

Research Financial Administration Training

Understanding New Frameworks, Policies, and Procedures



Research Financial Administration Training

An essential guide to the new framework, policies, and procedures governing research funds at Brandon University, effective June 1, 2026.



Introducing Our New Framework

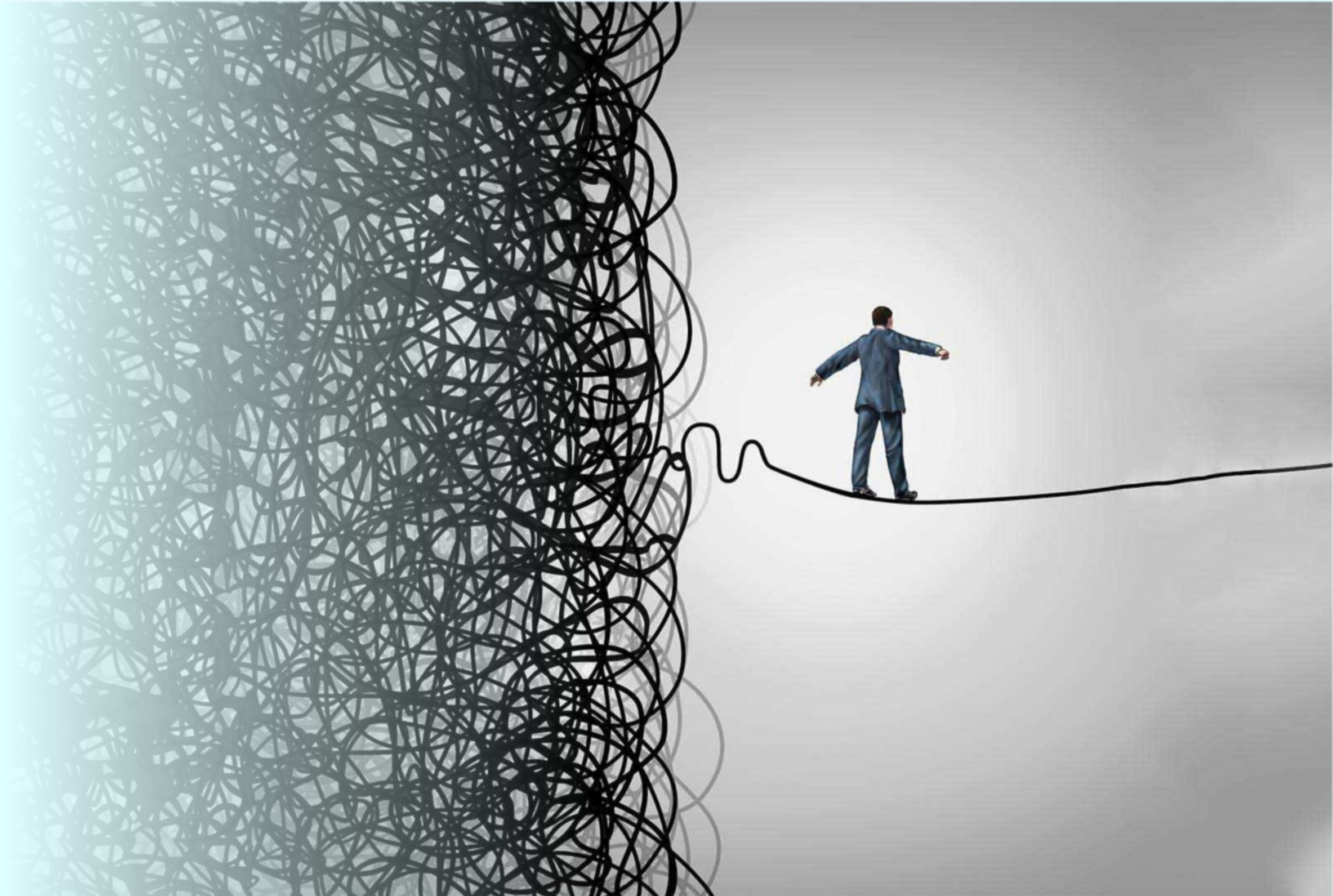
- ➔ A comprehensive Research Financial Administration Framework
- ➔ Updated institutional policies for research funds
- ➔ Standardized procedures and forms for fund management
- ➔ Clear guidelines on how research funds must be used, documented, and reviewed

The Need for Change

- ➔ Ensure research funds are used exclusively for eligible activities
- ➔ Proper documentation and justification for all expenditures
- ➔ Consistent management of research funds across the institution
- ➔ Compliance with all funding body requirements
- ➔ Establish clear expectations and consistent decision-making

Adapting to New Practices

The implementation of this new framework will require adjustments to existing financial administration habits and processes. This training will outline key changes.



Key Stakeholders

- Principal Investigators and Grant Holders
- Research Personnel involved in fund administration
- Anyone using or managing research funds

Your Key Responsibilities

- ➔ Adhering to all new policies and procedures
- ➔ Ensuring funds are used appropriately and ethically
- ➔ Maintaining accurate and complete documentation
- ➔ Understanding and applying core principles to all transactions

Foundation of Financial Integrity

➔ Directly support specific research activities

➔ Be reasonable and appropriate for the research

➔ Be fully documented with clear evidence

➔ Provide no personal benefit to any individual

The Importance of Justification

All research expenses require a clear and comprehensive justification to demonstrate direct support for the research project, ensuring compliance and proper fund utilization.



