The Project Management Authorization form is used to:

Modify Key Member assignment for a project. There are three Key Member roles defined - Project Manager, Alternate Approver & Project Reviewer. Project Manager and Alternate Approver roles should be assigned to Exempt employees only.

- Project Manager (PM) - assumes the overall responsibility for a project. The PM acts as an approver and is responsible for verifying the legitimacy, appropriateness, and necessity of transactions recorded against the project. The active PM is responsible to submit the annual certifications for the entire period regardless of when the PM was assigned this role (refer to disclaimer note on form). The PM is also responsible for all assets assigned to the project.

- Alternate Approver (AA) - during the Project Manager's absence (or by request), the alternate approver acts as the approver on behalf of the PM, verifying the legitimacy, appropriateness, and necessity of transactions recorded against the project.

- Project Reviewer (PR) - is responsible for reviewing each transaction posted against the project, ensuring its accuracy and validating that sufficient source documentation exists (paper form or electronic data residing in PeopleSoft). The PR also reviews the non-standard transactions reflected on the GMS Custom Exception Approval screen. The transactions represent items which were not initially authorized (via workflow) by the Project Manager or Alternate Approver. Examples: postage charges, physical plant work orders, or other Inter-Departmental Transfers.

- Project Dean/Director (PDD) - assumes the responsibility to review the account reconciliations for the PM in case of an audit.

- Vice-President (VP) - assumes the responsibility for oversight of all Semi-Annual Certifications within their respective organizations.

NOTE: When applicable, complete and submit only one form per Project Manager (PM) - key member assignments are the same for all projects. Additional forms may be submitted if different personnel will be assigned as key members for certain projects.

Instructions

1. Requestor Information: Enter Name, Campus Telephone, Email Address, and Effective Date.
2. Project(s): List all the projects to which changes to Key Member assignments are being requested. Attach a list of projects if more space is needed.

Key Member Section:

3. Current Project Manager must add Employee ID, print and sign their name to authorize the change(s).
4. For each new designee added to the project, make sure to provide the Employee ID and Full name in the designated role line. Ensure that the designee signs the form as no changes will be made without the signature.
   4.A. Updates to Project Manager role must be approved by the project's Funding Agency. Email request to OSP (sponpro@utrgv.edu) so that approval request can be submitted.
5. Reason for Change: Specify the reason for the change in Key Member(s).
6. Disclaimer for New Project Manager and Outgoing Project Manager: applies to both the New Project Manager and the Outgoing Project Manager. A signature from both parties is required and signifies compliance.
7. Route completed form to GrantsAccounting@utrgv.edu. If updating the Project Manager role, ensure that OSP obtains approval before submitting the form to Grants Accounting.

   Note: Incomplete or unapproved forms will be returned to the requestor.

Name of Requestor: _____   Campus Telephone: _____

Email Address: _____   Effective Date: _____

Project(s): _____

_____

_____

* Terms and Conditions

Annual Certification Disclaimer:
PROCEDURE: The project manager assigned to a project at the end of each annual certification period is held responsible for submitting the project certification for that period regardless of when the PM assumed this role. The annual certification entails (to the best of the PM's knowledge and belief) that ALL transactions posted to the project comply with fund restrictions as well as applicable regulations and laws.

ACTION: It is the new Project Manager's responsibility to obtain a partial off-line certification (in writing) from the outgoing Project Manager, covering transactions within the certification period. If the PM has changed numerous times during the FY, the outgoing PM should have a certification on file from the previous outgoing PM. Obtain copies of those partial certifications as well. These partial certifications will be used by the new PM as justification to support his/her annual project certification.

Purchasing Disclaimer: I (we) understand that improper use of orders of less than $5k (Small Purchase Orders - SPO) through the e-commerce system (iShop) may result in my (our) personal liability for unauthorized transactions or the termination of SPO privileges. I (we) agree to accept responsibility for the proper use of SPO's. I (we) agree to comply with **Handbook of Operating Procedures, Section 8.2.3**, Purchasing Department guidelines, Purchasing Ethics, UT System employee ethics and standards of conduct, and any other requirements as determined by the Director of Material Management. I (we) understand I (we) and any support staff that will create SPO's for our project must attend training before access to SPO's is granted. ***SPO Training** is required to approve purchases or transactions through iShop. Questions regarding iShop or SPO Training can be sent to *iShop@utrgv.edu*.

Asset Management Disclaimer: As Project Manager, I understand that by signing this form I accept responsibility for assets under this (these) Sponsored Project(s) to use property only for state purposes and to exercise reasonable care for its safekeeping in accordance with **Handbook of Operating Procedures, Policy Number: ADM 07-305**. I also understand that I am under financial liability for loss or damage to this (these) item(s) if the loss or damage results from my negligence, intentional act or failure to exercise reasonable care to safeguard, maintain and service it (them).

By signing the form, the outgoing Project Manager, New Project Manager, and Alternate Approver agree to the terms and conditions above.

	Employee ID #	**Print Full Name (First, Middle, Last)**	**Signature**
Current Project Manager*	_____	_____	_____
New Project Manager*	_____	_____	_____
Current Alternate Approver	_____	_____	_____
New Alternate Approver	_____	_____	_____
Current Project Reviewer	_____	_____	_____
New Project Reviewer	_____	_____	_____
New Project Dean/Director	_____	_____	_____
New Vice-President	_____	_____	_____

Reason for Change:
_____

Project Manager Role Approval Process

Funding Agency Approval Date:_____

Route Form to Grants Accounting at GrantsAccounting@utrgv.edu

REV. 01/05/2022

[Print Form]