

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 Reconciler.

- * 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 their name.
- * 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 Reconciler (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. 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 Reconciler, 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 PeopleSoft. 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. Email completed form to **Assets Management** (assetsmanagement@utrgv.edu)

Note: Incomplete forms will be returned to requestor.



THE UNIVERSITY OF TEXAS RIO GRANDE VALLEY
Plant Key Member Update

Name of Requestor, Email Address, Project(s), Campus Telephone, Date Required

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.

ACTION: Certifications must be completed on an annual basis. In the event of a Project Manager change, the incoming manager shall be granted access to all previously completed reconciliations, which are maintained in a departmental folder accessible to all designated key members.

Purchasing Disclaimer: I (we) understand that improper use of orders of less than \$15K (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.

Asset Management Disclaimer: As Project Manager, I understand that by signing this form I accept responsibility for assets under my name to use property only for state purposes and to exercise reasonable care for its safekeeping 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.

Print Full Name and EID

SIGNATURE

Current Project Manager*, New Project Manager*, New Alternate Approver, New Project Reconciler, New Project Dean/Director

Reason for Change

Large empty box for Reason for Change

Email completed form to Assets Management (assetsmanagement@utrgv.edu)