

HOW TO Delegate Approvals of Adjustments on Past Payroll Transactions

A Fund Financial Manager (FFM) may delegate their approval authority for Past Payroll Adjustments (PAs).

- The delegate must be an academic or an administrative staff member possessing the necessary skills and knowledge for the effective exercise of authority.
- The delegate must be a FIS User with Payroll Details
- For Research Grants and Contracts, delegates cannot be assigned to funds where the grant was awarded to the individual as a Principal Investigator.

Electronically approving 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.

Which Funds can be Delegated?

- All unrestricted, non-research restricted funds and endowment funds.
- Research Grants and Contracts: Only CRC main funds.

To become a delegate, a delegation record must be created and a Fund Financial Manager must confirm the record.

Records are created and queried in **Minerva > Finance (Fund) Administration > Adjust Past Payroll Transactions > Delegate Approvals of Adjustment on Past Payroll Transactions** menu option.

Step-by-Step Instructions

1. Log in to [Minerva](#).
2. Go to the **Finance (Fund) Administration** Menu
3. Select the **Adjust Past Payroll Transactions** menu option
4. Click on the **Delegate Approvals of Adjustments on Past Payroll Transactions** menu option.
5. Select the scenario/option which pertains to your role:
 - Option 1: If you are the Fund Financial Manager (FFM) or Principal Investigator (PI), your McGill ID will auto-populate in the FFM ID field. If you want to create a delegation for yourself, go to step 7.

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- **Option 2:** If you are the Fund Financial Manager (FFM) or Principal Investigator (PI), and you want to create a delegation record for another FFM/PI, enter their McGill ID in the **FFM ID** field. Hit **TAB** and a list of funds allowed for delegation will display.
- **Option 3:** If you are a FIS User with Payroll Details, enter the McGill ID of the Fund Financial Manager / Principal Investigator for whom you are preparing the delegation record.

When delegation records are created on behalf of a Fund Financial Manager or Principal Investigator, **email alerts** are sent out to the FFM or PI twice daily at 10am and 2pm. Clicking on the link in the email will bring them to the **Delegate Approvals of Adjustments on Past Payroll Transactions** menu option in Minerva (sign-in is required).

6. Hit the **TAB** key to validate the ID. The FFM's name will appear next to the field.

Manage Approval Delegates

You may create approval delegation records on behalf of an FFM or for yourself. Enter the McGill ID of the FFM for whom you are preparing delegation records.

Enter the McGill ID of the person to whom you wish to delegate approval responsibility, along with an effective and termination date. Existing delegates or those awaiting confirmation by the FFM will be shown below. (active)

Effective Date must not be prior to today's date.
Termination Date must not be greater than 365 days from the effective date.

FFM ID [Search](#) Helpful Links

ID Of Approval Delegate [Search](#)

Effective Date (DD-MON-YYYY) 📅

Termination Date (DD-MON-YYYY) 📅

<input type="checkbox"/> Select All	Fund	Delegate Name	Effective Date	Termination Date	Confirmation Date
<input type="checkbox"/>	000000 - Faculty Staff Endowment	<input type="text" value="000000000"/> - Name Change	19-Feb-2021	31-Mar-2021	Awaiting Confirmation
<input type="checkbox"/>	000000 - Science Technology Fund	<input type="text" value="000000000"/> - Name Change	19-Feb-2021	31-Mar-2021	Awaiting Confirmation
<input type="checkbox"/>	000000 - Science Office Management	<input type="text" value="000000000"/> - Name Change	19-Feb-2021	31-Mar-2021	Awaiting Confirmation
<input type="checkbox"/>	000000 - Chemical Engineering Dept	<input type="text" value="000000000"/> - Name Change	19-Feb-2021	31-Mar-2021	Awaiting Confirmation

7. In the **ID of Approval Delegate** field, enter the McGill ID of the person to whom you wish to delegate approval responsibility. Click on Search if the ID is not known.
8. Hit the **TAB** key to validate the ID. The individual's name will appear next to the field.

Note: Only FIS Users with Payroll Details can be delegates. If the following message appears you will not be able to complete the delegation record.

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Manage Approval Delegates

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Enter the McGill ID of the person to whom you wish to delegate approval responsibility, along with an effective and termination date. Existing delegates or those awaiting confirmation by the FFM will be shown below. Only entries confirmed by the FFM are active.

Effective Date must not be prior to today's date.

Termination Date must not be greater than 365 days from the effective date.

