

Proposal Development Assistance (PDA) or Research Acceleration Program (RAP) Processing Information

- 1. As with any expense at the UofS, complete the required documentation as per UofS policies and guidelines, *up to* the section requiring a CFOPAL.
 - Refer to U of S Forms & Guidelines at:

Financial Services Division http://www.usask.ca/fsd/resources/index.php
Human Resources Department http://www.usask.ca/fsd/resources/index.php

- For assistance in completing the required documentation, please contact your department's Administrative or Human Resource contact
- 2. For entering the CFOPAL, there are 2 options as there will be NO UniFi fund set up for your PDA or RAP:

Option 1

- Use one of your CFOPALs and sign as Fund Manager
- Submit expense documentation to Payment Services or Payroll
- Once expenses appear in your UniFi fund, print (or create a pdf) a screen shot clearly identifying which expenses are to be transferred, up to your approved PDA/RAP amount.
- Forward screen shot to Institutional Programs

Option 2

- Leave CFOPAL and Fund Manager Signature blank on expense documentation.
- Forward expense documentation to Institutional Programs. If total is more than approved PDA or RAP, please provide a CFOPAL for the additional amount. Documentation to forward:

Professional Grant Writing - Paying an Individual
 Copy of Certification page from Employee vs
 Contract Questionnaire; Original Invoice; Service
 Requisition

Professional Grant Writing - Paying a company
Original Invoice; Cheque Requisition

Travel for PI

- Authority to Travel approved by supervisor.
 CFOPAL can be provided by Institutional Programs to use this for booking airfare.
- Authority to Travel, Original travel documents & invoices; Travel Expense Claim

Admin Assistance

- Complete an Employee vs Contract
 Questionnaire, then contact your department
 Admin or HR person to assist with other necessary
 documents based on your situation
- If entering an "employment job" electronically, Admin or HR person may need to contact Institutional Programs for CFOPAL.
- If a Contract, follow Paying an Individual steps above

Group Communication

- Internal UofS departments contact Institutional Programs for CFOPAL when booking; forward copy of internal invoice
- External expenses Original Invoice; "Cheque Requistion"
- Both options will require a <u>Summary of Expense Form</u> to be sent with all expense documentation. Ensure
 you answer the questions describing the impact of your PDA or RAP funding on the grant proposal
 development.

Forward all documents and inquiries to: Marty Hayden, Administrative Coordinator Institutional Programs, Research Services 3rd Floor -110 Gymnasium Place 966-1474 or martina.hayden@usask.ca