Western

UNIVERSITY · CANADA

Human Resources & Research Financials Workshop

Wednesday November 1st 11:30-12:30

Today's Agenda

- **Human Resources Information**
- **Accessing ROLA to view grants/proposals**
- **Submitting a new ROLA**
- **Grant/Award Status**
- **Accessing monthly spend reports**
- **Submitting an extension for an award end date**
- **Expense/Conference Reimbursement**

Human Resources

HR: Documentation and Resources

Available on the Education secure area: https://edu.uwo.ca/secure/index.html

Information document and link to submit a request for a part-time hire!

A helpful guide to assist you in onboarding your new hire!

Western Education

HR: Direct Appointments

What to consider when filling out the form link.

- You can directly appoint (no W@W posting) a GSA, Pre-Graduate Research, Post-Graduate Research, or Undergraduate Student Research position.
- The person must be a Western Student.
- Graduate students can only be appointed on a <u>term-by-term</u> basis
- You must seek approval from the Graduate Office to assign more than 20 hours per week (this includes other roles).
- If the student takes a leave from their program, the work must stop (inform the Dean's Office).
- Wherever possible please consider a GSA pay rate that matches the funded GSA positions through the Graduate Office $33.75.
- Reminder for budget planning – part-time benefit rate is now 18% (not 17%)!

HR Roles: What's the difference between a GSA/RA/Associate?

1. **Graduate Student Assistant:** (wage set by Faculty within RA range). The person must be a current (and active) Western Graduate Student from any Faculty. Deliverables include research duties for a faculty member that are not directly related to the student's own research. _Can be appointed directly_.

2. **Research Assistant:** ($23 or more per hour): the person may be external to Western and deliverables are connected to the day-to day research activities of the research centre or grant. It requires a completed undergraduate degree and at least 1 year of experience supporting research. _Must be posted on W@W._

3. **Research Associate:** ($27 or more per hour): the person may be external to Western and deliverables include the oversight of original and independent research under the general direction of a principle investigator. It requires a Master's degree and 3 years of work experience in a research environment at a minimum. _Must be posted on W@W._

HR: Part-time Hiring Guidelines

➢ Standard hour contracts are preferable to variable hour contracts.

  ➢ The supervisor must submit variable hours weekly – never in arrears.

➢ Delegation of any part of the hiring process can only be done with an individual who has HR deliverables in their role.

➢ We cannot offer rates of pay outside the range specified by Western HR.

  ➢ This information is available on the form under the rate of pay question (just follow the link below the question).

11. Rate of Pay: *

(ie $20.00/hour OR $1137.50/month)

Click this link to verify the correct rate of pay: https://uwoca-my.sharepoint.com/:b:/g/personal/hbeecrof_uwo_ca/EQrXnACzs9FOs17frRu6WmMBLMgzDMyurwLmFfIqH4gD2A?e=xEW61Q

Please note: When requesting a reappointment the wage must be the same as it was for the original contract OR you may request a wage that is no more than 1% higher.

Enter your answer
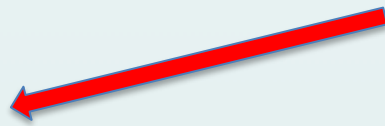
Part-time Staff Job Codes (revised October 1, 2023)

Reference Number -see Profiles below	Job Family	Description	Job Code	Minimum per hour	Maximum per hour
P1	Professional	Research Associate	V9102	31.96	45.00
P2	Professional	Research Engineer	V0692	31.96	45.00
P3	Professional	Technical Specialist	V9105	31.96	45.00
P4	Professional	Coordinator/Officer	V9910	31.96	48.00
P5	Professional	Programmer/Analyst	V9003	31.96	48.00
P6	Professional	Instructor	V9810	33.00	54.00
P7	Professional	Instructor (Non-Credit)	V4033	35.00	60.00
P8	Professional	Project Coordinator/Manager	V9401	33.93	54.00
P9	Professional	Technology Support Specialist	V9912	33.93	54.00

HR: Part-time Hiring Guidelines

➢ All part-time appointments must be a minimum of 8 weeks in duration.

