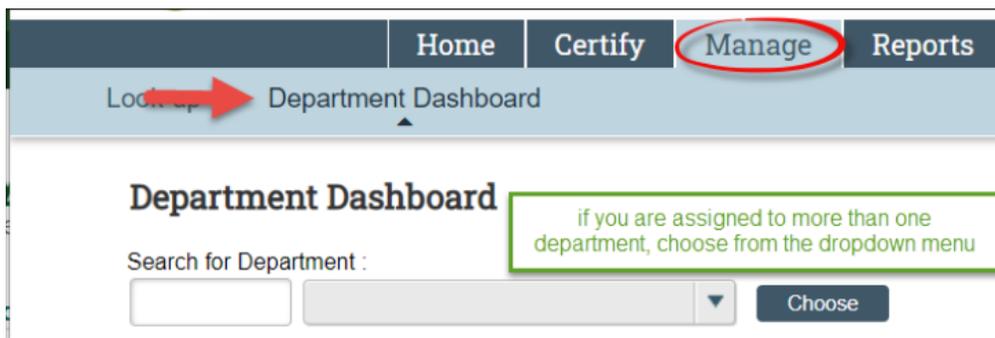# 'Manage Assignments' Instructions

> **Purpose:** These instructions should be used for making Principal Investigator (PI)-based Effort Coordinator reassignments in ecrt. For making or changing assignments based on project (53 account), refer to the 'Grant Manager Override' instructions.
>
> **Please note:** The Effort Coordinator role in ecrt is <u>separately maintained</u> from the Fiscal Officer and Account Manager roles in KFS.

By default, the Primary Effort Coordinator (PEC) is assigned as the Grant Manager (Effort Coordinator) for all projects under their department. If a Secondary Effort Coordinator needs to manage certain projects within the department, PI-based reassignments can be processed directly in the system by the department using the **Manage Assignments** option. *Note: Department Effort Coordinator reassignments made in ecrt are not monitored by OSP and are the department's responsibility to update/maintain as individuals join or leave the department and internal PI distributions change.*

You can access the **Manage Assignments** option by navigating to the Department Dashboard and clicking on the "Department Information" tab.

From the "Department Information" tab, click the **Manage Assignments** (pad w/ pencil) icon under the Action column for any of the existing Department Effort Coordinators. If the individual you're looking for is new or not listed, please reach out to OSP at vpr_ecrt_support@mail.colostate.edu to make sure they've been assigned the Department Effort Coordinator role and are ready to be added to that department.

This will open the **Manage Assignments** box. The Department and Effort Coordinator you are managing assignments for will be listed at the top. The **Manage Effort Coordinator Assignments** section is used to make PI-based reassignments. The **Manage Restricted Access Effort Coordinators** section is **not** recommended as that will restrict the Effort Coordinator's ecrt access to only the PIs/Certifiers selected there and will prevent that Effort Coordinator from being able to view or access any other statements under the department in coverage situations. However, there may be instances where that option is appropriate based on the department's organizational structure/needs.

To assign a PI to the Effort Coordinator, scroll and select the PI's name from the "Unassigned PI/Certifier List" in the **Manage Effort Coordinator Assignments** section. Click the single right arrow (**>**) to move that PI to the "Assigned PI/Certifier List". Repeat as necessary for additional PIs and then click the "Save" button. *Note: The double arrows (>>) will move the entire "Unassigned PI/Certifier List" to the Effort Coordinator's assigned list and should be avoided in most instances.*

To remove a PI from the Effort Coordinator's list, scroll and select the PI's name from the "Assigned PI/Certifier List" in the **Manage Effort Coordinator Assignments** section. Click the single left arrow (**<**) to move that PI to the "Unassigned PI/Certifier List". Repeat as necessary for additional PIs and then click the "Save" button. *Note: The double arrows (**<<**) will remove the entire "Assigned PI/Certifier List" from the Effort Coordinator's assignments with one click so it should be used carefully. This is a good option when the DEC has left the department or no longer needs ecrt access.*

Once the PI-based reassignments have been saved, the Effort Coordinator should now be reflected as the Effort Coordinator (Grant Manager) on all projects belonging to their assigned PI(s). *Note: Any project-based 'Grant Manager Override' reassignments will override the PI-based reassignment made through this "Manage Assignments" option. A 'Grant Manager Override' reassignment can be identified by the red minus (-) icon next to the Effort Coordinator's name. The Grant Manager Override can be removed by clicking that red minus (-) icon.*