Job Aid: Assigning a Designee to a Project Statement

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Overview:

Circumstances where a PI is unable to certify a project statement (for a reason such as terminated, extended leave, etc...) necessitate a designee assignment in ECC, so statements can be certified on their behalf. A person with suitable knowledge of the work performed over the course of the period can be added as the designee in these situations. This can be a department Dean/Director/Chair/Division Head.

If there is a new PI for a grant, and they should be the one certifying the project statements, this process can be used to allow them to certify temporarily. Long term, Workday should be updated to reflect the new PI, after which ECC's data will get updated too, and future project statements for that grant worktag will be associated with the new PI (contact GCA to request the PI to be updated). The existing designee assignment should be removed after the new PI is reflected as the PI in ECC.

Designees must be added to project statements on an individual basis. Meaning, if the PI who is unable to certify has multiple statements for a period, the following process will have to be done for each one of those statements.

Adding a Designee – Search Bar Method:

1. Use the main search bar of ECC, and type in the GR number of the statement you want to add a designee to

	0							
WASHINGTON						GR XXXXXX Transferring to page.		٩
		Home	Certify	Manage	Reports	Administration	Links	
Home Page	About							

 From the "Account Summary" page that opens, select the "Manage Account Designee" subtab

UNIVERSITY of WASHINGTON						Enter Search	Criteria	٩	Hello, Austin Ba
	Home	Certify	Manage	Reports	Admir	nistration	Links		
Home Page About									
ccount Summary							🙆 Sponsore	d Project Emplo	vee Summary Report
ccount Name:	Example		A	Associated Departme	nt(s):	CAS Ph	/sics - Center fo	or Nuclear Partic	ie and
ccount Nickname:	Example		A	ward Name:					
ccount Number:	GR XXXXXX		5	start to End Date:		06/01/20	23 to 05/31/	2024	
ccount PI:	PI	Primary Effort	1	Account Manager:		Austin Ba	tes		
					_	show	more >>		
Project St	atements		Covered Inc	lividuals			Manage A	.ccount Desig	mee
Associated Project Statemen	ts								
Period				Pro	oject Certific	ation Status			
2023 - 10/1 to 12/31				E	Building				

3. Type the name of the person you are adding as the designee last name *space* first name (or EID), and select them from the dropdown menu

Add Account Designee		
Select Certification Designee	hart justin	
Select Effective Start and End Dates	Hart Justin A	

Nothing found to display.

5.

Associated Account Designee

- 4. Enter effective start and end dates.
 - a. **Important:** the start date of the designee must be within the period of the earliest report the designee is certifying for. For example, if the designee is certifying a report for 7/1/2024 9/30/2024, the effective start date must be within 7/1/2024 9/30/2024 for the designee to be able to certify.
 - b. Ensure the end date you enter is far enough in the future for the designee to log in and certify the report. Then click "Add Designee".

Add Account Designee							
Select Certification Designee	Hart Justin A -						
Select Effective Start and End Dates	07/01/2023	07/31/2024	6				
Nothing found to display.							
Current Account Designee							Add Designee
Nothing found to display.							
After this the	designee i	s added. I	fy	ou need to delete or a	idjust the	e desigr	nee
assignment, u	use the ico	ns in the "	Άc	tion" or "Delete Desig	nee" col	umns	
Current Account Designee							Add Designee
Designee Name		Effective Start Date		Effective End Date	Action	Delete Designee	
Justin A Hart		07/01/2023		07/31/2024	@ Q #	0	

6. The person you add as a designee will also need the "Certifier" role in ECC to complete the certification of the project statement(s). This role can be requested to be given to them by emailing <u>effortreporting@uw.edu</u>

Adding a Designee – Department Dashboard Method:

1. Navigate to the "Manage" menu tab, then select "Department Dashboard"

WASHINGTON						Enter Search Cri	iteria	٩	Hello, Austin Bates -
	F	Iome	Certify	Manage	Reports	Administration	Links		
Look-up	Department Dashboard	Plac	e Statements On	Hold •••					
Work List for	Austin Bates								0
Welcome to Huron's E	Employee Compensation Con	npliance appl	lication. The tab(s) b	elow contain variou	s tasks that require y	our attention.			

