall) Status: Current (Not Certified)

Name:	Smith, Mike
Employee ID:	123456
Job Status:	Terminated

I. Report Your Actual Distribution Effort:

Your effort compensated by CU should total 100%. Even if you are employed part-time or have multiple positions, your effort compensated (excluding stipends) by CU should total 100%.

Your effort is 100% of your time at CU and does not equate to your appointment percentage.

You should not certify this document if total effort does not total 100% or if you have negative percentages. Instead, stop and contact your Payroll Liaison.

Position # 00678788 Job Code # 1438 - Post-Doctoral Fellow					Supervisor: Kelly, Kirt		
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 %
SPONSORED PROJECTS							
13045678	33M1245 NIH CNCR TRAINING S2	ABC 5 T32 CA174648-05	Not Available	\$16,072.00	100	100	
OTHER INSTITUTIONAL SUPPORT 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.							
Total Other Institutional Support					0	0	
Total Position #00678788 must equal 100					100	100	
Total Employee # 123456 must equal 100					100	100	

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: 3/14/2018

Step 1: Send a request to Effort & Cost Management Accountant / Boulder Campus eper contact with a reason why you need a PDF file

Step 2: Forward the eper PDF file to appropriate person that can verify employee effort

Step 3: Certifiers need to fill out each % box, sign and date the eper anywhere in the PDF file

Step 4: Send the signed PDF file to Effort & Cost Management Accountant

Step 5: Effort & Cost Management Accountant / Boulder Campus eper contact will certify online based on the signed PDF file and retain the signed PDF on file



CU-Data Reports

Login to **CU-Data** and select **ePERS**

The screenshot shows a web browser window with the URL <https://cu-data.cu.edu/bi/?perspective=classicviewer&id=i4A250E2F45B94A2F8ED20732F57B6382&module=bi!>. The browser tabs include "MyCUInfo | University of C..." and "Uncertified ePERS by Org o...". The browser's address bar shows the URL. Below the browser window, the application interface is visible. On the left, a navigation menu lists "Team content" and several folders: "Advancement_QS", "Asset Management", "CUBLD", "ePERS" (highlighted), "eRA", "Finance", and "MotioCI". On the right, the "ePERS" section is displayed with a list of reports. Three reports are highlighted with black boxes: "ePERS Summary by Org", "ePERS Summary by PI", and "Uncertified ePERS by Org or Campus". To the right of these boxes, text labels indicate the report types: "Certified and Uncertified ePERS" for the first two, and "Uncertified ePERS" for the third. The "All ePERS by Project" report is also visible at the bottom of the list.

Report Name	Report Type
ePERS Summary by Org	Certified and Uncertified ePERS
ePERS Summary by PI	Certified and Uncertified ePERS
Uncertified ePERS by Org or Campus	Uncertified ePERS
All ePERS by Project	



ePER Resources

Training and Policy

- ePER Training: <http://www.cu.edu/controller/epers-training>
- ePER Resources: <http://www.colorado.edu/controller/about-us/sponsored-projects-accounting/compliance/epers>
- ePER Policy: <http://www.colorado.edu/controller/epers-policy-and-procedure>

Boulder Campus Contact Information

- ePER general email box: epers@colorado.edu
- Lin Yang – Effort and Cost Mgmt. Accountant: lin.yang@Colorado.edu



Questions?



Before you go, please complete the feedback survey
(https://cuboulder.qualtrics.com/jfe/form/SV_3LflmsOkmCSjSzl).

Thank you!