**Delegating Project Manager Approvals - eForms**

eForm project manager approval delegation is a control process in place to ensure that approvals for eForms for hires, job changes or status changes on behalf of the research project holder are appropriately managed in an efficient and timely manner without any disruption to workflow process.

The approver must exercise due diligence in assigning appropriate people as delegates (back up approvers) for eForm project approvals, communicate their expectations to them, and ensure they will be able to accept responsibility and are available to take actions in a timely manner.

**Definition**

**Approver:** Project holder/sponsor, Project Manager

**Delegate/Proxy**: a person temporarily assigned to act on behalf of the approver within the same project

**Responsibility**

The project sponsor is ultimately responsible to ensure:

* That delegate is a team member from within the same project
* The delegate has the appropriate knowledge and understanding of research work.
* The delegate is able to meet the requirements/terms and conditions of the sponsor and research budget.

**Process**

1. Delegation of Project Manager approvals is managed through the “PeopleSoft Human Capital Management (HCM) Research Delegation Access Request - eForms” form available on <https://ist.ualberta.ca/sites/default/files/Request_for_Project_Delegation_Assignment-eForms.doc>
2. The delegate must meet the below listed conditions:
   1. Accept responsibility as a sub-delegate for the research project(s) listed below in accordance with applicable University policies and procedures and Chapter 6 - Expenditure Approvals of the Guide to Financial Management.
   2. Have the appropriate knowledge necessary for the effective exercise of this authority.
   3. Will exercise due diligence in use of funds only for the purposes for which they were awarded.
   4. Ensures that all purchase requisitions are supported by appropriate documentation and conform to terms and conditions of the sponsor
3. In the absence of project manager, the eForm approval routing will follow the one over approver role.

**Delegation Management**

1. Project manager approval delegation is set up for a defined period (for example, if you are on vacation, leave etc.) and is not designed to allow permanent delegation of project approval responsibilities. eForm project manager approval delegations with no specified end date will continue to exist until the project is closed.

ii. Delegation requests are for the purposes of assigning the project approval authority to another member on the same research project team

iii. A delegate under a research project must have an association with and knowledge of the research project; therefore, an employee in an administrative support capacity would not be an appropriate delegate. Delegation of approval for research projects is limited to the following two options:

* Research team member or
* The Principal Investigator/Trust Holder

iv. Project manager approval delegation is set up for one project only. A project manager may have one or more projects and will require separate delegations set up for each of those projects.

v. A Person of Interest (POI) cannot be set-up as a delegate/proxy

***The researcher/project holder and delegate are responsible for the accountabilities associated with the research project(s).***