Timely Submission Requirements



Claims must be submitted within 30 days of the expense date



Late submissions require a detailed justification for the delay



Repeated late submissions will lead to additional scrutiny or claim denial

Essential Forms for Compliance

Beyond standard Financial & Registration Services forms, specific research administration forms like the Research Expense Justification Form and Research Hospitality Expense Form are now mandatory for certain claims. The Expense Justification Form is crucial for travel claims and exceptions.

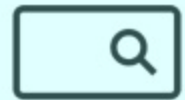


When Additional Review Is Needed

- Claims submitted over 30 days post-expense date
- Incomplete or unavailable documentation
- Expenses deemed unusual in nature or amount
- Requests for exceptions to standard requirements
- Note: Additional review does not guarantee approval.

Understanding the Claim Review Process

A two-stage review ensures compliance and eligibility.



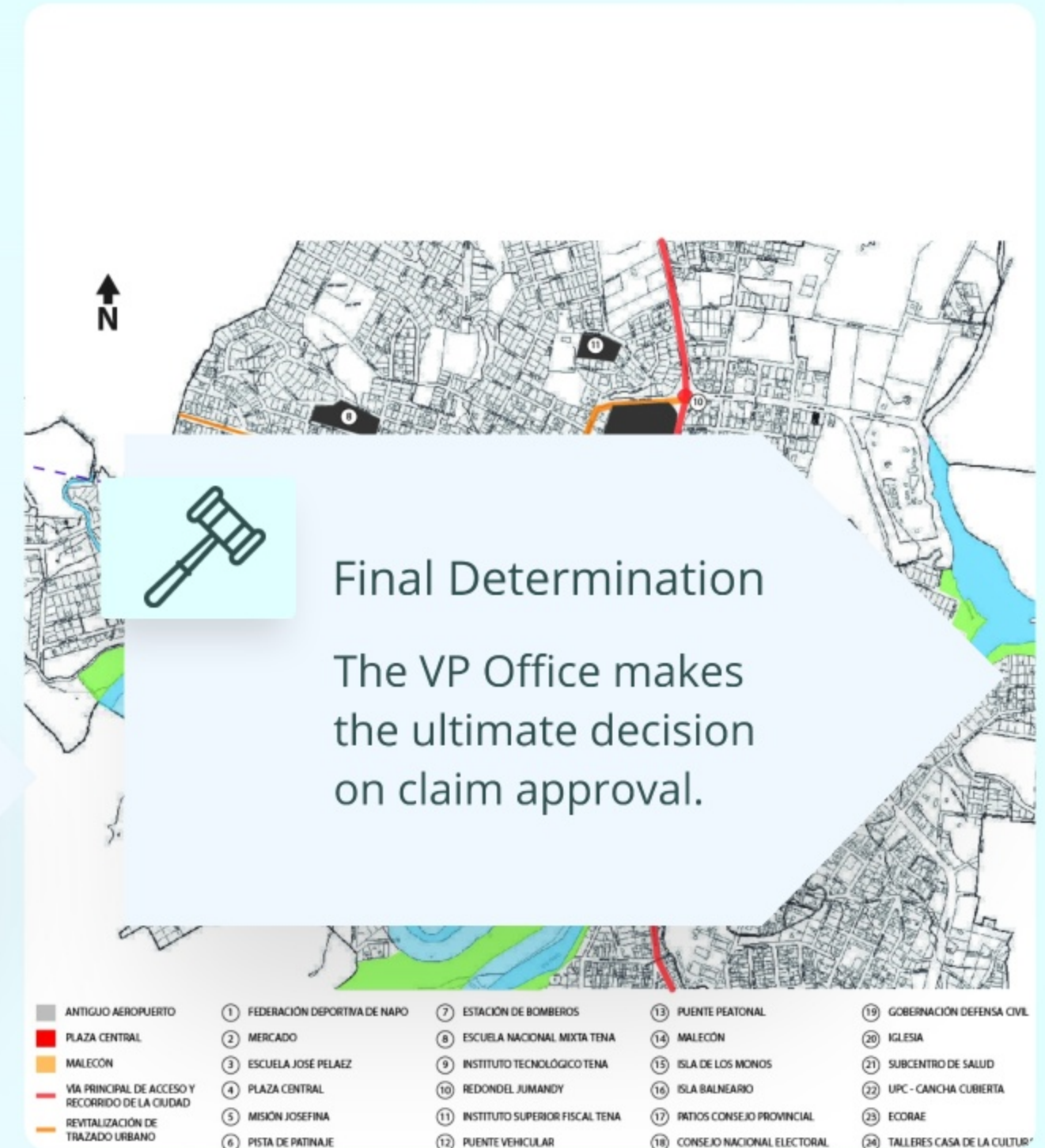
Financial & Registration Services

Review of documentation and adherence to financial requirements.



Office of the VP (Research & Graduate Studies)

Assessment of research justification, eligibility, and exception requests.





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Final Determination

The VP Office makes the ultimate decision on claim approval.

Consequences of Non- Compliance

- ➔ Claim will be returned for additional information or correction
- ➔ Claim will be denied if requirements are not met
- ➔ Potential for delayed reimbursement or project budget impact
- ➔ Repeated non-compliance will lead to further action.

Account Review Triggers

- ➔ Regular internal audits for compliance
- ➔ Identification of repeated non-compliance
- ➔ Concerns raised regarding financial practices
- ➔ Changes in project scope or funding conditions
- ➔ As part of annual reporting or grant close-out procedures

Implementation Timeline

The new Research Financial Administration Framework, policies, and procedures are effective as of June 1, 2026. All new claims and expenditures from this date forward will be subject to these updated guidelines.



Key Support Contacts



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