

## Account Delegate Information

To give an FIS User account delegate permissions:

1. In the FIS, go to TP Documents in FIS.
2. Select the COA Maintenance button located beneath the Financial Documents button.
3. Open the Account Delegate form and input the necessary information.
4. In order to make the user a Primary delegate, type 'Y' in the Primary Rt field. For non-primary delegates, the field should remain blank.

To view account delegates on a particular account:

1. Go to the Inquiries drop-down menu at the top of the screen.
2. Select Reference Tables from the menu.
3. Select Account Delegate.
4. Enter the chart and account number, and select the Search button. This will provide a list of all delegates on an account with a notification of whether they are active or inactive.