Process for Obtaining Signatory Authority on a Research Grant

Signatory authority means that a person is authorized to approve expenditures on an extramurally-funded project. To receive signatory authority, you must complete all four steps outlined in this document.

Registration for all of the required courses in Step 1 is through the Enterprise Learning Management (ELM) system. Instructions for self-enrollment of courses in ELM are at the end of this document.

STEP 1: Complete these four PeopleSoft Finance and Supply Chain (PSFSCM) online modules in the Enterprise Learning Management (ELM) system.

- **FSCM Fundamentals and Navigation** (Course Code: PSFSCM NAV)
  Basic concepts, terminology, and navigation techniques for PeopleSoft FSCM; prerequisite for all other FSCM classes.
- **FSCM e-RFP Online Request for Payment** (Course Code: PSFSCM e-RFP)
  Process for requesting payments and reimbursements in PeopleSoft Financials
- **FSCM e-Pro Requisition** (Course Code: FSCM e-Pro Req)
  ePro requisition process from creating to managing purchase requisitions
- **FSCM e-Pro Requisition Approval** (Course Code: FSCM e-Pro Req Approv)
  ePro requisition approval process and how to delegate approval responsibilities.

These classes do not have to be taken prior to taking the Financial Research Compliance classes in Step 2.

STEP 2: Complete the appropriate Financial Research Compliance course for your role.

- **FSCM Faculty Financial Research Compliance**
  (ELM Course Code: FSCM Faculty Fin Research Comp)
  - An overview of financial regulations as they apply to research and research funding. Provides information on the legal importance of financial compliance, regulations and policies, F&A, award management, cost transfers, cost sharing, effort certification and conflict of interest.
  - This online class is only required for faculty and will take approximate 45 minutes to complete. Please enroll for the class in ELM using the course code listed above.

- **Financial Research Compliance Program for Staff**
  (HealthStream Course Code: WFBHS-CTSI Financial Research Compliance Program for Staff)
  - An overview of financial regulations as they apply to research and research funding. Provides information on the legal importance of financial compliance, the anatomy of chartfields, expense account codes, F&A, property control/equipment, regulations and award guidelines, cost transfers, effort certification, cost sharing, close-out, transfers, and unobligated balances.
  - This online program is only required for staff and will take approximately 90 minutes to complete. Please enroll for the program in HealthStream using the course code listed above.

STEP 3: Once all required courses are completed, submit Help Desk ticket through Service Now or call 6-4357.

- Login to the Service Now portal https://wakehealth.service-now.com/sp. Click on Service Catalog and then click on “Request PeopleSoft HR, Financials, or ELM Access.” Fill out this form for the individual who has completed all required training.

- So that the Help Desk can verify completion of the required courses and grant access, please attach a screen capture of your certificate of completion from the Financial Research Compliance Program for Staff that can be found in HealthStream under Completed.

STEP 4: The Departmental Business Administrator, Research Administrator, or other designated staff must add the individual as an authorized approver in the PeopleSoft Financials system for the designated 710-770 fund segment of the chartfield. The PI should already be in the system.

- Log into PeopleSoft Financials and go to: Main Menu > Grants > Awards > Project
  - Business Unit = WFBMC
  - Project = enter six digit project number
  - Click Search
- Click the PROJECT TEAM link at the bottom of the page
- Click the plus sign on the right side of the page to add a new Project Team Member
- Search for the Employee ID and assign the individual a Project Role and Workflow Role
- Click ADD MEMBER TO ACTIVITY TEAM
- Click SAVE
- Click the TEAM tab at the top of the page to confirm the listing of Project Team Members

Self-enrollment for Courses in the Enterprise Learning Management System

1. Log into ELM with your Medical Center ID and password https://psappprd1.is.wfubmc.edu:8032/psp/lmpro/?cmd=login
2. In the blue banner at the top, enter course code or class code in the search box and press enter.
3. Find the Course and Class Date for the desired course.
4. For online courses, click on ENROLL. For in-person courses, choose the desired session, then click on ENROLL.
5. Now click SUBMIT ENROLLMENT. You must click this to be enrolled in the course!
6. You will receive an automated email within 24 hours indicating you are enrolled in the course.

If you have problems with ELM, please contact the Information Technology Services Help Desk.

Self-enrollment for Courses in HealthStream

1. Log into HealthStream with your Medical Center ID and password https://www.healthstream.com/HLC/wakehealth
2. Click on Catalog in the horizontal menu across the top.
3. Enter the course code in the search box and press enter.
4. Click on the desired course name from the list of search results.
5. To enroll, click on the green Enroll button. That will add the course to your To Do list in HealthStream.

If you have problems with HealthStream, please contact HealthStreamSupport@wakehealth.edu.