

Purpose: As the PI, you may want to designate an associate to provide assistance with your Pre-award records. The Designate differs from the Team Member, in that the Designate has access to all of the PIs Pre-award records. The Team Member is only assigned by the PI to specific Pre-award records. Individuals that can be designated, must however, have a role as **Team Member** in RMS.

Designates have access to pre-award/applications equivalent to a Researcher where they can edit or contribute to a PI's Pre-award records when designated by the PI. Approvers (e.g., Department Head, ADR) do not have permission to add Designates.

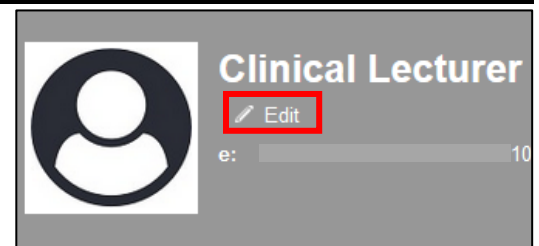
While Designates do not receive notifications, they can email contacts from within RMS.

Audience: PI, Team Member

To add a Designate:

Step 1:


Click **Edit** beneath your name in the dashboard banner. The *Key Information* page displays.

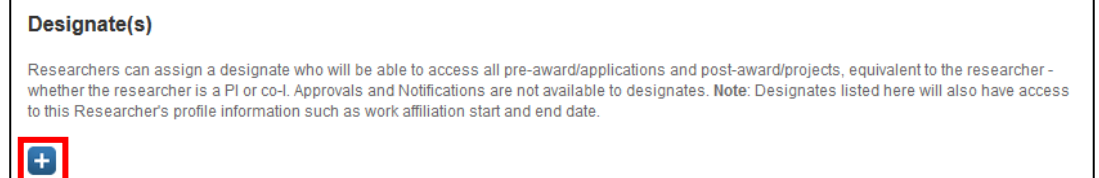


Step 2:


Scroll down to the bottom of the *Key Information* tab.

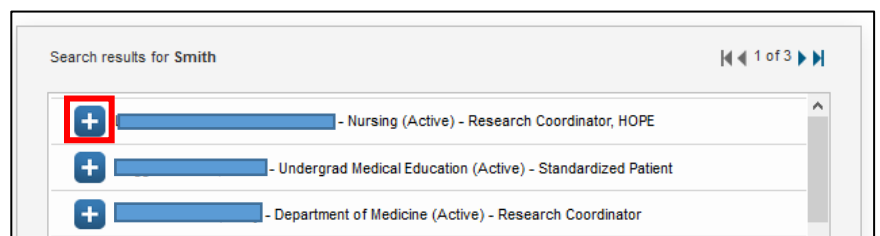
Step 3:

Click the  icon at the bottom of the page below **Designate(s)**. The search field displays.



Step 4:

Type the name of the person you want to designate and then add the designate by clicking  icon beside the name of the person you want to add.



Step 5:

Click **Save** to apply the change. The Designate can now view all records associated with the PI who added them as a designate.



Removing a Designate:

Step 1:


Follow **Steps 1 and 2** from above, then click the trash can icon beside the person you want to remove.


Step 2:

Confirm the deletion by clicking **Save**.

Administrator(s)

Researchers can assign an administrator who will be able to access all applications and projects, equivalent to the researcher, as well as receive the same notifications - whether the researcher is a PI or Co-I.

Name	Email	Phone	Organization	
Stark, Tony				 1.



2.