![McMaster University | HEALTH SCIENCES Research Finance]

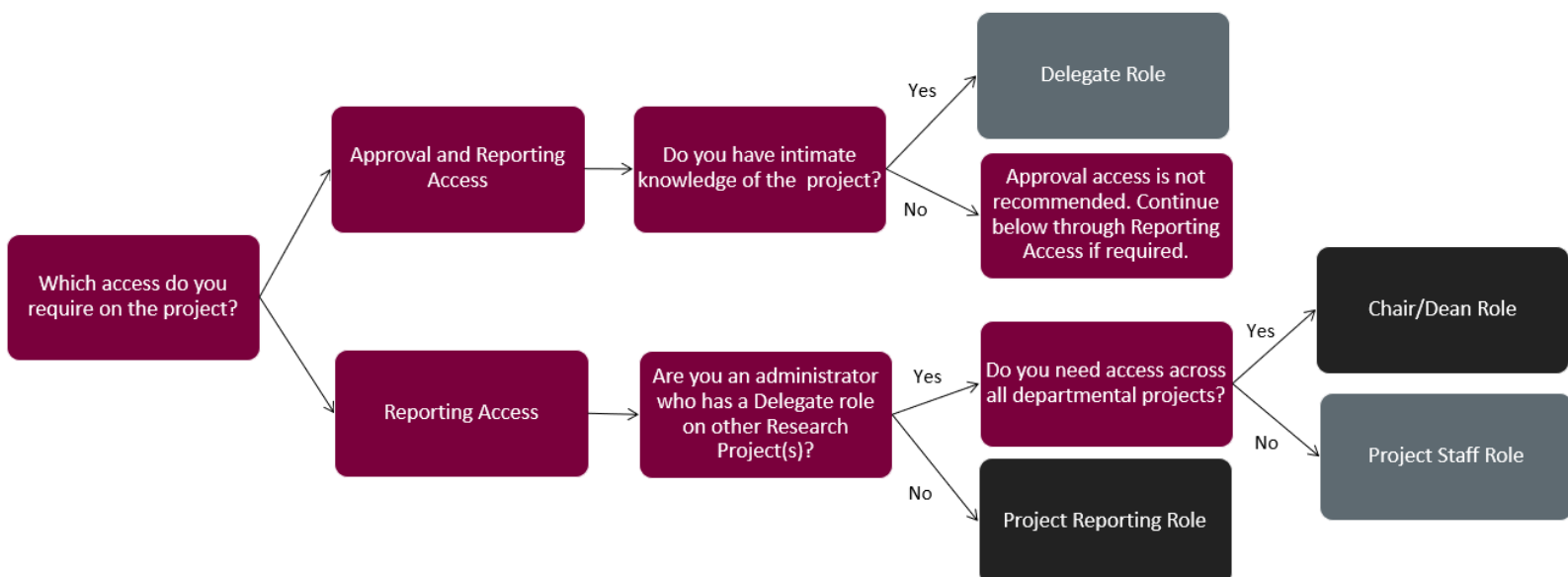# Research Finance Project Team Form

Purpose: The purpose of this form is to add and/or remove individuals from the Research Project Teams. The decision tree should be reviewed prior to completing the form. Additional detailed information is provided in Appendix 1 and Appendix 2.

Submission: Submit the signed PDF Project Team Form to the FHS Research Finance Office: hsresfin@mcmaster.ca.

Notes:

- This delegation of authority does not absolve the grant holder/Principal Investigator of their responsibility to ensure that all transactions recorded to their research projects are appropriate. All transactions can be reviewed in the Research Project Statement. The project holder's accountabilities can be reviewed in the HRS Account Request Form, Meaning of Signatures.
- Individuals being added to the Project Team need must be McMaster employees. For non-McMaster employees, a Person of Interest (POI) form must be submitted to UTS. Please consult your department for guidance.
- For mass entries (10 changes or more), please reach out to the FHS Research Finance Office (hsresfin@mcmaster.ca) to utilize an excel template for efficiency.

Decision Tree: The following decision tree will aid individuals in determining which type of access should be requested. The chart in Appendix 1 will provide the steps required to gain access to each specific role.