FFM ID Search

ID Of Approval Delegate Search *John Doe is not authorized to be a Delegate.*

Effective Date (DD-MON-YYYY)

Termination Date (DD-MON-YYYY)

Apply Revoke

9. Enter an **Effective Date**. The effective date must not be prior to today's date.
10. Enter a **Termination Date**. The termination date must not be greater than 365 days from the Effective Date.

Note: The format of the date should be 01-MAR-2021 for a date of March 01, 2021.

Delegations will be automatically revoked at the termination date and will disappear from the screen.

11. From the **list of funds**, associated with the FFM/PI, select the funds to be assigned to the Delegate by:
 - o Checking the **box next to the individual fund(s)**.

<input type="checkbox"/> Select All	Fund	Delegate Name	Effective Date	Termination Date	Confirmation Date
<input checked="" type="checkbox"/>	1000000 Faculty Staff Compensation				

OR

- o Checking the **Select All box**,

<input checked="" type="checkbox"/> Select All	Fund	Delegate Name	Effective Date	Termination Date	Confirmation Date
<input checked="" type="checkbox"/>	1000000 Faculty Staff Compensation				

Note: Only funds that have been selected in FZMFUND are allowed to have delegates for past payroll adjustments will display.

12. Scroll back to the **Manage Approval Delegates** box near the top of the screen.
13. Click **Apply**.

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Once the record is created, the Name and McGill ID of the Approval Delegate will appear under the selected fund(s).

For all delegate records created on behalf of a FFM / PI, there will be a message "Awaiting Confirmation" displayed next to the name and McGill ID of the intended delegate. These records must be confirmed by the FFM /PI.

How to Confirm or Revoke Approval Delegate Records

Fund Financial Managers (FFM) or Principal Investigators (PI) may confirm or revoke records. If you prepared a record **on behalf of an FFM/PI**, you may revoke delegation records you created prior to the record being confirmed.

1. If you are the Fund Financial Manager (FFM) or Principal Investigator (PI), click on the link in the email you received (sign-in is required). This will bring you to the Delegate Approvals of Adjustments on Past Payroll Transactions. Otherwise,
 - o Log in to [Minerva](#)
 - o Go to the **Finance (Fund) Administration** Menu
 - o Select the **Adjust Past Payroll Transactions** menu option
 - o Click on the **Delegate Approvals of Adjustments on Past Payroll Transactions** menu option
2. A list of approval delegates associated to each fund, or those "Awaiting Confirmation" will be displayed.

Note: To view who requested the approval delegation record, **hover over the McGill ID** of the delegate. An info box will be displayed - " First name Last name".

Option 1: Confirm/Revoke a delegation record for **one fund**:

3. Click on the **McGill ID button**, next to the name of the delegate awaiting confirmation. Their ID and name will appear in the **ID of Approval Delegate** field.
4. Select the fund for which that delegate has a record "Awaiting Confirmation" by clicking on the **check box** next to the fund.
5. Click on the **Confirm** button to confirm the selected record which is "Awaiting Confirmation".
OR
Click on the **Revoke** button to cancel/remove the selected record.
6. Repeat steps 3 to 5 for the rest of the funds (if any)

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Option 2: Confirm/Revoke delegation records "Awaiting Confirmation" for **all funds**

1. Click on the **McGill ID button**, next to the name of the delegate awaiting confirmation. Their ID and name will appear in the **ID of Approval Delegate** field.
2. Check the **Select All** box.
3. Delete the **Effective** and **Termination Dates**.

Note: Leaving the Effective and Termination dates populated will only allow you to approve delegation records which have the same effective and termination dates.

<input type="checkbox"/> Select All	Fund	Delegate Name	Effective Date	Termination Date	Confirmation Date
<input type="checkbox"/>	600700 - Faculty & Council (Mtg Fund)	100112000 - Nancy/Pear	06-Apr-2021	31-Mar-2022	Awaiting Confirmation
<input type="checkbox"/>	600700 - Faculty & Council (Mtg Fund)	100112000 - Nancy/Pear	06-Apr-2021	31-Mar-2022	Awaiting Confirmation
<input type="checkbox"/>	600700 - Faculty & Council (Mtg Fund)	100112000 - Nancy/Pear	06-Apr-2021	31-Mar-2022	Awaiting Confirmation
<input type="checkbox"/>	600700 - Faculty & Council (Mtg Fund)	100112000 - Nancy/Pear	06-Apr-2021	31-Mar-2022	Awaiting Confirmation

4. Click on the **Confirm** button to confirm the selected record which is "Awaiting Confirmation".
OR
Click on the **Revoke** button to cancel/remove the selected record.

Note: Once a delegation record is "confirmed", only the FFM/PI may revoke the record.

Once a delegation record is confirmed, the delegate will be able to approve PAs on behalf of the FFM.