Queen's
UNIVERSITY

RA establishes research projects in the PeopleSoft Finance system once all regulatory compliance requirements have been met. The approved documentation is forwarded to RA by Research Services or Research Legal Services, through the TRAQ system. Upon receipt of an "Approval for Research Project Set-up"

Once the start and end date are populated in the Budget Template, this will open the column up, to allow you to enter your budget amounts by category (i.e. Account IDs). Do not enter the Overhead amounts in the worksheet. Overhead details must be entered in the worksheet.

Refer to the Financial Services Learning Catalogue to view a training video on how to complete a Budget Template.

The Research Project Signing Authority and Systems Access Form must be submitted before a research project can be set up. However, changes may also occur throughout the life of the research project,

Program and Class IDs are optional, with the exception of
(projects, which require a program code.

The following is an example of a research ChartField:

30000	42001	600009	10010	1144	393999

For additional details regarding ChartFields, visit the Financial Services website.

PIs or authorized delegates are responsible for creating a in the applicable TRAQ file if there are changes to the research project.

Changes that require a TRAQ Event Amendment may include a change to one of the following:

- Principal Investigator
- Project Name
- Department
- Project Spending Deadline
- Project Funding Amount
- Change to Internship Schedule (for Mitacs Elevate or Accelerate projects)

The documentation that supports the change must be uploaded to the TRAQ file. Once submitted, Research Services or Research Legal Services staff will create an to notify RA staff of the changes required to the research project. RA will make the applicable change to the research project in the PeopleSoft Finance system.

Beginning April 1, 2021, Queen's University began referring to the new Tri-Agency Guide on Financial Administration (TAGFA) for research projects funded by the Canadian Institutes of Health Research (CIHR), the Natural Sciences and Engineering Research Council of Canada (NSERC), and the Social Sciences and Humanities Research Council of Canada (SSHRC). A specific section of the Financial Services website has been dedicated to providing information on the TAGFA, including:

- Background information
- Principles and Directives
- Queen's TAGFA Compliance Plan

The

RA is responsible for preparing, approving and submitting all and to the funding agencies for research projects. RA manages the financial reporting and invoicing deadlines related to research projects.

Financial reporting requirements may include annual, interim and final reports. One common type of report is the , which is required for most Tri-Agency funded projects. There are different reporting templates and formats, depending on the related funding agency and/or research project-4( )]TJETQq0.000y3(i g0 G[d)-4(ea0 g0 G[-)]Tf1 0 0 1 205.61

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