NSERC & CIHR: Grantees may be away on sabbatical leave for a period not exceeding one year. All subsequent instalments will be frozen until confirmation is received that funding will be given to cover the period of sabbatical leave. A grantee who is on a leave of more than one year must spend a minimum of six months per year in Canada and be classified by the host institution as a sabbatical leave. Should a grant holder be on leave that is not research related, and the leave is not research related, their leave is research related. Grantees may continue to hold and receive funds from their grant during sabbaticals, provided that their leave is research related. Ineligible expenses for Tri-Agency grant holders on sabbatical include:

- Living expenses while on sabbatical (accommodation, meals or per diem).
- Costs of transporting the grantee to the home institution for supervisory purposes.
- Costs of transporting research personnel to and from a grantee's sabbatical leave.
- Direct research expenses, including research assistance, bench fees and travel.
- Costs related to a vehicle necessary for field work (with prior institutional approval).

For NSERC and CIHR grant holders, this is limited to one research leave per period of more than one year. Eligible expenses include:

- Transportation costs to move research equipment or material to and from a grantee's sabbatical leave.

Fiscal Year End Procedures

NSERC only: Funding in the second year of leave will be pro-rated to the anniversary date of the first year of leave and the remainder will be deferred. All subsequent instalments will be frozen until confirmation is received that funding will be given to cover the period of sabbatical leave. A grantee who is on a leave of more than one year must spend a minimum of six months per year in Canada and be classified by the host institution as a sabbatical leave. Should a grant holder be on leave that is not research related, and the leave is not research related, their leave is research related. Grantees may continue to hold and receive funds from their grant during sabbaticals, provided that their leave is research related. Ineligible expenses for Tri-Agency grant holders on sabbatical include:

- Living expenses while on sabbatical (accommodation, meals or per diem).
- Costs of transporting the grantee to the home institution for supervisory purposes.
- Costs of transporting research personnel to and from a grantee's sabbatical leave.
- Direct research expenses, including research assistance, bench fees and travel.
- Costs related to a vehicle necessary for field work (with prior institutional approval).

For NSERC and CIHR grant holders, this is limited to one research leave per period of more than one year. Eligible expenses include:

- Transportation costs to move research equipment or material to and from a grantee's sabbatical leave.
New Faculty Researchers

Although they may not actually arrive on campus until mid-April, we like to reach ahead and welcome our new faculty researchers to Carleton.

As we enter into a new University fiscal year, Research Accounting would like to remind everyone that the annual budget request process is now opening up on May 2011. As this is the start of the University’s fiscal year, each holder of an IOF fund was sent an email in April to begin the annual budget request process.

If you did not receive an email, forms can be accessed through the MyResearch system at http://www2.carleton.ca/fast. To submit your budget request, please use the current calendar year (2011). Budget requests are due on May 15.

For more information, web site link, and training availability to new faculty researchers coming to Carleton, please provide an email address for Research Accounting.

Fiscal Year End Procedures

Once again, it is time to submit your budget request for additional funds out of the Infrastructure Operating Fund (IOF).

MyRe$earch – System Updates

For the 2011 fiscal year, we will be stopping the use of the T4 form for income tax purposes. For the current 2011 fiscal year, all income tax information will be transferred to the government via MyRe$earch. For your reference, the T4 summary is now available in MyRe$earch. If you require posting authority on a MyRe$earch user profile, please contact the Accounting Helpdesk at accounting@carleton.ca.

Planning for a Sabbatical Leave

The statements cannot be submitted without a signature. We will be sending out hard copies to all of the departments for signature and return. While you are away on sabbatical, please ensure that there is a signature and release of the FAST Purchasing Card application.

Ineligible expenses for Tri-Council Agency grant holders on sabbatical include:

- Living expenses while on sabbatical (accommodation, meals or per diem).
- Travel costs to attend conferences.
- Direct research expenses, including research assistance, bench fees and equipment.
- Relocation expenses or travel to return the home location.
- Living expenses while on sabbatical (if approved).
- Expenses for more than one year.