➢ No speedcode = no hire. We are unable to process employment contracts without an active speedcode (the system simply won't let us do it).

>   ➢ Please note, it is the PI's responsibility to ensure there are sufficient funds to cover the full remuneration for the employment contract before requesting the hire.

➢ No one should ever start work without a signed contract in place!

➢ Payments cannot be made in arrears – please ensure you are communicating with your employee about the hours they work and when their contract is done!

HR: After the Hire!

➢ All employees must use their UWO email, for security and liability reasons, personal emails are never to be used. Please ensure your new hire activates and uses their UWO email.

➢ Orientation, orientation, orientation! (including training)

➢ If the new employee is going away and cannot work for any amount of time during the contract, please use the form link to let us know so we can process an LIWW.

➢ Ensure you are checking in with your hire regularly, so absences and other issues are addressed.

➢ Any part-time employee requiring a workspace in FEB can use 1111; contact Megha for the door code. Computers are available in this space.

HR: Reappointments

➢ To reappoint an individual please use the form link and provide us a couple weeks notice.
➢ Reappointments must start the day after the last appointment ends.
  ➢ Note, we can not reappoint after this date has passed and a new contract must be initiated.
➢ Reappointments cannot have an increase to rate of pay that is greater than 1%.
➢ When reappointing Grad students, the start and end date must be within the term.

ROLA / Research Financials

Getting to your ROLA

- There are two ways, depending on if you are starting a new ROLA from scratch (submitting for a new grant) or looking to find a ROLA that has been submitted/drafted.

- To begin a new submission, you want to navigate to https://www.uwo.ca/research/rds/ROLA/ROLAFrameset.html and find the Grant you want to apply to

ROLA HelpDesk Phone 519-661-3136 *** rolahelp@uwo.ca

Research On-line Administration (ROLA) allows you to complete a Proposal, route it for electronic approvals, maintain information pertinent to your Proposals and Awards, extend access to your information, and maintain your research profile.

