

# Faculty of Education Graduate Student Research Grant:

## *Steps for Reimbursement for Supervisors and Students*

Congratulations on being awarded a 2013-2014 Faculty of Education Graduate Student Research Grant! There are two critical steps awardees and their supervisors must take in order to access reimbursement funding.

### **Step # 1 Supervisors & Students: Please fill out and submit the Grant Information Form (GIF) to the OGPR.**

Faculty supervisors: please fill out the attached GIF and return it to the OGPR as soon as possible. You and your Department Head's signatures must be filled in before the form arrives at the OGPR.

The GIF is a standard UBC form, the purpose of which is to set up a research account at UBC's Office of Research Services (ORS), through which student awardees can access funds to reimburse their research project expenses. At UBC, research grants can only be set up under the names of UBC faculty.

The OGPR will forward the form to ORS for processing. **Please note that the research account must be set up by April 30, 2014**, but the sooner the GIF is submitted the sooner students will have access to their funds. Tips for filling out the form are found below. The form can also be found at: [http://ogpr-educ.sites.olt.ubc.ca/files/2013/12/GIF\\_GrantInformationForm.doc](http://ogpr-educ.sites.olt.ubc.ca/files/2013/12/GIF_GrantInformationForm.doc)

Research accounts have been set up when supervisors receive a blue "Project Budget" form from ORS. This form contains the name of the student's project, the amount of funds available, the term of the grant and the all-important research grant account number – also known as Project Grant number or PG (e.g.15R12345).

**Supervisors must have the PG number from the blue Research Project Budget form *prior* to filling in the form for reimbursing their student's expenses (see Step #2 below).**

#### **Hints for filling out the GIF**

Below are some instructions for how to fill in the GIF form.

**PRINCIPAL INVESTIGATOR'S SURNAME, GIVEN NAME(S):** This section should contain the **supervisor's name** (remember, ORS can only establish research accounts under the names of UBC faculty).

**UBC FACULTY/DEPARTMENT:** This section should list the supervisor's home department.

**SOURCE OF FUNDS:** The OGPR will complete this portion of the grant information form, so please leave it blank.

**TITLE OF PROJECT:** The **student's name should precede the title of the student's project**, so there is an easy way to identify on the ORS records system that the funds as designated for a student grant. For example, "**Chris Student: Name of Project**". If the student has ethical approval, please use the exact title shown on the student's ethics approval document on the GIF, or ORS will think it is a different project and the funds will not be released. Also, if the student's project has ethical approval, please cite the certificate number on the form where requested.

SIGNATURES - APPLICANT: The applicant is the supervisor. DEPARTMENT HEAD: The supervisor's Department Head.

BUDGET SUMMARY: In this section, supervisors should include only items to be covered by the actual grant, not all the expenses students plan to incur or have incurred in order to complete their research (students please provide your supervisor with this information). If students have not yet incurred expenses, please write down a best estimate of how the funds will be spent in the various expenditure categories. It is very important that the **budget listed does not exceed** the amount of money the student has been awarded. This will only confuse ORS, as they will think that you have some other grant that will pay the balance (and they will chase you for that grant information). So please, stay within your award limit.

CONCERNING ETHICAL REVIEWS: If the student research involves human subjects, ORS will need a record of ethics approval *before* they release funds. Students unsure about whether they require ethical approval for their projects should speak with their supervisor. If students do require ethical approval, they should apply for it as soon as possible. **They cannot access funds until an approved ethics request has been obtained.**

## **Step #2 Supervisors & Students: Claiming Research Expenses.**

Supervisors: All research related expenditures must be detailed on a **Requisition for Payment Request** form. This form is available from your Department Administrator. Students please provide your supervisor with all your original research expense receipts so they can accurately fill in the form. The "requested by" person on the form is the supervisor and the "payee" is the student. The form also asks for the account from which the funds should be drawn. This information, which includes the Project Grant number, is available from the blue sheet (Research Project Budget) that the supervisor will receive from ORS confirming that an account has been set up (please see information on the blue sheet in Step #1 above). When the details of your expenses have been listed on the form, the form must then be co-signed by both you (as PI and supervisor) and your Department Head (as is the case with all research accounts).

Students: Your responsibility is to assist your supervisor in completing the **Requisition for Payment Request** form by providing all of the relevant information about your expenses, along with the necessary original receipts. Note that you should check with your Department on how your payment will come to you. It is likely that UBC Payroll will prepare a cheque for you for the amount listed on the form. Please note that the address on the **Requisition for Payment Request** form will be where the cheque will be sent.

**Important note:** If you wish to hire others to do work for you, please see the memo accompanying this document, titled "**General UBC Policies on Reimbursement and Payment for Work**". UBC has some very specific policies governing how and when you can pay others to do work for you. If you think you might hire a person or service to do work for you, it is critical that you read this important information beforehand.

If you have any questions about the reimbursement process, please contact Christine Wallsworth in the Office of Graduate Programs & Research (OGPR) at 604-822-5217 or christine.wallsworth@ubc.ca