Should a grant holder be on leave that is not research related, and the leave is extending beyond a year, it is the responsibility of the grantee to inform the agency when a grantee is away on sabbatical leave. This includes situations such as migration, or the birth of a child. Agencies must be informed of the location of the grantee in order to charge claims to the appropriate account. This is a responsibility of the grantee to inform their Agency.

Eligible and Ineligible Expenses:

- Field work expenses, when supported by appropriate documentation.
- Residential expenses when the grantee’s residence is not required for supervisory or academic purposes.
- Relocation expenses or travel to return to the home location.
- Living expenses while on sabbatical (if approved).
- Expenses exceeding one year without informing the agency.
- Any relocation expenses or travel to return the home location.
- Expenses for more than one year.

SSHRC:

- If a grant holder is on leave during the second year of a three-year SSHRC grant, the remainder will be deferred until the third anniversary date of the first year of leave and the remainder will be deferred.
- Funding in the second year of leave will be prorated to the anniversary date of the first year of leave.
- All subsequent instalments will be frozen until confirmation is received that the leave is taken.
- If a grant holder is on leave for their annual sabbatical, provided that their leave is research related, they may continue to receive their grant until the anniversary date of the first year of leave.
- If a grant holder is on leave that is not research related, and the leave is extending beyond a year, the grantee must inform the agency when a grantee is away on sabbatical leave. This includes situations such as migration, or the birth of a child.

NSERC only:

- Funding in the second year of leave will be prorated to the anniversary date of the first year of leave.
- If a grant holder is on leave for their annual sabbatical, provided that their leave is research related, they may receive their grant until the anniversary date of the first year of leave.
- If a grant holder is on leave that is not research related, and the leave is extending beyond a year, the grantee must inform the agency when a grantee is away on sabbatical leave. This includes situations such as migration, or the birth of a child.

A grantee who is on a leave must inform the agency when a grantee is away on sabbatical leave. If a grantee is away on leave, it is their responsibility to inform the agency when a grantee is away on sabbatical leave. This includes situations such as migration, or the birth of a child. Agencies must be informed of the location of the grantee in order to charge claims to the appropriate account. This is a responsibility of the grantee to inform their Agency.

Ineligible expenses for Tri-Council Agency grant holders on sabbatical include:

- Living expenses while on sabbatical (accommodation, meals or per diem).
- Travel costs to attend conferences.
- Direct research expenses, including research assistance, bench fees and equipment.
- Relocation expenses or travel to return the home location.
- Living expenses while on sabbatical (if approved).
- Expenses for more than one year.

Should a grant holder be on leave that is not research related, and the leave is extending beyond a year, it is the responsibility of the grantee to inform the agency when a grantee is away on sabbatical leave. This includes situations such as migration, or the birth of a child. Agencies must be informed of the location of the grantee in order to charge claims to the appropriate account. This is a responsibility of the grantee to inform their Agency.

Eligible and Ineligible Expenses:

- Field work expenses, when supported by appropriate documentation.
- Residential expenses when the grantee’s residence is not required for supervisory or academic purposes.
- Relocation expenses or travel to return to the home location.
- Living expenses while on sabbatical (if approved).
- Expenses exceeding one year without informing the agency.
- Any relocation expenses or travel to return the home location.
- Expenses for more than one year.

SSHRC:

- If a grant holder is on leave during the second year of a three-year SSHRC grant, the remainder will be deferred until the third anniversary date of the first year of leave and the remainder will be deferred.
- Funding in the second year of leave will be prorated to the anniversary date of the first year of leave.
- All subsequent instalments will be frozen until confirmation is received that the leave is taken.
- If a grant holder is on leave for their annual sabbatical, provided that their leave is research related, they may continue to receive their grant until the anniversary date of the first year of leave.
- If a grant holder is on leave that is not research related, and the leave is extending beyond a year, the grantee must inform the agency when a grantee is away on sabbatical leave. This includes situations such as migration, or the birth of a child.

NSERC only:

- Funding in the second year of leave will be prorated to the anniversary date of the first year of leave.
- If a grant holder is on leave for their annual sabbatical, provided that their leave is research related, they may receive their grant until the anniversary date of the first year of leave.
- If a grant holder is on leave that is not research related, and the leave is extending beyond a year, the grantee must inform the agency when a grantee is away on sabbatical leave. This includes situations such as migration, or the birth of a child.

