Update to Procedure 1315 PR.04 Effort Reporting Using ERS

On Tuesday, February 26, 2013, revised and newly titled Procedure 1315 PR.04 Effort Reporting was posted to the Policy & Procedure website. The procedure features updated information based on recent feedback, and includes a new monitoring and departmental escalation process. Revision highlights are provided below. If you are involved in the effort reporting process, please review this document in its entirety.

1. Under the section, Completing the Certification Process, additional tasks have been added i.e., Task 1b Identifying Faculty that have left the University and Task 1c Notify Certifiers of the Open Effort Period.

   - Task 2 Pre Review, Task 3 Certification and Task 4 Post Review have been expanded to include proactive steps to assist in obtaining certification.

2. A Task Summary Matrix has been added and serves as an easily extractable reference tool to assist departments throughout the certification cycle.

3. The Reason Code Analysis section has been replaced with a proactive Monitoring and Departmental Escalation process. The section includes a table with the range of days, activity, dependent activity and suggested performance indicators.

4. An Appendix has been added to be used in support of Task 1c. This Appendix contains a sample email to Certifiers announcing the effort certification cycle.

If you have any questions, after reviewing the document in its entirety, please contact effort.reports@yale.edu.