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The (PIs) has been created as a resource tool for new and existing PIs š Y µ v [• h v] À This Œ •] š Ç X provides information on various research finance topics, to assist PIs in fulfilling the various requirements for research projects under their authority.

Y µ v [• Z • Œ Z } µ š] v P Z within Financial Services, which supports the Œ • Œ Z v À] Œ } v u v š š Y µ v [• Ç ‰ Œ } À]] v P Æ ‰ Œ š À] U management of all research funds. RA works closely with funding agencies, researchers, research administrative support, Strategic Procurement Services

Research Services or Research Legal Services, through the TRAQ system. Upon receipt of a "Approval for Research Project Set-up" through the approved TRAQ file, the PI will be asked to submit a and _____, before a project can be established. Projects will be set up within ten business days from the time these two documents are submitted by the PI, through the TRAQ system. Once established, PIs will receive an email notification from RA.

The following flowchart details the lifecycle of a research project:

The completed will be used to establish the research project expense budget in PeopleSoft Finance. The expense budget will not impact how funds are spent, unless there are specific spending guidelines set out by the funder (e.g. Canada Foundation for Innovation).

Tips for completing the Budget Template

- The total budget must match the total funding per the approved Notice of Award, Agreement or Contract.

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Contact details for other major funding agencies are also available on the Financial Services website.

The reimbursement of expenses (both travel and non-travel) incurred while conducting h v] À Œ •] š Ç µ •] v • •] • P } À Œ Travel and Expense Reimbursement Policy and related procedures. This policy was last revised effective January 1, 2021.

The Expense Reimbursement System (ERS) is an easy, point and click, automated, end-to-end online tool that allows users to create, submit, review, and approve . The use of the ERS substantially reduces the time needed for tedious and resource

acQuire is an online e-Procurement system for all procurement activities, including departmental goods and service shopping, interdepartmental requests, and invoice remittances. The payment of supplier invoices is completed through the acQuire system.

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Additional information regarding acQuire, including FAQs, Forms and Training is available on the Strategic Procurement Services website. Contacts details for all Procurement related topics are also available on the website.

The FAST Administrative Support Tool (FAST) allows users to run a variety of financial reports for both research and non-research activity. FAST research reports are available to PIs and delegates, and provide financial information, including budget, revenue, expense and commitment details for research projects. Training resources on the FAST system are available in the Financial Services Learning Catalogue.

The three most commonly used FAST research reports are:

- the Project Summary Report
- the Statement of Operations Research Report
- the Project Statement Report

To log into FAST, beginning on the Y µ v [• h v] À Home Page Œ •] ğ Ç :

- Click (top right corner)
- Go to [t
- Scroll down to the section
- Click
- Click
- Enter your NetID and Password
- Click (right-hand side)

The

There are three ways to resolve a project deficit:

1. Obtain temporary protection from your Faculty/Department/School if the spending of the • µ • ‹ µ v š funding is permitted by the funder. Refer to the _____ available on the Financial Services website under the tab. Once the approved form is received by RA, a temporary budget will be added to the project, with a set reversal date. If the deficit is not resolved at the end of the overdraft period, the expenses (i.e. deficit) will be recoded to the ChartFields provided on the approved form.

   The Research Project Overdraft Request and Approval Form must be:

   - Fully completed
   - Approved by the Department Head
   - Cannot exceed one year in length
   - Cannot extend beyond the Project Spending Deadline of the research project

2. Expenses can be recoded to another acceptable source of funding (eg. usually another research project under the W / [• µ š Z } Œ] š Ç • X

3. In some cases, additional funding may be obtained from the original source of funds. However, this situation is not a common occurrence.

   Please contact your Finance Contact in Research Accounting to discuss your options. Some restrictions may apply depending on the research project and related funding agency

   Additional details regarding Research Project Overspending are available in the Financial Services Learning Catalogue.

Research Accounting contact information is available on the Financial Services website. You may send inquiries related to research project financial matters to research.accounting@queensu.ca or directly to the for the research project. Refer to the Research Projects by Finance Contact listing for a list of contacts by funding category.

The following are additional contact details for units who are associated with post-award administrative matters:

- Research Services: urs@queensu.ca
- Research Legal Services: researchlegal@queensu.ca
- TRAQ Help Desk: traq@queensu.ca
- Strategic Procurement Services: Visit the following webpage for contact details by area.