| MAINTAIN ROLA | MANUALS | QUICK GUIDE | TRAINING | ROLA Q&A | ROLA PROCESS |

Funding Opportunities as of Oct 19, 2023   ☐ Select Discipline

ALZHEIMER SOCIETY CANADA
DOCTORAL AWARD - 2023 COMPETITION | DETAILS | SPONSOR | New ROLA |
NEW INVESTIGATOR OPERATING GRANTS - 2023 COMPETITION | DETAILS | SPONSOR | New ROLA |
POSTDOCTORAL FELLOWSHIP - 2023 COMPETITION | DETAILS | SPONSOR | New ROLA |
ALZHEIMER'S ASSOCIATION
ADVANCING RESEARCH ON CARE AND OUTCOME MEASUREMENT - 2023 COMPETITION | FULL APPLICATION | DETAILS | SPONSOR | New ROLA |
RESEARCH FELLOWSHIP (AARF) - 2023 COMPETITION | FULL APPLICATION | DETAILS | SPONSOR | New ROLA |
AMOSO: ACADEMIC MED ORG SW ONT
AHSC AFP INNOVATION FUND - 2023 FALL COMPETITION | DETAILS | SPONSOR | New ROLA |
CAN ASSOC ORAL & MAXILLOFACIAL SURGEONS
RESEARCH GRANT - 2023 OPEN COMPETITION | DETAILS | SPONSOR | New ROLA |
CAN STATISTICAL SCIENCES INST
DISTINGUISHED POSTDOCTORAL FELLOWSHIPS - 2023 COMPETITION | DETAILS | SPONSOR | New ROLA |
CANADA FIRST RESEARCH EXCELLENCE FUND
PDF COLLABORATIVE RESEARCH GRANT - 2023 OPEN COMPETITION | DETAILS | SPONSOR | New ROLA |
POSTDOCTORAL FELLOWSHIP PROGRAM - 2023 OPEN COMPETITION | DETAILS | SPONSOR | New ROLA |
CANADIAN INSTITUTES HEALTH RESEARCH
CATALYST GRANT - 2023 COMP | ANALYSIS OF CLSA DATA | DETAILS | SPONSOR | New ROLA |
CATALYST GRANT - 2023 COMP | CRISIS LINE AND APP-BASED SUPPORT | DETAILS | SPONSOR | New ROLA |
OPERATING GRANT - 2023 | HCRI DATA ANALYSIS USING EXISTING DATABASES & COHORTS | DETAILS | SPONSOR | New ROLA |
TEAM GRANT - 2023 COMP | STRENGTHENING THE HEALTH WORKFORCE | DETAILS | SPONSOR | New ROLA |
TEAM GRANT - 2023 COMPETITION | LUNG HEALTH | DETAILS | SPONSOR | New ROLA |
CANADIAN SPACE AGENCY
RSRCH, AWARENESS & LEARNING IN SPACE SCIENCE & TECHNOLOGY - 2023 OPPORTUNITIES IN SPACE SCIENCE | OPEN COMPETITION | DETAILS | SPONSOR | New ROLA |
CHILDREN'S HEALTH RSRCH INST
TRANSLATIONAL RESEARCH GRANT FUND - 2023 FALL COMPETITION | DETAILS | SPONSOR | New ROLA |
CQDM
QUANTUM LEAP PROGRAM - 2023 OPEN COMPETITION | DETAILS | SPONSOR | New ROLA |
FRANCE - CANADA RESEARCH FOUNDATION
NEW SCIENTIFIC COLLABORATION SUPPORT PROGRAM - 2023 FALL COMPETITION | DETAILS | SPONSOR | New ROLA |
IVEY RESEARCH FUND
INTERNAL RESEARCH PROGRAM - 2023 RESEARCH FUNDING | DETAILS | SPONSOR | New ROLA |
IVEY PHD THESIS SUPPORT - 2023 PHD THESIS FUNDING | DETAILS | SPONSOR | New ROLA |
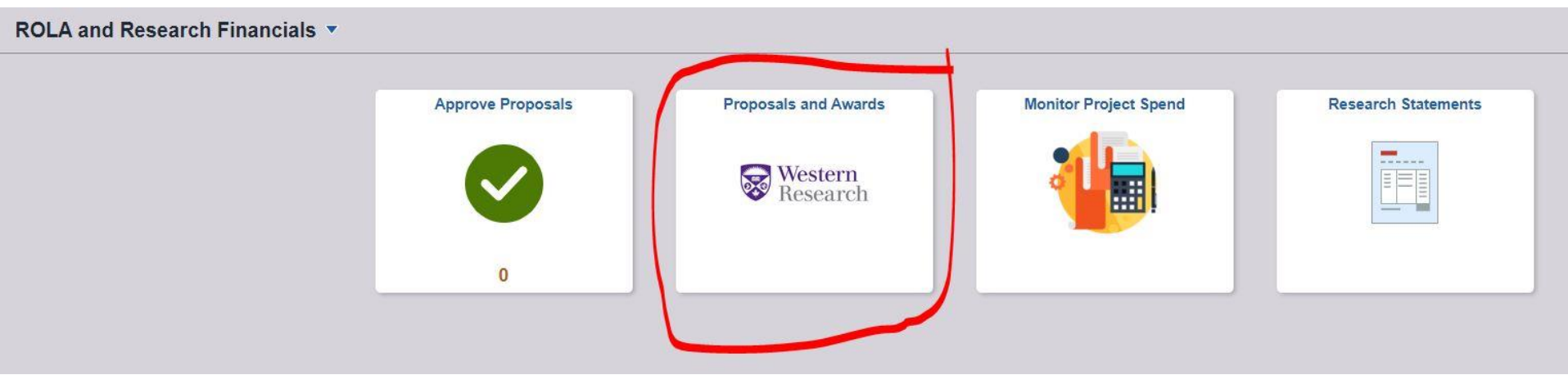NEW FACULTY START UP FUNDS - 2023 NEW FACULTY FUNDING | DETAILS | SPONSOR | New ROLA |
KIDNEY FOUNDATION CANADA

