

All researchers holding grants or awards from the federal agencies (NSERC, CIHR, SSHRC, CRC's and any NCE's) are required to authorize all expenditures that are applied to their respective research accounts and provide supporting evidence of such when required. This is especially important for those orders from our preferred vendors/supply contracts and on campus operations (Bookstore, UMS, Chemistry Stores, Computer Store, etc.) where speedcodes are accepted. It is also important that you and other department staff have sign off from the researchers (emails are acceptable) for any SAN's, purchase orders or journals applied to their research accounts (funded by the federal agencies).

Alternatively, the researchers may delegate their signing authority to those individuals who process or apply charges to their accounts on a regular basis. At present we are aware that this delegation is not well documented. Although all Admin Officers have delegated signing authority from their dept Chairs, the Tri-Councils require that each researcher delegate their signing authority where applicable.

From the Tri-Council Financial Administration Guide:

"Grants are awarded to eligible researchers and are administered through the institution's administration systems. The grantee authorizes expenditures in accordance with Agency policies and requirements, as outlined in the relevant Agency guide on its Web site, or as stated as a condition of a grant, and with institution policies. No one may initiate or authorize expenditures from a grant account without the grantee's delegated authority".

With the implementation of the PeopleSoft Grants Module (ROLA II) we now have the mechanism for on-line delegation of signing authority. This allows researchers to extend access to selected individuals, allowing them to either view or process transactions for all or a selected few of his/her research accounts. Those individuals who are generating purchase orders, journal entries, salary appointment notices, or other financial transactions on a regular basis should have delegated signing authority unless they are receiving and retaining the researcher's approval for each individual transaction.

Please assist us in forwarding this notice to all your researchers who hold NSERC, CIHR, SSHRC, CRC's or NCE awards. I realize that many staff and faculty are very busy with the start of the new academic year and with grant applications. Please have any updates or changes to delegation of signing authority completed by the end of September. Researchers should follow the attached instructions for delegating their signing authority within the PeopleSoft system.

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