

**Effort Reporting System
Requirements Group
Notes of the January 12, 2006 Meeting
Accepted February 9, 2006**

Attendees: Cynthia Kane (UCB), Rochelle Caballero (UCLA), Rick Valdivia (UCLA), Dan Gilbreath (UCSD), James Ringo (UCD), Jorge Ohy (UCOP), Pixie Ogren (UCLA), Adam Cohen (UCOP), Deb Nikkel (UCOP)

Review of 12/8/2005 Meeting Notes

The 12/8/2005 Meeting Notes were reviewed and accepted with minor modifications.

Follow-ups from Previous Meetings

Management Group Report

Pixie reported on the January 11 Management Group meeting. A decision was made and the Management Group agreed to work with a company to take the training content that Deb has produced and put it into a finished training package with animation and audio. NIIT has been identified and work will begin shortly to develop the finished product.

Dan asked about the earliest start date for UCOP hosting. Adam replied that UCOP was proceeding with planning for hosting and that hosting should be an option when campuses were ready to implement ERS.

Pixie reported on when campuses plan to implement ERS.

There was also a discussion about an issue raised by Riverside concerning the reporting of effort for work study employees working on federal contracts and grants. Work study payments are split between work study funds and the matching funds (in this case a federal contract or grant) and because the work study fund is included in the Other Sponsored Projects category, the full amount of effort does not show on the federal contract or grant. Riverside had asked how ERS would handle reporting that portion of the effort. The Requirements Group discussed the matter and agreed that the effort charged to the work study funds should be recorded as cost sharing on the federal project and that the user could enter the information on the Effort Report.

Quality Assurance Testing – Update

Adam reported on the Quality Assurance Testing stating that although the testing continues it was essentially complete. Dan Gilbreath asked about the QA testing for San Diego data. Adam confirmed that the emphasis had been on the two pilot campuses but that they would begin looking at San Diego data shortly.

**Effort Reporting System
Requirements Group
Notes of the January 12, 2006 Meeting
Accepted February 9, 2006**

Dan raised a question about whether ERS would reissue Effort Reports when retroactive Cost Sharing data was provided to ERS. Pixie responded that ERS does not recognize cost sharing data by reporting period as it does for pay and that any imported cost sharing data is assumed to apply to the current reporting period. Dan said it would be important to reissue Effort Reports based on retroactive cost sharing information because it was common to wait until the end of the project period to record cost sharing data in the cost sharing system. Pixie will talk with Dan offline.

Pilots – Update

Rick and James reported on the progress of pilots at UCLA and Davis. Both reported good progress although piloting has been delayed in favor of first resolving technical and processing issues.

Saving Out of Balance Effort Report

Pixie raised the question of whether or not ERS should allow a user to save an Out-of-Balance Effort Report. After some discussion it was decided that allowing users to save an out-of-balance report would only delay the problem or in the case of an Effort Report requiring multiple certifications could actually pass the problem on to another user. The decision was made not to allow an out-of-balance report to be saved.

Next Meeting

The next meeting is scheduled for February 9, 2006 from 1:00pm-3:00pm. This will be conducted via conference call. Call-in number: 866-740-1260; passcode 9870518.