



# Research Financial Services

(Research Accounting)

[www.carleton.ca/financialservices/research-accounting](http://www.carleton.ca/financialservices/research-accounting)

Questions? Contact:  
[accounting@carleton.ca](mailto:accounting@carleton.ca)

## What We Do

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- Assist in interpreting and ensuring compliance with funding agency regulations
- Provide advice and ensure compliance with University policies
- Advise on appropriate procedures for financial transactions
- Issue invoices and financial reports

## Types of Funds

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- **Professional Expense Reimbursement (PER) Fund:** an annual entitlement for professional and teaching expenses covered under the provisions of the CUASA Collective Agreement
- **Internally Restricted Research (IRR) Fund:** internal awards, including Start-Up funding, are deposited into your IRR fund for research-related expenses
- **Externally Sponsored Research Funds:** each individual award from an external agency is assigned a unique fund for tracking and reporting expenses
- **Enterprise Funds:** used to track revenue and expenses related to a particular enterprise activity such as a conference or workshop, laboratory services, space or equipment rental etc.

## Getting Started - How to Spend

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### eShop

- Shop the online catalogues from external vendors
- Submit a purchase or cheque requisition
- Order goods or services from an internal service provider

Access system: [www.carleton.ca/eshop](http://www.carleton.ca/eshop)

### Purchasing Card Program

- Use a University Purchasing Card (PCard) to make in-person, low dollar purchases off campus
- Use an eCard to make in-person purchases at participating locations on campus

Information: [www.carleton.ca/purchasing](http://www.carleton.ca/purchasing)

### Travel and Expense

- Claim reimbursement for out-of-pocket expenses, including travel
- Request a travel advance

Access system: [www.carleton.ca/travel](http://www.carleton.ca/travel)

### Hire Students or Staff

Information about payments to students, post-doctoral fellows and staff is available at:

[www.carleton.ca/financialservices/payments-undergraduate-students-faculty-staff](http://www.carleton.ca/financialservices/payments-undergraduate-students-faculty-staff)

## Finance Administration Support Tool (FAST)

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Log into MyResearch through the FAST Portal to view the details of all funds available to you. Click on any fund to view additional information.

Access system: [www.carleton.ca/fast](http://www.carleton.ca/fast)

Information: [www.carleton.ca/facts](http://www.carleton.ca/facts)

## Financial Access and Authority Management (FAAM)

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FAAM is used to manage who has financial authority and access to your funds.

Access system: <https://central.carleton.ca>

Information: [www.carleton.ca/facts/faam](http://www.carleton.ca/facts/faam)

## Policies to Know

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- Approval and Delegation of Authority
- Entertainment and Working Meals Expenses
- Indirect Costs of Research Policy
- Purchasing Card Policy
- Purchasing Policy
- Travel and Related Expenses
- Financial Authority Policy
- Conflict of Interest Policy

All policies are listed at: [www.carleton.ca/secretariat](http://www.carleton.ca/secretariat)

## Contact Research Financial Services

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A Financial Administrator has been assigned to each department as a single point of contact in Research Financial Services.

There are two ways to find your Financial Administrator:

Visit our website to search for your department  
[www.carleton.ca/financialservices/research-accounting](http://www.carleton.ca/financialservices/research-accounting)

Log into FAST MyResearch and click on any fund  
[www.carleton.ca/fast](http://www.carleton.ca/fast)

## Other Contacts for Financial Matters

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**Financial Administration Community Training and Solutions (FACTS)** is a financial services program that provides tools for learning financial systems, policies and procedures.

[www.carleton.ca/facts](http://www.carleton.ca/facts)

email: [facts@carleton.ca](mailto:facts@carleton.ca)

**Financial Information Systems** can help with technical difficulties related to financial systems.

[www.carleton.ca/financialservices/systems](http://www.carleton.ca/financialservices/systems)

email: [financial.systems@carleton.ca](mailto:financial.systems@carleton.ca)

**Purchasing Services** can help with the purchase of large dollar items, including obtaining multiple quotes or submitting for public tender.

[www.carleton.ca/purchasing](http://www.carleton.ca/purchasing)

email: [purchasing@carleton.ca](mailto:purchasing@carleton.ca)

## Handbooks Available

### Professional Expense Reimbursement Handbook

[www.carleton.ca/financialservices/business-operations/accounts-payable/professional-reimbursements](http://www.carleton.ca/financialservices/business-operations/accounts-payable/professional-reimbursements)

### Internally Restricted Research Handbook

[www.carleton.ca/financialservices/research-accounting/for-researchers-2/internally-restricted-research-irr](http://www.carleton.ca/financialservices/research-accounting/for-researchers-2/internally-restricted-research-irr)

### Externally Restricted Research Handbook

[www.carleton.ca/financialservices/research-accounting/for-researchers-2/externally-sponsored-research](http://www.carleton.ca/financialservices/research-accounting/for-researchers-2/externally-sponsored-research)

### Tri-Agency Handbook

[www.carleton.ca/financialservices/research-accounting/for-researchers-2/tri-agency-funding](http://www.carleton.ca/financialservices/research-accounting/for-researchers-2/tri-agency-funding)

### Other Internal Funding Handbook

[www.carleton.ca/financialservices/research-accounting/for-researchers-2/other-internal-funding](http://www.carleton.ca/financialservices/research-accounting/for-researchers-2/other-internal-funding)

### Common Activities Handbook

<https://carleton.ca/financialservices/research-financial-services/for-researchers-2/>

