

ECRT Request Guide for Effort Coordinators

<u>Action Item</u>	<u>Request Method</u>	<u>Information to Include in Request</u>
Allow a person to certify for themselves	Send an email to effort@rsp.wisc.edu	Justification on suitable means, certifier's name, emplID
Allow a faculty member to certify for someone else	Send an email to effort@rsp.wisc.edu	Justification on suitable means, certifier's name, emplID. Faculty member name, emplID
Assign/change primary EC or backup EC's in a dept	Send an email to your Dean's office, ask that they review and if they approve, to send an email to effort@rsp.wisc.edu	What the new EC's role should be and what should happen to the former EC
Assign a PI to certify effort for someone who left UW	Send an email to effort@rsp.wisc.edu	Certifier's name, emplID, when their UW appt ended. PI name, emplID. Method on how you want to get effort certified for the person who left UW
Commitment update	Fill out form at https://www.rsp.wisc.edu/forms/costshareCommitment_update/index.cfm and send to effort@rsp.wisc.edu	Completed form
Cost Share update	Fill out form at https://www.rsp.wisc.edu/forms/costshareCommitment_update/index.cfm and send to costshare@rsp.wisc.edu	Completed form
Designee request	Fill out form http://www.rsp.wisc.edu/effort/piDelegationFormOct2007.pdf And send to effort@rsp.wisc.edu	Completed form
Ignore HR's listing for primary dept and put a certifier in another existing HR dept/appt	Send an email to effort@rsp.wisc.edu	Justification to ignore HR. Proof that both EC's agree to the new obligations. Certifier's name, emplID and what dept should be primary in ECRT.

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Ignore HRs listing for primary dept and put a certifier in a newly created dept/appt in ECRT	Send an email to your Dean's office, ask that they review and if they approve, to send an email to effort@rsp.wisc.edu	Justification to ignore HR. Certifier's name, emplID and what dept should be primary in ECRT.
Manual certification via paper	Review certification, add cover letter http://www.rsp.wisc.edu/effort/manualCertCoverSheet.pdf and send to effort@rsp.wisc.edu	Completed certification and cover letter
Primary EC override (allow someone else to process a statement for a certifier in your dept)	Send an email to your Dean's office, ask that they review and if they approve, to send an email to effort@rsp.wisc.edu	Justification on why someone else should be allowed to process the certifier's statement. Proof that both EC's agree to the new obligations. Certifier's name, emplID and who the override EC should be.
Put someone's card on hold	Send an email to effort@rsp.wisc.edu	Justification on why the statement needs to be on hold. Certifier's name, emplID and who the override EC should be.
Re-activate a user	Send email to effort@rsp.wisc.edu	Certifier's name and emplID
Reopen an auto approved card	Send email to effort@rsp.wisc.edu	Certifier's name/emplID, the date/statement to be opened.
Reopen after a cert window closes	Send an email to your Dean's office asking they review your request. If approved, they should forward the letter to: reopeneffort@rsp.wisc.edu	Justification for reopen, certifier's name, Empl ID, statement(s) to be opened & steps being taken to avoid similar requests in the future
Reopen during certification window	EC's can do this by going to the individuals effort certification page > clicking the "Historical" statements list in preview window > select the appropriate statement > click the "Reopen" button.	Add notes as to why you are opening the card.