

# Faculty of Education Graduate Student Research Grant:

## *Steps for Reimbursement for Supervisors and Students*

Congratulations on being awarded a 2014-2015 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 Research Project Information Form (RPIF) to the OGPR.**

Faculty supervisors: please fill out the attached RPIF 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 purpose of the RPIF 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, 2015**, but the sooner the RPIF 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:

<https://research.ubc.ca/support-resources/forms-tools-resources/research-project-information-form>

Research accounts have been set up when supervisors receive an email notification from ORS. The notification will have 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, which they will receive by email from ORS directly prior to filling in the form for reimbursing their student's expenses (see Step #2 below).**

#### **Hints for filling out the RPIF**

Below are some instructions for how to fill in each section of the RPIF form.

**UBC PRINCIPAL INVESTIGATOR:** This section should contain the **supervisor's information** (remember, ORS can only establish research accounts under the names of UBC faculty). "Academic Rank" and "Division" may stay blank.

**PROJECT DETAILS:** You do not need to attach a full copy of the application because our office has this information. This section should list the project title. The "Original Funding Source" is the Graduate Student Research Grant (mark section ii as "same as above"). List the student's name, and project length from start date to end date. Check off "UBC (internally-funded)" and enter the grant amount received under "total cash". Also indicate the main institution where the project is taking place.

Skip Section C.

**CERTIFICATIONS & APPROVALS:** Mark yes or no. If yes, please include a certificate number (or "pending" if one has not been received yet). \*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.**

TYPE OF FUNDING: Mark “yes” and skip sections F and G.

SIGNATURES: The Principal Investigator is the supervisor. DEPARTMENT HEAD: The supervisor’s Department Head. DEAN: OGPR Associate Dean.

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

Supervisors: All research related expenditures must be detailed first on either the **Miscellaneous Expense Claim Form (non travel)** [http://resources-educ.sites.olt.ubc.ca/files/2015/04/MiscRequisitionClaim-Form\\_Final-April-2015.pdf](http://resources-educ.sites.olt.ubc.ca/files/2015/04/MiscRequisitionClaim-Form_Final-April-2015.pdf) or a **Travel Expense Claim Form** [http://resources-educ.sites.olt.ubc.ca/files/2015/04/TravelRequisitionClaim-Form\\_Final-April-2015.pdf](http://resources-educ.sites.olt.ubc.ca/files/2015/04/TravelRequisitionClaim-Form_Final-April-2015.pdf). Also, the forms must be signed by the traveler (grad student) along with the authorizing signature (supervisor). Once these Finance Office Expense forms are complete, then a **Requisition for Payment Request** form, which is available from your Department Administrator, will be completed. Students please provide your Department Administrator or supervisor with all your original research expense receipts so they can accurately complete 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, will have been sent to by email directly from ORS. When the details of the expenses have been listed on the form, the form must then be co-signed by both you (as PI and supervisor) and the Department Head (as is the case with all research accounts).

Students: Your responsibility is to assist your Administrative Manager/Supervisor in completing both the **Finance Office Expense Forms**, and the **Requisition for Payment Request or the Travel Requisition** 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 all of the forms 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](mailto:christine.wallsworth@ubc.ca)