

OUTGOING FUNDING REQUEST FORM

Complete the following sections and email the form to orsfinance@uvic.ca. Processing timelines may vary depending on the nature of the request.

1. Sections 1, 2, and 3 (Mandatory)
2. Sections 4 (**New Request Only**) or Section 5 (**Amendment Only**)
3. Appendix A (For Tri-Agency Awards excluding NSERC Alliance) or
4. Appendix B (For Non Tri-Agency Awards and NSERC Alliance)

1. UVIC INFORMATION

UVIC Principal Investigator (PI) _____

PI Email Address _____

Form Submitted By (if different from PI) _____

Submitter Email Address _____

Request Date _____

2. RECIPIENT INFORMATION

Recipient Entity Legal Name _____

Recipient Administrative Email _____

(ORS to enter, if necessary)

Recipient Investigator _____

Recipient Investigator Email Address _____

Recipient Investigator Role on Funding Application
(choose one)

Co-applicant/Co-PI

Co-Director

Partner

Collaborator

Other

Please specify: _____

Additional Emails to be Copied on Correspondence _____

3. PRIMARY FUNDING INFORMATION

Funding Agency Name _____

Funding Agency Award No. (If applicable) _____

FAST Account (Funds to be taken from) _____

If you are sending funds to the Recipient for the **FIRST** time from this FAST account,
Fill out [Section 4 – New request](#)

If you have previously sent funds to the Recipient and would like to **AMEND** the existing agreement,
Fill out [Section 5 – If Amending A Previous Request](#)

4. NEW REQUEST

Amount (Note currency if not in CAD \$)		
Project Term	YYYY-MM-DD	to
	YYYY-MM-DD	YYYY-MM-DD
Use of Funds Period (if different than the Project Term)	YYYY-MM-DD	to
	YYYY-MM-DD	YYYY-MM-DD
Can the funds be carried over to the overall project end date?	Yes	No
Will the recipient be conducting research involving humans?	Yes	No
Will the recipient be conducting research involving animals?	Yes	No
Can you confirm that the transfer and expenses are eligible under the primary funding held at UVIC? (See Section 3)	Yes	No

Fill out Appendix A or B

Funds are from <i>(choose one)</i> :	Tri-Agency (excluding NSERC Alliance), Michael Smith	Fill out Appendix A
	Other Funding Sources or NSERC Alliance	Fill out Appendix B

AUTHORIZATION

Principal Investigator Signature	Date
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APPENDIX A (TRI-AGENCY, EXCLUDING NSERC ALLIANCE, NFRF)

Note that the sub-grant budget must adhere to sponsor guidelines and approved use of funds.

STATEMENT OF WORK

BUDGET

Expense Category		Amount for the Current Agreement*
Student salaries (including benefits)	(a) Bachelor's	
	(b) Master's	
	(c) Doctorate	
Non-student salaries (including benefits)	(a) Postdoctoral	
	(b) Other (Provide details below)	
	(i)	
	(ii)	
Professional and technical services/contracts (Provide details)	(a)	
	(b)	
**Equipment (including powered vehicles)		
Material, supplies and other expenditures		
Travel		
Indirect cost/overhead (if applicable)		
Total		

*Transfer of funds agreements are for 1 year only. Subsequent installments are processed through amendments.

**Any equipment purchased with these grant funds (if an approved expense) belongs to the recipient institution:

Yes No

APPENDIX B (NSERC ALLIANCE, NFRF OR NON-TRI-AGENCY)

STATEMENT OF WORK (noting deliverables, if any)

SOW should be sufficiently clear and detailed that someone not involved in the Project could accurately determine whether it had been completed.

RECIPIENT BUDGET

Please include budget details only for the amount to be sent to the recipient and the applicable years as indicated in Section 4 (For clarity, please do not include a full project budget).

Note that the budget must adhere to sponsor guidelines and approved use of funds.

Expense Category		Year		Year		Year	
			to		to		to
		YYYY-MM-DD	YYYY-MM-DD	YYYY-MM-DD	YYYY-MM-DD	YYYY-MM-DD	YYYY-MM-DD
Student salaries	(a) Bachelor's						
	(b) Master's						
	(c) Doctorate						
Non-student salaries	(a) Postdoctoral						
	(b) Other <small>*Provide details below</small>						
Professional/technical services <small>Provide details in "Additional Details" box on pg. 2</small>							
*Equipment							
Materials and Supplies							
Travel							
Events							
Total							

<please see next page>

ADDITIONAL DETAILS (e.g., Professional/technical services, Intellectual Property, etc.):

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*Any equipment purchased with these grant funds (if an approved expense) belongs to the recipient institution:

Yes No

Please note, by default, payment to a recipient will be on a cost reimbursement basis (i.e., a recipient will first incur costs and subsequently invoice UVic for reimbursement of the corresponding amount on a quarterly, semi-annual or annual basis, consistent with the payment schedules of the primary award held at UVic, indicated in Section 2). Should there be any questions or requests regarding specific payment structures, please contact orsfinance@uvic.ca. Please note, any alternative payment structures must adhere to the terms of the primary award held at UVic as well as any project specific requirements.