

# Job Aid: Assigning a Designee to a Project Statement

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## Overview:

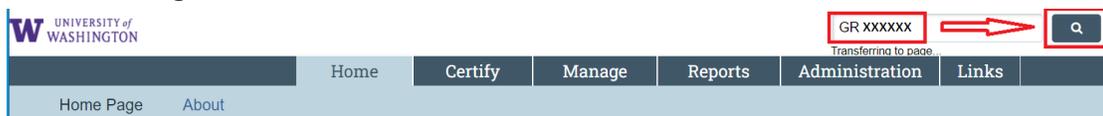
Circumstances where a PI is unable to certify a project statement (for a reason such as terminated, extended leave, etc...) necessitate a designee assignment in ECC, so statements can be certified on their behalf. A person with suitable knowledge of the work performed over the course of the period can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



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

The screenshot shows the 'Account Summary' page with a navigation menu at the top. The 'Manage Account Designee' link is highlighted with a red box. Below it, there is a table of 'Associated Project Statements' with columns for 'Period' and 'Project Certification Status'. The table shows two rows: one for '2023 - 10/1 to 12/31' with status 'Building', and another for '2023 - 7/1 to 9/30' with status 'Ready for Pre Review'.

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

Select Effective Start and End Dates

Nothing found to display.

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

Select Effective Start and End Dates

Nothing found to display.

Current Account Designee

Nothing found to display.

5. 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

Current Account Designee

Designee Name	Effective Start Date	Effective End Date	Action	Delete Designee
Justin A Hart	07/01/2023	07/31/2024		

Associated Account Designee

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 [effortreporting@uw.edu](mailto:effortreporting@uw.edu)

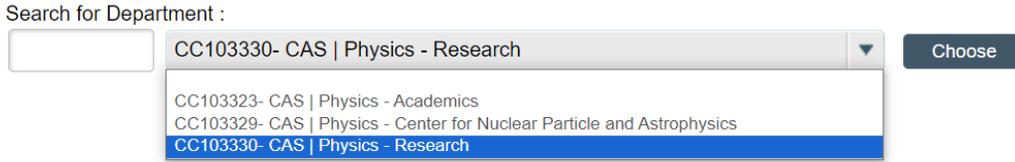
## Adding a Designee – Department Dashboard Method:

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

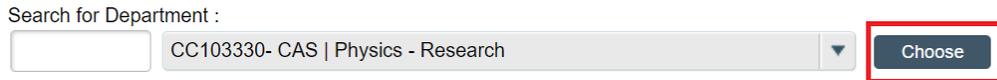


2. Select the cost center that has the project statement(s) that you want to add a designee for from the dropdown list. Click “Choose”

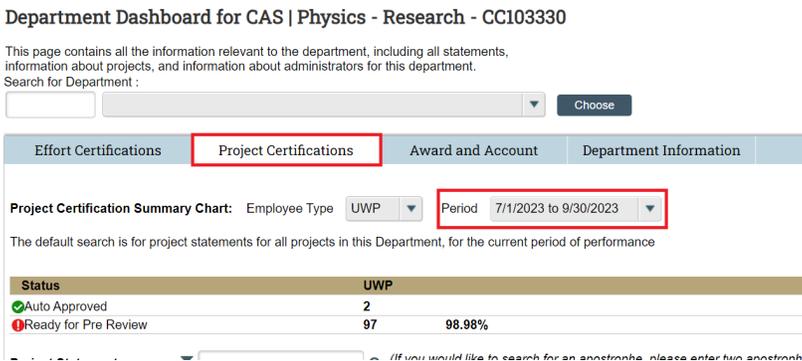
### Department Dashboard



### Department Dashboard



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



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

Chart: Employee Type **UWP**    Period **7/1/2023 to 9/30/2023**

statements for all projects in this Department, for the current period of performance

UWP		
2		
97		98.98%

(If you would like to search for an apostrophe, please enter two apostrophes to return results)

Project Number	Grant Manager	PI	PI Department	Statements	Action
CC103330	Parks, David	+	N/A	✓	
	Parks, David	+	N/A	✓	
GRXXXXXX	Parks, David	+	CAS   Physics - Academics	!	
GR XXXXX1	Parks, David	+	CAS   Physics - Academics	!	
GR XXXXX2	Parks, David	+	CAS   Physics - Academics	!	
GR XXXXX3	Parks, David	+	CAS   Physics - Academics	!	
GR XXXXX4	Parks, David	+	CAS   Physics - Academics	!	

- From the “Account Summary” page that opens, select the “Manage Account Designee” subtab

Account Summary

Account Name: Example    Associated Department(s): CAS | Physics - Center for Nuclear Particle and Astrophysics

Account Nickname: Example    Award Name:

Account Number: GR XXXXXX    Start to End Date: 06/01/2023 to 05/31/2024

Account PI: PI (Primary Effort)    Account Manager: Austin Bates

show more >>

Project Statements    Covered Individuals    **Manage Account Designee**

Associated Project Statements

Period	Project Certification Status
2023 - 10/1 to 12/31	Building
2023 - 7/1 to 9/30	Ready for Pre Review

- 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

Select Effective Start and End Dates **Hart Justin A**

Nothing found to display.

- Enter effective start and end dates.
  - 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.
  - 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:

Select Effective Start and End Dates:

Nothing found to display.

**Current Account Designee**

Nothing found to display.

- 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 Designee				
Designee Name	Effective Start Date	Effective End Date	Action	Delete Designee
Justin A Hart	07/01/2023	07/31/2024	 	<input type="checkbox"/>

- 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](mailto:effortreporting@uw.edu)