Getting to your ROLA

- We have a step-by-step guide for creation of that new proposal on our site here (its easy!)
- For in-progress proposals, navigate to Western Financials and use the search menu:

Searching…

- The "%" sign is your friend! Placing it at the beginning of a search box acts as a 'partial search'
- Searching by your User ID is a great way to find all your proposals. Your user ID is typically the first part of your email (e.g. "chassan")
- Clicking "Competition ID" after you search will organize your proposals by date!

Proposal Status

- **Draft** -- not submitted – still working on it
- **Pending Approval** -- somewhere in the approval queue; go to Approval Status Review
- **Institution Approved** -- proposal is through the approval stage and waiting for results
- **Awarded** -- proposal has been awarded by agency, an award has been generated (award id is displayed), award is pending activation (view award profile for details) (also anything prior to Sept 2009 was converted into this database with a status of Awarded)
- **Accepted Award** -- proposal has been awarded by agency, and an award has been generated and accepted – speed code to follow – check with research finance if you have not received it
- **Declined** -- RDS has received word that the proposal was not successful
- **Withdrawn** -- Application was Withdrawn from the competition
- **Pending** -- Award has been generated but is pending more information like certification requirements, or a future start date
- **Accepted** -- All requirements have been met and the award has been accepted by RDS and sent to finance for a speed code
- **Closed** -- The award has reached its end date or has no more funding and the research account has been closed.

Western Education

ROLA & Research Financials

Proposal Status FAQ

- **Can I go back and edit my proposal?**
  - Only when it is not submitted and is in "Draft" status. If submitted, it would have to be returned by an Approver for permanent changes to be made.
- **Where is my Speedcode? My proposal says "Institution Approved" or "Pending"**
  - Have you submitted your release of funds form?
  - Have you submitted your Human Ethics #?
- **How long can I expect to wait for a Speedcode assignment?**
  - Typically, once the proposal is submitted with all requirements fulfilled it should take 1-3 weeks.

ROLA & Research Financials

Speedcode Check

- **You should receive an activation email when the Speedcode for an award is generated. If for some reason it does not reach you or it is missed, you can check for a speedcode using this link here**
- Change the lookup to Department, enter "250" into the Dept Code, and your award # (R####A##) into the Project/Grant section. If a speedcode has been generated it will show up below!

Speed Codes

Asterisk (*) indicates a required field

Lookup By:

