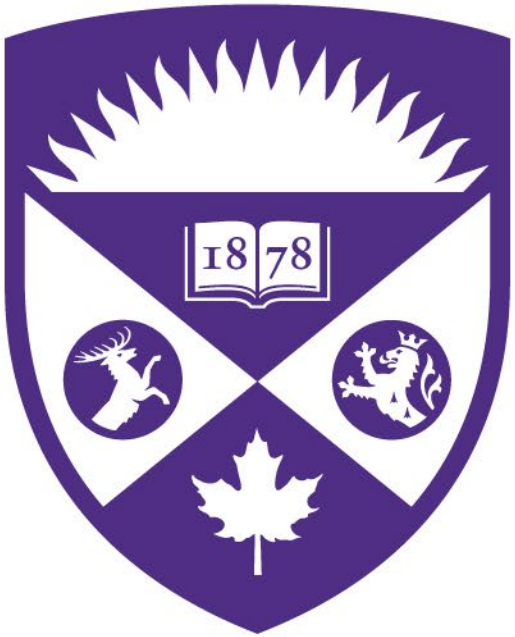


Western

UNIVERSITY · CANADA

Human Resources & Research Financials Workshop

Western Education

Today's Agenda

- 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 Information

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

WR INTERNAL RESEARCH PROGRAMS - FRDF | EDUCATION - 2025/2026 OPEN COMPETITION

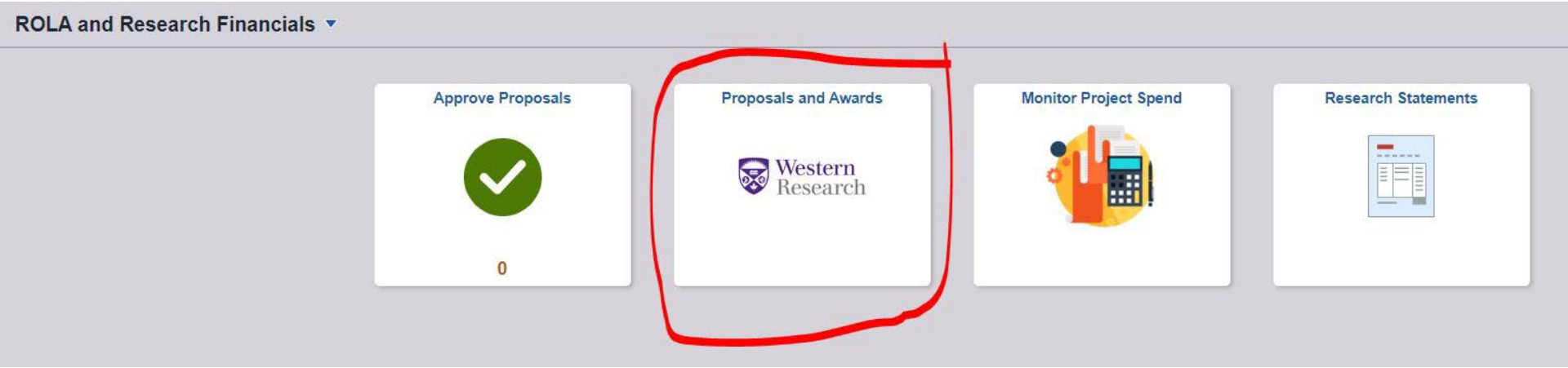
Competition Details

Share ROLA

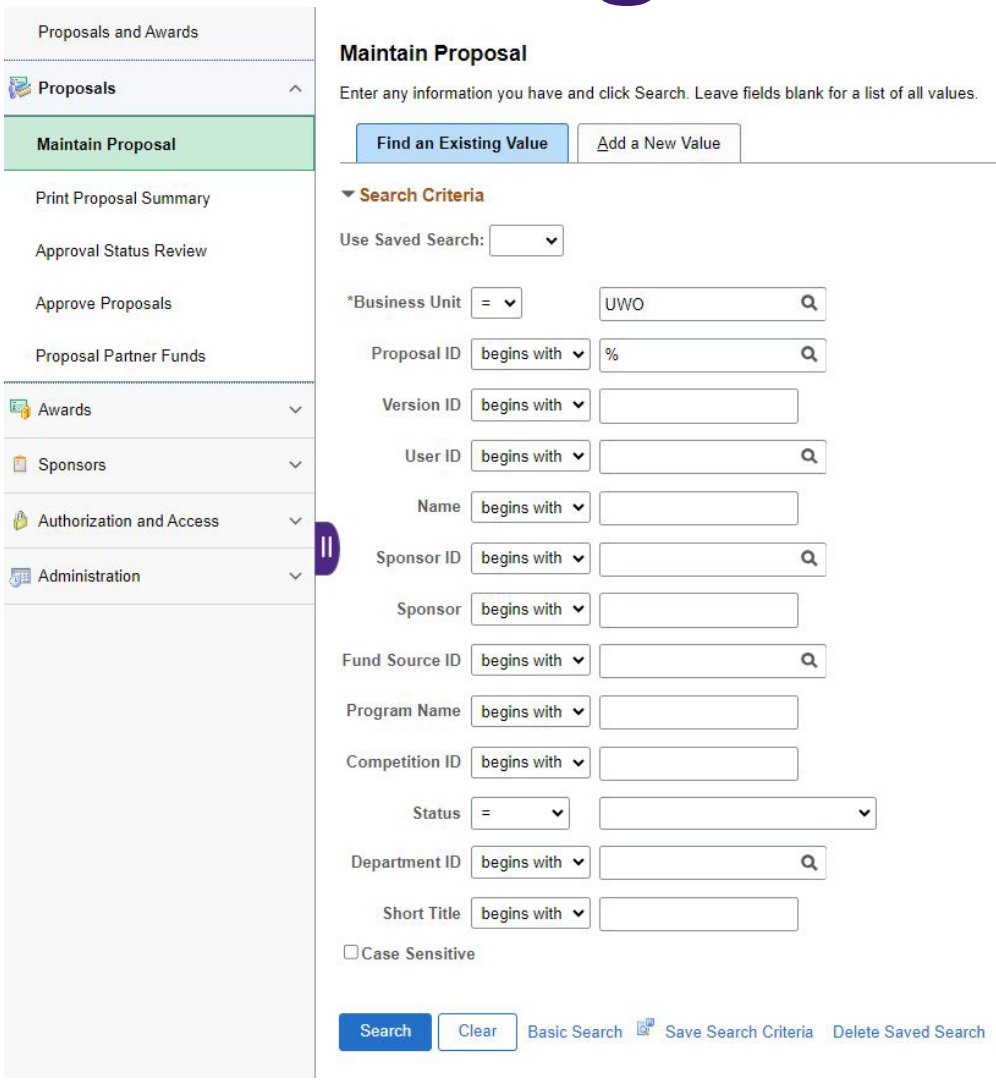
Sponsor:	WR INTERNAL RESEARCH PROGRAMS
Program:	FRDF | EDUCATION
Award Amount:	N/A
Matching Funds:	N/A
Institutional Contribution:	N/A
Type:	Letter of Intent
Number of Grants:	No Restriction
Research Area(s):	N/A
WR Internal Deadline:	Rolling
Competition Deadline:	Rolling

Getting to your ROLA

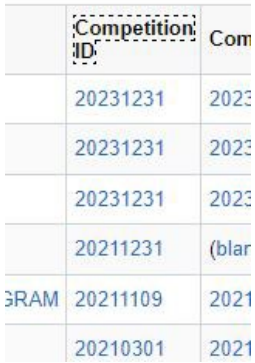
- We have a step-by-step guide for creation of that new proposal on our site here (its easy!)
- For in-progress proposals, navigate to Western Financials and use the search menu:



