ePERS
Knowledge Based Workshop
January 26, 2021
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
Recording and Slides Available:

[link to recording: 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:
% sponsored project effort + % 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.
The Office of the University Controller (OUC) manages & maintains the ePER system.

### Timing of ePERS

<table>
<thead>
<tr>
<th>ePER Periods</th>
<th>Generated</th>
<th>Calendar Dates</th>
<th>Accounting Period</th>
</tr>
</thead>
<tbody>
<tr>
<td>Spring</td>
<td>Jun</td>
<td>Jan 1 – May 31</td>
<td>Period Code: 11</td>
</tr>
<tr>
<td>Summer</td>
<td>Sep</td>
<td>Jun 1 – Aug 31</td>
<td>Period Code 2</td>
</tr>
<tr>
<td>Fall</td>
<td>Jan</td>
<td>Sep 1 – Dec 31</td>
<td>Period Code 6</td>
</tr>
</tbody>
</table>

- **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

Step 1

Step 2

Business Tools

Step 3

Step 4

ePER

Step 5

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

<table>
<thead>
<tr>
<th>Empl ID: 123456</th>
<th>Smith, Mike</th>
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</table>

**Current**
- 2017 - Fall: Not Complete

**Recertification Required**
- 2006 - Summer: Revised PER Issued

**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

- Uncertified ePERs
- Uncertified ePERs
- Certified ePERs
ePER Supervisor View

<table>
<thead>
<tr>
<th>Reports to: 123456</th>
<th>Smith, Mike</th>
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**Current**

<table>
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<tr>
<th>Year</th>
<th>Course</th>
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<th>Status</th>
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</thead>
<tbody>
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<tr>
<td>2017 - Summer</td>
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<td>Smith, Charles</td>
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<tr>
<td>2017 - Spring</td>
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<td>Wilson, Bruce</td>
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<tr>
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<tr>
<td>2016 - Spring</td>
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<td>Lee, Lee</td>
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</table>

**Recertification Required**

<table>
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<th>Year</th>
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<th>Name</th>
<th>Status</th>
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<tbody>
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<tr>
<td>2015 - Fall</td>
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<td>Joseph, Patrick</td>
<td>Revised PER Issued</td>
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</tbody>
</table>

**History**

<table>
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<tr>
<th>Year</th>
<th>Course</th>
<th>Name</th>
<th>Status</th>
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</thead>
<tbody>
<tr>
<td>2017 - Summer</td>
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<tr>
<td>2017 - Summer</td>
<td></td>
<td>Lee, Patrick</td>
<td>Complete</td>
</tr>
</tbody>
</table>
ePER Certification-Certify Online

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

**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.

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**University of Colorado**

Personnel Effort Report

**Reporting Period:** September - December 2017 (Fall)

**Name:**

**Employee ID:** 123456

**Job Title:** Temp

1. Report Your Actual Distribution Effort:

   - **Your effort** computed by CU should total 100%. Even if you are employed part-time or have multiple positions, your effort computed (including students) for CU will be 100%.
   - **Your effort** is 100% of your time at CU and does not equal 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.

2. **Actual Effort %**

   - **Position #:** 00678980 Job Code # 1420 - Post Doctoral Fellow
   - **Supervisor:** John Doe
   - **Project:** SPONSORED PROJECTS
     - **Sponsored Projects Name:** ABC 123
     - **Grant #:** 123ABC
     - **Payroll Distribution:** $16,072.00
     - **Actual Effort %:** 100

3. **Other Institutional Support:**

   Other Institutional Activities (other than those paid through NIH) includes, but is not limited to, additional research, clinical, or other work.

   - **Total Other Institutional Support:** $0
   - **Total Pay:** $16,072.00

4. **Total Effort %:**

   - **Total Position #:** 60678980 must equal 100
   - **Total Effort %:** 100

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**Certification by employee OR Certification by responsible official:**

I certify that the above estimate of effort expressed is accurate and covers all work performed during the stated period.

As of: 03/14/2018

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CU-Data Reports

Login to CU-Data and select ePERs

Certified and Uncertified ePERs

Certified and Uncertified ePERs

Uncertified ePERs

Campus Controller’s Office
UNIVERSITY OF COLORADO BOULDER
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

Campus Controller’s Office
UNIVERSITY OF COLORADO BOULDER
Questions?

Before you go, please complete the feedback survey (https://cuboulder.qualtrics.com/jfe/form/SV_3LflmsOkmCSjSz!).

Thank you!