○ Speed Code
◉ Department/Full Chartfield Combination

To lookup by *Department/Full Chartfield Combination* you must provide at least the first three digits of the *Department* code *
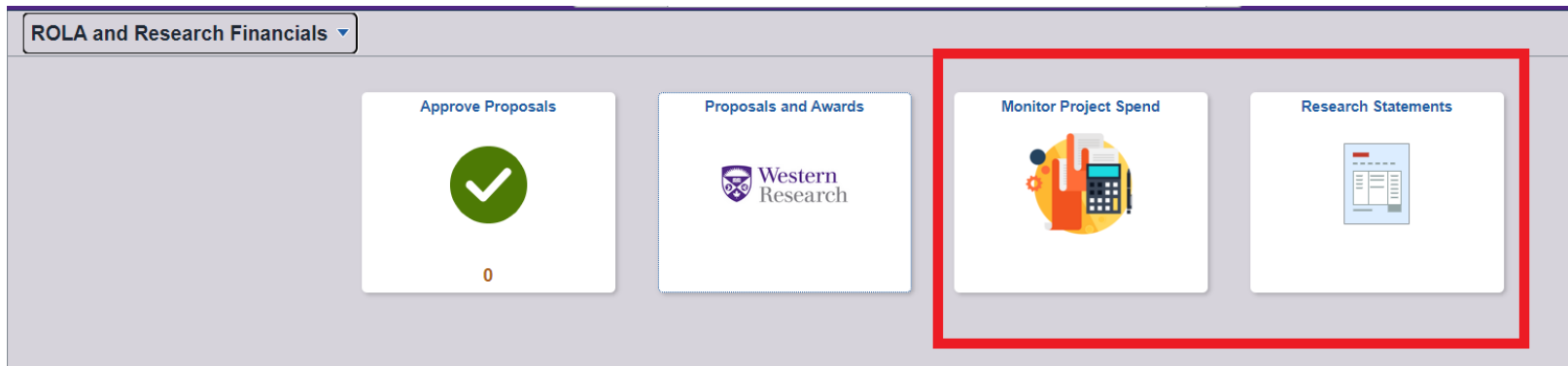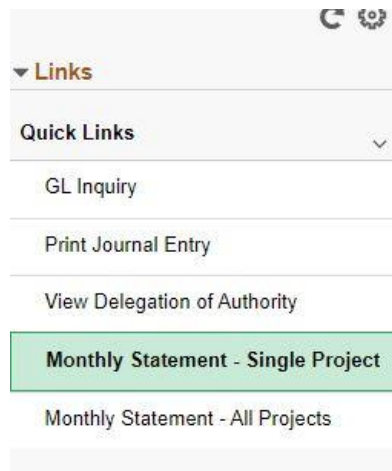
250

And one or more optional chartfields.

Fund

Program

Project/Grant

R####A##

Clear   Search

Monthly Spend Reports

- Back on Western Financials you will want to find either of these buttons

Select "Single Project"
for spending from one award,
"All Projects" if you want to
see all your grants and the
Money used/remaining

Spend Reports Cont'd

- Pick "Add a New Value" and type in what you want to call this search in the Run Control ID box (e.g. "All grants" or "x grant")

Spend Reports Cont'd

- The Fiscal Year runs from May 1st – April 30th. Accounting periods coincide with the months in the Fiscal Year (May = 1, Oct = 6, April = 12).
- Save the search and hit Run when you are ready. You can check the "Print Detail" for advanced spending information (helpful when looking at all grants)

Single Grant Detail

Run Control ID   all   Report Manager   Process Monitor   Run

Single Research Grant Report (UFSRA103)

*Fiscal Year: 2024   *Accounting Period: 5

Research Grant Report Options

Research Grant: R####A##

☐ Print Journal Detail   (Unchecked will print summary data only)

Save   Return to Search   Notify   Add   Update/Display

Format and Type can be changed (e.g. if you want your results in an Excel file)

Reset to Current Date/Time

*Type	*Format	Distribution
Window ⌄	PDF ⌄	Distribution

Spend Reports Cont'd

- When you click "Run" if nothing happens when the new window is populated, try running the same search in a new browser. Google Chrome can have some problems displaying monthly statements/ reports.

If there is no "Queued" section here, try running this query in a different browser!

Award Extension Request

- It is understood that sometimes research is delayed, and to request an extension on an Internal award that has an end date before you plan to be finished, you would need to pass along your award information and justification to the Internal Grants staff:

Internal Grants: intgrant@uwo.ca

Financial Officer Kelly Malone: kmalone7@uwo.ca

Questions?

