Process for Obtaining Signatory Authority on a Research Grant

NOTE: This process replaces the former Signature Authorization Form

Signatory authority means that a person is authorized to approve expenditures on an extramurally-funded project. Before this can be granted, these are the steps that must be completed.

Registration for all of these courses 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.

STEP 2: Complete the appropriate Financial Research Compliance course.

- **FSCM Faculty Financial Research Compliance – Faculty**
  (Course Code: FSCM Faculty Fin Research Comp)
  An overview of financial regulations as they apply to research and research funding. This online course is only required for faculty. This course will take approximate 45 minutes to complete.
- **FSCM Faculty Financial Research Compliance – Non-Faculty**
  (Course Code: FSCM Staff Fin Res Compliance)
  An overview of financial regulations as they apply to research and research funding. Provides information on the anatomy of chartfields, expense account codes, F&A, property control/equipment, regulations and award guidelines, cost transfers, effort certification and cost sharing, close-out, and unobligated balances. This in-person course is only required for non-faculty.

  This is a 3 hour, in-person class that is scheduled quarterly. Information about course, schedule and registration link can be found at: https://ctsi.wakehealth.edu/education-and-training/cid/95

  Please allow two business days from class completion for CTSI staff to change the status of those who attended the non-faculty class from ENROLLED to COMPLETED before proceeding to Step 3.

STEP 3: Once all required courses are completed, submit a remedy ticket to the HELP DESK (6-4357)

- Request approval for PS Financial Security Access for the individual who has completed all required training.
- HELP Desk will route the request to the PeopleSoft HRIS staff who will verify completion of the required courses and grant the approval.

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 provided above 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.