R1. A Fund Financial Manager (FFM) or Principal Investigator (PI) is responsible for approving all financial transactions on their fund(s)/grant(s). During temporary absences, they may elect a delegate for this approval – in these cases, signing authority is being delegated. The delegate must approve all travel advances, expense reports and payment requests charged to these fund(s). The delegate must be an employee possessing the necessary skills and knowledge for the effective exercise of signing authority. For the purposes of this Regulation, "employee" collectively refers to academics, researchers, and administrative staff.

R2. Signing a document signifies that the Approver (FFM/PI or their delegate) has assessed whether it:

- Meets the objectives of the fund(s) charged.
- Is legitimate, reasonable and an appropriate use of funds.
- Adheres to policies and guidelines.
- Complies with any restrictions imposed by external funding sources.
R3. Tri-Agency grants (NSERC, CIHR, SSHRC, CRC)

R3.1. Delegates may not be implemented for “administrative convenience”.

R3.2. Delegates must not be administrative staff as they are not sufficiently familiar and/or involved in the research to authorize expenses on the grant holders’ behalf.

R3.3 PIs may delegate signing authority on expenses when necessary to a co-investigator or a member of their research staff, such as a lab manager or research associate.

R3.4 As stipulated by the Tri-Agency, the grantee is responsible for authorizing expenditures from his/her grant account in accordance with the Agency's requirements and conditions of grants and with the institution's policies. No other party may initiate or authorize expenditures from an Agency's grant account without the grantee's written delegated authority.

R3.5 The signing of expense reports payable to visiting researchers may not be delegated and must be countersigned by the Dean or Chair.

R4. Travel Advances, Expense Reports and Payment Requests

R4.1. The FFM/PI must approve all travel advances, expense reports and payment requests charged to their fund(s)/grant(s).

R4.2. Delegates may be set-up using the Minerva menu: Delegate Temporary Signing Authority for travel advances, expense reports and payment requests - Minerva menu option (sign-in is required) [ view the How to Use Minerva page]

R4.3. Delegating signing authority for the Travel Advance document type allows the delegate(s) to sign the Travel FOAPAL Authorization forms found on the Travel Services website.
R5. **Purchase Requisitions, Change Orders and Pcard Transactions**

**R5.1.** The FFM/PI must approve (online approval) all purchase requisitions, change orders and PCard transactions charged to their fund(s)/grant(s).

**R5.2.** Delegates may be set-up using the Minerva menu: Delegate Approvals of Purchase Requisitions, Change Orders and PCard Transactions - [Minerva menu option](#) (sign-in is required) [view the How to Use Minerva page](#).

R6. **Naming a Delegate in an Acting Capacity as Unit Head during Temporary Absences**

**R6.1.** Vice-Principals, Deans, Directors, or Chairs may name delegates in an acting capacity as Unit Head during temporary absences (e.g. business travel, vacation, etc.).

**R6.2.** Delegates may be set-up using the Form: [Naming a Delegate in an Acting Capacity as Unit Head during temporary absences](#).