Expense / Conference Reimbursement

Expense Reimbursement

- There are step-by-step instructions and a [FAQ on our website here](#) that explain how to use the Expense Reimbursement module
- Using the Speedcode you were assigned to your awarded grant (e.g. AB1C) you can navigate to Western Financials and select the Expense Reimbursement Tab
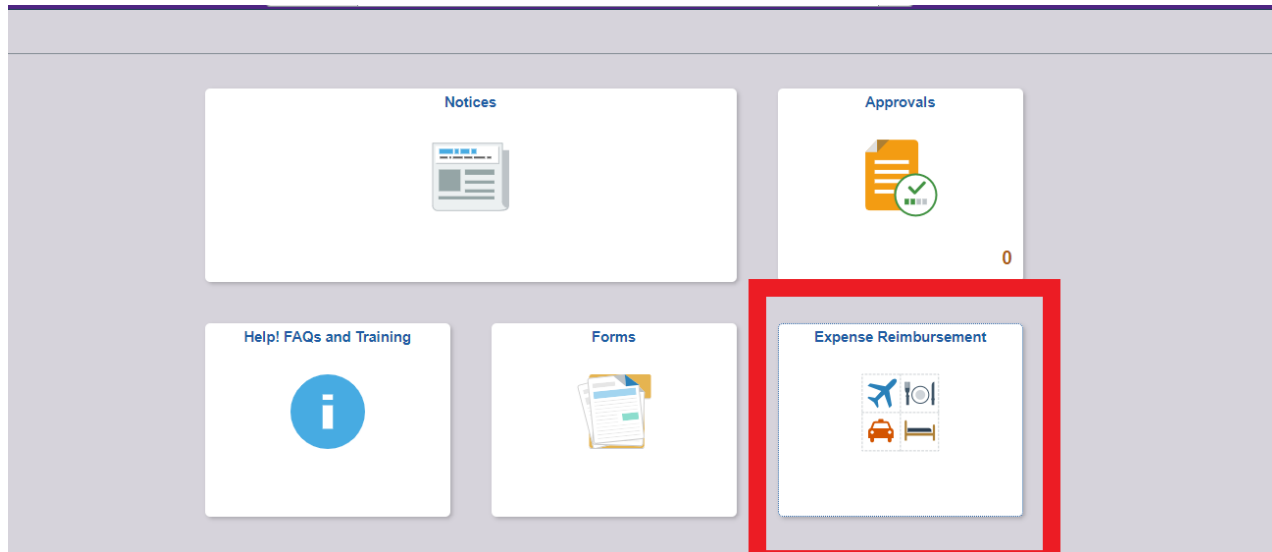
Expense Reimbursement Tips

- Conference and workshop registration costs cannot be claimed until after the date of the event

- Proof of Attendance (attendance email, screenshot of itinerary with your name on it, conference slides, etc.) is required for reimbursement. This includes Virtual Events.

- For Research Travel (non-conference) details such as: purpose of travel, where it was, who it was with should be included in the claim's notes.

- Western reimburses the most economical means of travel between air, rail, and vehicle. The option that provides best value for money will be reimbursed.

Expense Reimbursement Tips

- Purchasing supplies or equipment?
  - The approved method is through Mustang Market or by using a Purchasing Card (PCard).

- Employees may purchase equipment (up to $2,000) or supplies (up to $500) personally and submit such expenses for reimbursement in the following situations only:
  - when the item is needed while the claimant is away from the University on a field trip, at a conference, or other professional meeting
  - when it is more economical or practical purchase the item personally considering all costs and time constraints
  - where the supplier does not accept the Western PCard or other form of payment offered by the University.

Expense Reimbursement Tips

- Claiming fuel or driving distance? Use Google Maps to show distance and route to support this claim.

- If you have charges in a foreign currency, entering the amount in that currency will have it automatically exchanged in accordance with the date entered. Alternatively, you can claim in CAD and provide a proof of exchange (bank statement).

- <u>Per Diem Rates:</u>

	Canada (CAD)		United States (USD)		Outside North America (CAD)	
	1-30 days	31+ days	1-30 days	31+ days	1-30 days	31+ days
Breakfast	$15.00	$11.25	$15.00	$11.25	$17.00	$12.75
Lunch	$20.00	$15.00	$20.00	$15.00	$28.00	$21.00
Dinner	$30.00	$22.50	$30.00	$22.50	$40.00	$30.00
Daily Maximum	$65.00	$48.75	$65.00	$48.75	$85.00	$63.75

Questions?

Thank you!