What kind of PI Portfolio access do I need?

Start →

Do you need to input Projections into the system?
- YES → **Are you a CSS RA?**
  - YES → **Request Role:** Shared Services Research Admin → Finish
  - NO → **Request Role:** Research Administrator → Finish
- NO → **Are you a Manager responsible for RAs, faculty, or faculty funds?**
  - YES → **Request Role:** Oversight → Finish
  - NO → **Are you a staff member who needs to review faculty funds in detail?**
    - YES → **Request Role:** Reporting → Finish
    - NO → **Are you a Faculty Member who needs access to a fellow PI's Portfolio and/or Fund(s) because you are working together?**
      - YES → **Request Role:** Collaborator *Specify the PI and/or Fund in the request* → Finish
      - NO → **No action required.** You already have the Principal Investigator role to review your own funds. → Finish