



QUARTERLY CHECKLIST

for managing your research funding

1. **Have all revenues been received? If not, what's outstanding? (Tri council funding comes in quarterly installments) Where applicable, and to ensure prompt receipt of current and future funding installments, all progress, technical reports and other deliverables need to be submitted to the funding agency as specified in your agreements.**
2. **Are all expenses accounted for?**
3. **Are your personal advances cleared? (by submitting a claim for reimbursement)**
4. **Are expenses coded to appropriate account codes?**
5. **Are your Purchase Orders received and cleared?**
6. **Are expenses eligible under agency's guidelines?**
7. **Are fund balances in a deficit?**
8. **Do the actual expenses align with the project budget and timeline?**
9. **Does your contract require an extension?**
10. **Is your grant expiring/expired and require financial reporting, closing out?**

If you require any training/refreshing/guidance within FAST Portal, please contact us and we'll gladly help out.

Sincerely,

Research Finance Staff

Jake Harder, BComm
Financial Analyst
Tel. 250.960.6534
Email. jake.harder@unbc.ca
Website: www.unbc.ca/research

Kathleen Denis
Research Grants Officer
Tel. 250.960.5615
Email. kathleen.denis@unbc.ca
Website: www.unbc.ca/research