A grantee who is on a leave must inform the agency when a grantee is away on sabbatical leave. If a grantee is away on leave, it is their responsibility to inform the agency when a grantee is away on sabbatical leave. This includes situations such as migration, or the birth of a child. Agencies must be informed of the location of the grantee in order to charge claims to the appropriate account. This is a responsibility of the grantee to inform their Agency.

Ineligible expenses for Tri-Council Agency grant holders on sabbatical include:

- Living expenses while on sabbatical (accommodation, meals or per diem).
- Travel costs to attend conferences.
- Direct research expenses, including research assistance, bench fees and equipment.
- Relocation expenses or travel to return the home location.
- Living expenses while on sabbatical (if approved).
- Expenses for more than one year.

Should a grant holder be on leave that is not research related, and the leave is extending beyond a year, it is the responsibility of the grantee to inform the agency when a grantee is away on sabbatical leave. This includes situations such as migration, or the birth of a child. Agencies must be informed of the location of the grantee in order to charge claims to the appropriate account. This is a responsibility of the grantee to inform their Agency.

Eligible and Ineligible Expenses:

- Field work expenses, when supported by appropriate documentation.
- Residential expenses when the grantee’s residence is not required for supervisory or academic purposes.
- Relocation expenses or travel to return to the home location.
- Living expenses while on sabbatical (if approved).
- Expenses exceeding one year without informing the agency.
- Any relocation expenses or travel to return the home location.
- Expenses for more than one year.

SSHRC:

- If a grant holder is on leave during the second year of a three-year SSHRC grant, the remainder will be deferred until the third anniversary date of the first year of leave and the remainder will be deferred.
- Funding in the second year of leave will be prorated to the anniversary date of the first year of leave.
- All subsequent instalments will be frozen until confirmation is received that the leave is taken.
- If a grant holder is on leave for their annual sabbatical, provided that their leave is research related, they may continue to receive their grant until the anniversary date of the first year of leave.
- If a grant holder is on leave that is not research related, and the leave is extending beyond a year, the grantee must inform the agency when a grantee is away on sabbatical leave. This includes situations such as migration, or the birth of a child.

NSERC only:

- Funding in the second year of leave will be prorated to the anniversary date of the first year of leave.
- If a grant holder is on leave for their annual sabbatical, provided that their leave is research related, they may receive their grant until the anniversary date of the first year of leave.
- If a grant holder is on leave that is not research related, and the leave is extending beyond a year, the grantee must inform the agency when a grantee is away on sabbatical leave. This includes situations such as migration, or the birth of a child.
Ineligible expenses for Tri-Council grants (NSERC, SSHRC, or CIHR) are:

- Travel costs to attend conferences.
- Transportation costs to move research equipment or material to and from a sabbatical location.
- Costs of transporting research personnel to and from a grantee’s sabbatical location.
- Costs of transporting the grantee to the home institution for supervisory purposes.
- Costs related to a vehicle necessary for field work (with prior institutional purchase). The costs of turn trip ticket only, except in unusual circumstances.
- The costs of travel between the home institution and the sabbatical location.

Researchers holding Tri-Council grants (NSERC, SSHRC, or CIHR) are reminded to submit their eligible expenses to Research Accounting before the start of the second year of their leave. If they fall into the category of research leave for more than one year, the funding and spending restrictions come into effect at the start of a second year. Should a grant holder be on leave that is not research related, and the leave is for more than one year, funding and spending restrictions come into effect at the start of a second year.

NSERC & CIHR:

- Funding in the second year of leave will be pro-rated.
- Researchers should keep in mind that each agency has different guidelines that apply when sabbatical leave is considered.

Researchers coming to Carleton are encouraged to provide their email address to Research Accounting before they arrive on campus. They will become familiar with the Carleton financial systems and processes.

For more information on the budget request process, go to http://www2.carleton.ca/finance/ccms/wps/site/ResearchMoneyMatters/PlanningforSA SabbaticalLeave/..html for more information on the budget request process.