2. Select the cost center that has the project statement(s) that you want to add a designee for from the dropdown list. Click "Choose"

Department Dashboard

Search for Department :

	C103330- CAS Physics - Research	•	Choose
C	CC103323- CAS Physics - Academics		
	C103329- CAS Physics - Center for Nuclear Particle and Astrophysics C103330- CAS Physics - Research		
Department	Dashboard		

Search for Depa	artment :		
	CC103330- CAS Physics - Research	•	Choose

3. Go to the "Project Certifications" tab, and select a period from the period dropdown

Department Dashboard for CAS | Physics - Research - CC103330

This page contains all the inform information about projects, and in Search for Department :	ation relevant to the department, in nformation about administrators for	ncluding all statements, r this department.	
		•	Choose
Effort Certifications	Project Certifications	Award and Account	Department Information
Project Certification Summar	y Chart: Employee Type UWF	Period 7/1/2023 to Department, for the current period	9/30/2023 v d of performance
Status	UV	VP	
Auto Approved	2		
Ready for Pre Review	97	98.98%	
		(If you would like to search for	r an anostronha, nlaasa antar two anostronk

- 4. For the row of the grant number you need to add a designee to, click the document icon
 - 🖿 under the "Action" column

Project Certifications	Award and Accou	nt Department Inform	nation		
Chart: Employee Type t statements for all projects in t	JWP Period 7/1/2 this Department, for the current	023 to 9/30/2023 t period of performance			
	UWP				
	2				
	97 98.98%				
Project Number	Q (If you would like to sea to return results) Grant Manager	rch for an apostrophe, please ei	ter two apostrophes	Statements	Action
CC103330	Parks, David	0	N/A		
	Parks, David	0	N/A		
				v	
GRXXXXXX	Parks, David	G	CAS Physics - Academics	•	
GRXXXXXX GR XXXXX1	Parks, David Parks, David	0	CAS Physics - Academics CAS Physics - Academics		
GRXXXXXX GR XXXXX1 GR XXXXX2	Parks, David Parks, David Parks, David	0	CAS Physics - Academics CAS Physics - Academics CAS Physics - Academics	0 0 0	
GRXXXXXX GRXXXXX1 GRXXXXX2 GRXXXXX3	Parks, David Parks, David Parks, David Parks, David	0 0 0	CAS Physics - Academics CAS Physics - Academics CAS Physics - Academics CAS Physics - Academics	0 0 0 0	

5. From the "Account Summary" page that opens, select the "Manage Account Designee" subtab

WASHINGTON						Enter Search C	Criteria	٩	Hello, Austin I
	Home	Certify	Manage	Reports	Adm	inistration	Links		
Home Page Abo	ut								
Account Summary	7						🛯 Sponsored	Project Employee	e Summary Repo
Account Name:	Example		Α	Associated Departmen	t(s):	CAS Phy Astrophys	sics - Center for	Nuclear Particle	and
Account Nickname:	Example		Д	ward Name:					
Account Number:	GR XXXXXX		s	start to End Date:		06/01/20	23 to 05/31/2	024	
Account PI:	PI	Primary Effort	Α	Account Manager:		Austin Bat	tes -		
						show	more >>		
Projec	et Statements		Covered Ind	lividuals			Manage Ac	count Design	ee
Associated Project State	ments								
Period				Proj	ect Certifi	cation Status			
2023 - 10/1 to 12/31				8	Building				
2023 - 7/1 to 9/30				0	Ready for	Pre Review			
							Excel	MXML	PDF BR

6. Type the name of the person you are adding as the designee last name *space* first name (or EID), and select them from the dropdown menu

Add Account Designee		
Select Certification Designee	hart justin	
Select Effective Start and End Dates	Hart Justin A	Ê

Nothing found to display.

- 7. Enter effective start and end dates.
 - a. Important: the start date of the designee must be within the period of the earliest report the designee is certifying for. For example, if the designee is certifying a report for 7/1/2024 9/30/2024, the effective start date must be within 7/1/2024 9/30/2024 for the designee to be able to certify.
 - b. Ensure the end date you enter is far enough in the future for the designee to log in and certify the report. Then click "Add Designee".

Add Account Designee				
Select Certification Designee	Hart Justin A -			
Select Effective Start and End Dates	07/01/2023	8	07/31/2024	m
Nothing found to display.				
Current Account Designee				
Nothing found to display.				

8. After this the designee is added. If you need to delete or adjust the designee assignment, use the icons in the "Action" or "Delete Designee" columns



Add Designe

9. The person you add as a designee will also need the "Certifier" role in ECC to complete the certification of the project statement(s). This role can be requested to be given to them by emailing effortreporting@uw.edu