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Research Project Team Form (*Mandatory Fields)

NAME AND POSITION TITLE	EMPLOYEE ID #	PROJECT NUMBER(S)	SIGNATURE	Role (Please select only one)	Is access required for Labour Reports?
				☐ Delegate (Approvals and Reporting) ☐ Project Staff (Reporting) ☐ Scientific Store Purchases (Students), End Date: _____ ☐ Remove Access	☐ Yes ☐ No
				☐ Delegate (Approvals and Reporting) ☐ Project Staff (Reporting) ☐ Scientific Store Purchases (Students), End Date: _____ ☐ Remove Access	☐ Yes ☐ No
				☐ Delegate (Approvals and Reporting) ☐ Project Staff (Reporting) ☐ Scientific Store Purchases (Students), End Date: _____ ☐ Remove Access	☐ Yes ☐ No
				☐ Delegate (Approvals and Reporting) ☐ Project Staff (Reporting) ☐ Scientific Store Purchases (Students), End Date: _____ ☐ Remove Access	☐ Yes ☐ No
				☐ Delegate (Approvals and Reporting) ☐ Project Staff (Reporting) ☐ Scientific Store Purchases (Students), End Date: _____ ☐ Remove Access	☐ Yes ☐ No

* Please select who should have the Project Manager role for Journal Entry approvals:

    No update, Project Manager already in place

    Principal Investigator (default)

    A Delegate, Name:

* **Principal Investigator Signature:**

* **Principal Investigator Name (print):**

* **Date:**

Appendix 1: Role Descriptions

Role descriptions and path to obtain access: The following chart provides a detailed description of each role and the path to obtain each access.

Role Name:	Description:	Access Granted By:
Delegate *	The Delegate has intimate knowledge of the research project and can determine the relevance of transactions as they relate to the respective research project. The Delegate has knowledge of the granting agency regulations and/or terms of the contract agreement and has been advised of the approved budget, the terms of reference and the general policies and procedures of the University. Generally, a Delegate should not be a departmental central administrator (Example: Department Financial Manager or Department Financial Coordinator). The Delegate has access to approve vouchers, travel & expense claims, and requisitions on the same level as PI. There can be multiple Delegates on a project. The Principal Investigator and all the Delegates will be part of the Workflow as a pool of approvers. Only one approver in the pool needs to approve a transaction. This role provides reporting access to BI Research Project Statement and Principal Investigator Dashboard (access is specific to the projects the Delegate has been assigned to).	Submission of the **Project Team Form to the Research Finance Office**.
Scientific Stores - Students	Signing authority for students on Research Project(s) for purchases from the Scientific Stores. An end date must be provided to end the delegation for the student.	Submission of the **Project Team Form to the Research Finance Office**.
Project Staff *	The Project Staff role provides viewing access in Mosaic and BI. Research Project Statement & Principal Investigator Dashboard access is specific to the projects the Project Staff has been assigned to.	Submission of the **Project Team Form to the Research Finance Office**.
Project Manager	The Project Manager role has access to approve Journal Entries. There can only be one Project Manager per project. The Project Manager role can be assigned to a Delegate. If no Delegate is assigned, this role will be defaulted to the Principal	Submission of the **Project Team Form**

	Investigator. The Principal Investigator will not be part of the Workflow process for JEs if a Delegate is assigned to the Project Manager role.	**to the Research Finance Office**.
Labour Distribution Access	Reporting and Approval roles can be provided access to see Labour Distribution reports for Research Project(s). This access will provide them information on all individuals paid from the research projects and the amount per pay period. This access should be requested if the individual will be completing Journal Entries for salary re-allocations.	Submission of the **Project Team Form to the Research Finance Office**.
Project Reporting	Access to view all projects in BI Research Project Statement & Principal Investigator Dashboards. The individual is not a PI or a Delegate for any project.	Request is made from the department level to **via Online Form.**
Chair/Dean	Access to view all projects in BI Research Project Statement & Principal Investigator Dashboards. This security role is reserved for individuals who need access to all projects and are a PI or Delegate for at least 1 project. Additionally, this role should be reserved for central department roles such as Chairs and Deans who would need oversight for multiple PI's.	Request is made from the department level to **via Online Form.**

* Please note: The Delegate and Project Staff role will automatically amend an individual's security role that will restrict their access to only view projects for which they are a project Delegate or Project Staff. If this limitation is too restrictive then please discuss other options with the Department or the Research Finance Office.

Appendix 2: Comparison Chart

Comparison Chart: Once the applicable role is determined by the decision tree, the following comparison chart indicates the access for each role.

Role	Approval Access			Reporting Access	
	Scientific Store Purchases	**Mosaic Finance Expenses**	**Mosaic Journal Entries**	**By Project**	**All Projects**
Principal Investigator	X	X		X	
Delegate	X	X		X	
Scientific Stores (Students Only)	X				
Project Staff				X	
Project Manager (In addition to PI or Delegate role)	X	X	X	X	

Additional Roles:

Role					
Project Reporting Role					X
Chair/Dean Role					X

Questions? If the department has any questions after the reviewing the following documentation, please direct inquires to the Research Finance Office: hsresfin@mcmaster.ca.

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