# Maintaining Roles on Projects

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| 1.   | Employees with **UVA GM Role Manager** responsibility or **UVA GM Limited Setup Specialist** responsibility can maintain **Key Member** roles on projects.  
This example illustrates what you see if you are logged in as a **UVA GM Role Manager**.  
Click the **expand** button on the UVA GM Role Manager. |
<p>| 2.   | Double-click on <strong>Projects</strong>. |</p>
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| 3.   | There are many ways to query Projects.  
You can search for one particular Project or all projects that meet certain criteria.  
This example illustrates finding all the *Active* Projects on which one employee holds the active Key Member role of ‘Fiscal Contact’. In this example ‘Roberts, Lynda M’ has been entered in the Key Member field (the employee number is populated automatically).  
In this example the Status field LOV has been selected and the ‘*All Except CLOSED*’ status has been selected.  
In this example we are searching for Roberts, Lynda M in the Fiscal Contact role in all statuses ‘*All Except CLOSED*’.  
Click the **Find** button.  
The Projects, Templates Summary window lists all the projects, except those with status "closed," on which Lynda M Roberts is the current Fiscal Contact. |
| 4.   | The Projects, Templates Summary window lists all the projects, except those with status "closed," on which Lynda M Roberts is the current Fiscal Contact.  
Select a Project.  
Click the **Open** button. |
| 5.   | Click on **Key Member** in the options region. |
| 6.   | Click the **Detail** button. |
| 7.   | The Effective To date, 31-Mar-2013, has been entered for Lynda Roberts as Fiscal Contact.  
Please note you may be changing more than one role in a session depending on the circumstances.  
Press **[Enter]** to continue. |
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| 8.   | The Employee Name, 'Marbury, Patricia A (Patty)' has been selected.  
      | Click the list of values (LOV) ellipsis in the **Role** cell to choose Fiscal Contact.  
      | **NOTE:** The Fiscal Contact and the Approver cannot be the same person for non-G&C reportable project types. If this was a G&C reportable project type the Fiscal Contact and Principal Investigator cannot be the same person. |
| 9.   | Select 'Fiscal Contact'.  
      | Click the **OK** button. |
| 10.  | Enter the effective **FROM** date for the new role holder.  
      | The day after the previous employee's **TO** date is the correct entry.  
      | Enter a valid date e.g. a valid value e.g. "01-APR-2013".  
      | **NOTE:** The required roles may not be vacant for even one day. Project Managers cannot have overlapping effective dates.  
      | Select Save icon.  
      | Recon@ will reflect changes the day after the **Effective From** date.  
      | In this example above, a Recon@ role, the changes would be reflected in Recon@ the next day (02-April-2013).  
      | Press **[Enter]** to continue. |
| 11.  | Save your work then close.  
      | Click the **Close** button. |
| 12.  | Click the **Close** button. |
13. **REMEMBER**

Required roles for non-G&C Reportable Projects:
- Project Manager
- Fiscal Contact
- Approver

NOTE: The Fiscal Contact and the Approver cannot be the same person.

Required roles for G&C Reportable Projects:
- Fiscal Contact

NOTE: Project Manager and Principal Investigator (PI) are also required but can only be changed by OSP, therefore won’t be shown in the role list of values for you to select.

NOTE: The Fiscal Contact and Principal Investigator cannot be the same person.

The required roles should not be vacant for even one day.

When a person is no longer responsible for a project their **Effective To** date is entered. The succeeding person must be named and entered with the next day's date in the **Effective From** field.

Optional roles for all project types:
- Examiner
- Fiscal Officer

NOTE: On a G&C Reportable Project, if you tab to the Principal Investigator or Project Manager row and attempt to add a new record using the green plus sign icon (+) the message ‘This role cannot be updated on a sponsored program award, contact OSP’ will appear.

If you need to add a new key member to a G&C Reportable project, click on the Fiscal Contact row, then click the **New Record** icon.

When key member changes are required on 50 or more awards and/or projects you can request a mass update by following these procedures.

14. This concludes the topic, Revising Key Members on Projects.

**End of Procedure.**