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 semi-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 Oracle). 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.

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 Date Required.
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 print name and sign the form in order to authorize the change(s).
4. Print the name of the new Project Manager, Alternate Approver, Project Reviewer, and Project Dean/Director in the space indicated (where applicable) and obtain the signature(s) of the new assignee(s). The change will NOT become effective if a signature is missing.

   Note: Existing Purchasing Responsibilities will be disabled if this request results in a change in Project Manager.

   A responsibility is a level of authority in Oracle E-Business Suite. It enables access to those functions and information appropriate to each role. An End User may be assigned more than one responsibility.

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. Signature from both parties is required and signifies compliance.
7. Route completed form to AccountingandReporting@utrgv.edu.

Note: Incomplete forms will be returned to requestor.

Name of Requestor: _____   Campus Telephone: _____

Email Address: _____   Date Required: _____

Project(s): _____

_____

_____

Terms and Conditions

Semi Annual Certification Disclaimer:
PROCEDURE: The project manager assigned to a project at the end of each semi-annual certification period is held responsible for submitting the project certification for that period regardless of when the PM assumed this role. The semi-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 semi-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) account(s) to use property only for state purposes and to exercise reasonable care for its safekeeping in accordance with **Handbook of Operating Procedures, Section 8.1.1**. 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.

	SPO Training	Print Full Name (First, Middle, Last)	Signature
Current Project Manager*	_____	_____	_____
New Project Manager*	_____	_____	_____
New Alternate Approver	_____	_____	_____
New Project Reviewer		_____	_____
New Project Dean/Director		_____	

Reason for Change

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Route Form to Finance and Public Policy at AccountingandReporting@utrgv.edu

BUSINESS ANALYST USE ONLY

Notify the following department(s) when Project Manager or Alternate Approver changes

☐ Fixed Assets   ☐ Position Control   ☐ Purchasing

REV. 06/03/2016