1. Create a Change Request
   - Upon logging into the InfoEd portal, create a change request by clicking Change Requests and then clicking Personnel - Effort Change for PI or Key Personnel from the Create New menu.
   (Note: If you do not see the option to create a Change Request, you may need to submit a security form.)

Learn more:
osr.northwestern.edu/resources/infoed
GETTING STARTED:
HOW TO REQUEST AN EFFORT CHANGE FOR
PRINCIPAL INVESTIGATOR [PI] OR KEY PERSONNEL

2. Complete the New Change Request Questionnaire
   - Step 1: Link the Change Request to a Sponsored Project by clicking Linked Proposal and selecting Add New
   - Step 2: After linking a proposal (i.e. the SP#) to your change request, the relevant questions will appear below
   - Step 3: Indicate or complete the following:

   Effort Change Summary
   General Questions

When to submit an effort change in InfoEd:
Only official effort changes which need to be tracked and which may or may not require sponsor approval are recorded in InfoEd

A minor change: (e.g. under the 25% threshold) or a temporary "net-zero effort shift" (e.g. a PI is reducing effort a tiny amount one quarter and making it up in the next quarter) is an allowable management decision that does not need to be tracked

The official commitment to the sponsor, however, should always be in InfoEd

Learn more:
osr.northwestern.edu/resources/infoed
### Effort Change Summary:
Use the Add New button to add projects

<table>
<thead>
<tr>
<th>Proposal or Subproject Number</th>
<th>Effort Changes (Enter in Person Months)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Use the Add New button within the projects to add person(s)

<table>
<thead>
<tr>
<th>Proposal or Subproject Number</th>
<th>Project A # or Char</th>
<th>Person Name</th>
<th>Budget Period</th>
<th>Original Calendar Effort</th>
<th>New Calendar Effort</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Willie Wildcat</td>
<td>2</td>
<td>2.00</td>
<td>1.50</td>
</tr>
</tbody>
</table>

- **Proposal or Subproject Number:**
  Clearly identify the project - enter the InfoEd Subproject Number or Chartstring

- **Person Name:**
  Clearly identify the person with the effort change by entering the first and last name

- **Budget Period:**
  Enter the period number (not dates) (e.g. 1 for the first year/budget period)

- **Entering Effort:**
  Enter annualized effort where appropriate.

  For example, if a person is changing effort from 2 calendar months (over an entire budget period) to 1.5 calendar months in that period, like Willie Wildcat in the example shown here, then enter 2.00 in the Original Effort Box and 1.50 in the New Calendar Effort box

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PRINCIPAL INVESTIGATOR [PI] OR KEY PERSONNEL

### General Questions:
- **Effective Date:**
  Start date that this new effort goes into effect

  *(Note: Indicate whether the effective date will impact the scope of work and, if needed, upload a revised scope of work)*

### Upload sponsor correspondence
If sponsor has provided approval for change, please upload

### Justification for Change

### Other Information & Uploads:
- **Additional information for OSR (optional):**

- **Additional Documents for OSR (optional):**

### 3. Save
- Click **Save** at any time to save your work and return to it later

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Learn more:
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