Research Financial Services
(Research Accounting)

www.carleton.ca/financialservices/research-accounting

Questions? Contact:
accounting@carleton.ca

What We Do
• 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
• 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

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

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

Travel and Expense
• Claim reimbursement for out-of-pocket expenses, including travel
• Request a travel advance
  Access system: 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
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
Information: www.carleton.ca/facts

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/faq

Finance Administration Support Tool (FAST)

Financial Access and Authority Management (FAAM)

Policies to Know

- 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

Contact Research Financial Services

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

Log into FAST MyResearch and click on any fund
www.carleton.ca/fast

Other Contacts for Financial Matters

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
email: facts@carleton.ca

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

www.carleton.ca/financialservices/systems
email: 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
email: purchasing@carleton.ca

Handbooks Available

Professional Expense Reimbursement Handbook
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

Externally Restricted Research Handbook
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

Other Internal Funding Handbook
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/