

University of Waterloo – Office of Research

Delegation of Signing Authority & Reporting Access for Research Work Orders (Fund 105 only)

This form does not need to be completed for hierarchical changes (e.g. the appointment of a new Chair or Director).

Supplementary information can be attached to the form if needed (e.g. if adding one delegate to a list of work orders) and must indicate the signing authority & reporting access being provided and be signed by the PI.

Principal Investigator (PI) Name:

PI Department:

To be completed by PI: I authorize the following changes to the research work order below, for which I am the PI.

Signature of PI:

Date:

				-	5										-						
Org Unit					Work Order																

If adding Unit4 Workflow Delegates and/or Signing Authorities: I confirm that these individuals are appropriate delegates under the provision of the [Guideline on Signing Authority on Research Accounts](#) and that the delegation has not been granted solely for administrative convenience.

Remove/Add	Name	Effective Date ¹	Access Level ^{2,3}
			Unit4 & Non-Unit4 Signing Authority, Reporting Access with HR Details Non-Unit4 Signing Authority, Reporting Access with HR Details
			Unit4 & Non-Unit4 Signing Authority, Reporting Access with HR Details Non-Unit4 Signing Authority, Reporting Access with HR Details
			Unit4 & Non-Unit4 Signing Authority, Reporting Access with HR Details Non-Unit4 Signing Authority, Reporting Access with HR Details
			Unit4 & Non-Unit4 Signing Authority, Reporting Access with HR Details Non-Unit4 Signing Authority, Reporting Access with HR Details

If any staff member(s) above have hierarchical reporting access please list their name here:

¹ All access levels will remain in place until the end of the Work Order unless an end date is indicated on this or a subsequent form.

² The Unit4 Signing Authority (i.e. Workflow Delegate) will authorize all transactions in Unit4 which are less than \$20,000 CAD. There can be only one such individual for each work order. If the Unit4 Signing Authority is not setup, this role will default to the PI. Unit4 Signing Authorities are also Signing Authorities for transactions outside of Unit4 (e.g. Concur, Payroll etc.).

Both Unit4 and Non-Unit4 Signing Authorities will receive Reporting Access with HR details unless the 'Do not provide HR Details' box is ticked.

³ If reporting access has already been given at the hierarchical level it will not be set up at the work order level.

Please email the completed form to - or.complianceteam@uwaterloo.ca and copy your Faculty Finance Officer.