UNIVERSITY OF PITTSBURGH
OFFICE OF FINANCIAL COMPLIANCE FOR RESEARCH
Request to Create/Delete Effort Coordinator and/or Other ecrt Roles

Effort Coordinators (EC) are responsible for the pre-review of all employee effort statements associated to their department(s) prior to the release of these statements to the Principle Investigators (PI) for certification. When necessary, the EC may place effort statements on hold to process any modifications affecting those statements through the SPAR application. EC’s monitor the completion of certifications and follow up with PI’s as necessary to resolve issues and complete the certification process. A variety of management reports are available to the EC at the employee, award and project levels. EC’s are not able to certify effort statements.

Effort Coordinator Roles:

- Lead Effort Coordinator - Has access to employee salary information in ecrt and can assign and manage Restricted Access Effort Coordinator rights.

- Secondary Effort Coordinator – Cannot access employee salary information in ecrt or assign/manage Restricted Access Effort Coordinator rights.

Primary Effort Coordinator Rights:
Primary Effort Coordinator (PEC) is a designation given to an existing Lead or Secondary Effort Coordinator which identifies this EC as the recipient of all email notifications and tasks from ecrt. Only one PEC will be designated for each department. The rights of the PEC may be assigned to any EC role (Lead or Secondary) and may be transferred to another EC in the department via the Department Dashboard, without Central Administration intervention. Changes to or from the PEC position will not change the user’s access, rights or restrictions as dictated by their Lead vs. Secondary EC status, only the receipt of emails related to tasks.

Restricted Access Effort Coordinator:
Restricted Access Effort Coordinator functionality enables the department to limit the employees to whom an Effort Coordinator has access, similar to a SPAR subset. Central Administration can create a Restricted Access EC role when the requestor indicates ‘Yes’ next to the name and employee number in the Secondary Effort Coordinator section on page 2 of this form.

It is the responsibility of the department to identify and assign access to the specific employees for which the Restricted Access EC will be responsible. Restricted access may be assigned and managed by any Lead Effort Coordinator in the department. Central Administration will create the Restricted Access EC role but this EC will have no access to any employee until a Lead EC assigns specific employees to that Restricted Access EC. Employees assigned to the Restricted Access EC will still be accessible by all other EC’s in that department.
Effort Coordinator Request

RC/Department Number ______________________

Please create/delete the following Effort Coordinator roles:

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<thead>
<tr>
<th>Lead Effort Coordinator</th>
<th>Create/Delete</th>
<th>Secondary Effort Coordinator</th>
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________________________________________________________________________________

I authorize the assignment of Effort Coordinator Roles as indicated on this request.

________________________________________________________________________________

Signature – RC Administrator                                              Date

________________________________________________________________________________

Printed Name                                                             Title

Administrative Contact Information (To be completed as changes occur)

In compliance with the University’s Effort Reporting Policy, Deans and Chair personnel will be notified of delinquent effort statement certifications. Please provide the names and email addresses for the Dean and Chair for your School/Department.

________________________________________________________________________________

Dean Name                                                               Email Address

________________________________________________________________________________

Chair Name                                                             Email Address
Executive Administrator Role Request

RC/Department Number _________________

The Executive Administrator is similar to the Dean and Chair role in that all are View only access for the RC/Department with access to specific standard reports. The Executive Administrator will not receive the past due certification email notices sent to the Chair and Dean roles. This role is intended for use by senior level administrators for organizational reporting and monitoring of the progress of certifications within the RC/Department. RC’s/Departments are not required to have an Executive Administrator assigned, nor is there a limit to the number of Executive Administrators allowed per RC/Department.

Please create/delete the following Executive Administrator roles:

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<th>Name</th>
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I authorize the assignment of Executive Administrator roles as indicated on this request.

____________________________________ ______________________
Signature – RC Administrator Date

________________________________________
Printed Name
________________________________________
Title
Other ecrt Role Request

The following roles are restricted to employees in the University’s Central Administration area:

Central Administrator – Global access to view and/or modify all effort statements, system settings, user roles and rights and user access. This role is restricted to employees of the Financial Compliance for Research department and the Senior Vice Chancellor for Health Sciences.

Auditor – View only role that allows members of the University’s Internal Audit staff access to employee effort statements, certification statistics, and various management/monitoring reports. This role may be assigned to external auditors upon request.

R/CA Cost Share View Only – This role allows members of the Research/Cost Accounting staff to generate detailed cost share reports for use in the analysis of F&A rates.

Please create/delete the following ecrt roles:

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I authorize the assignment of ecrt roles as indicated on this request.

____________________________________  __________________________
Signature – Department Director               Date

__________________________________________
Printed Name                                Title