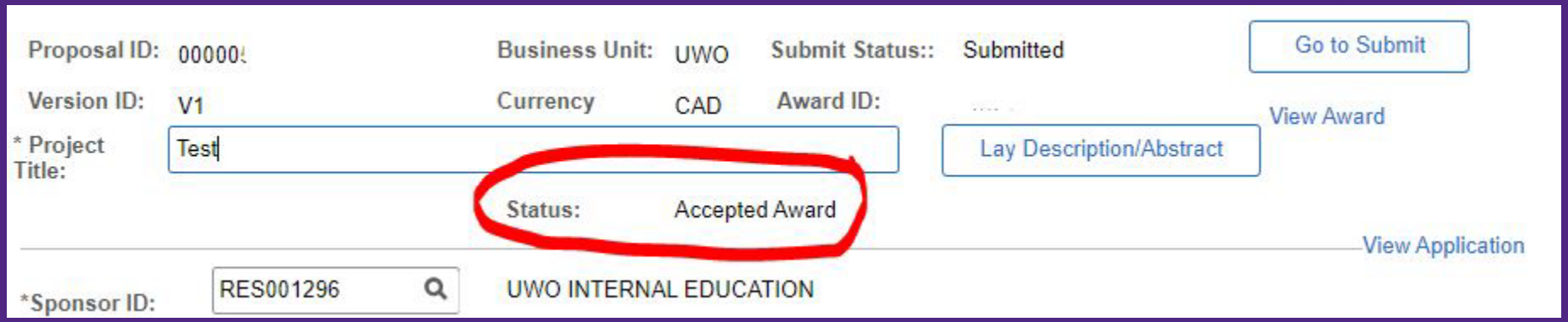
Searching…



- 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



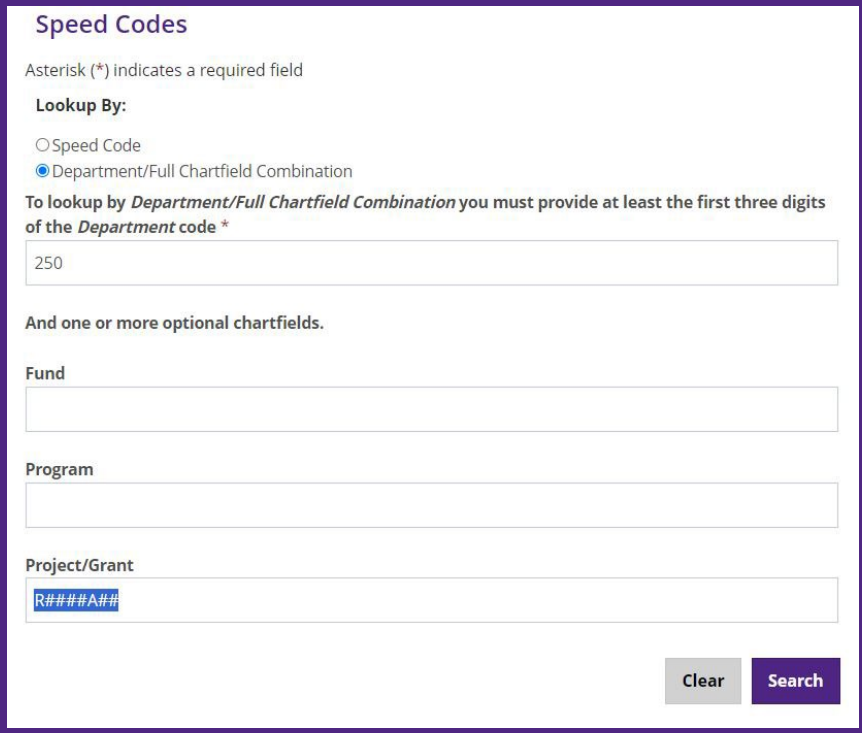
- **Draft** -- not submitted – still working on it
- **Pending Approval** -- somewhere in the approval queue; go to Approval Status Review
- **Institution Approved** -- proposal is through the approval stage and waiting for results
- **Awarded** -- proposal has been awarded by agency, an award has been 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.

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.

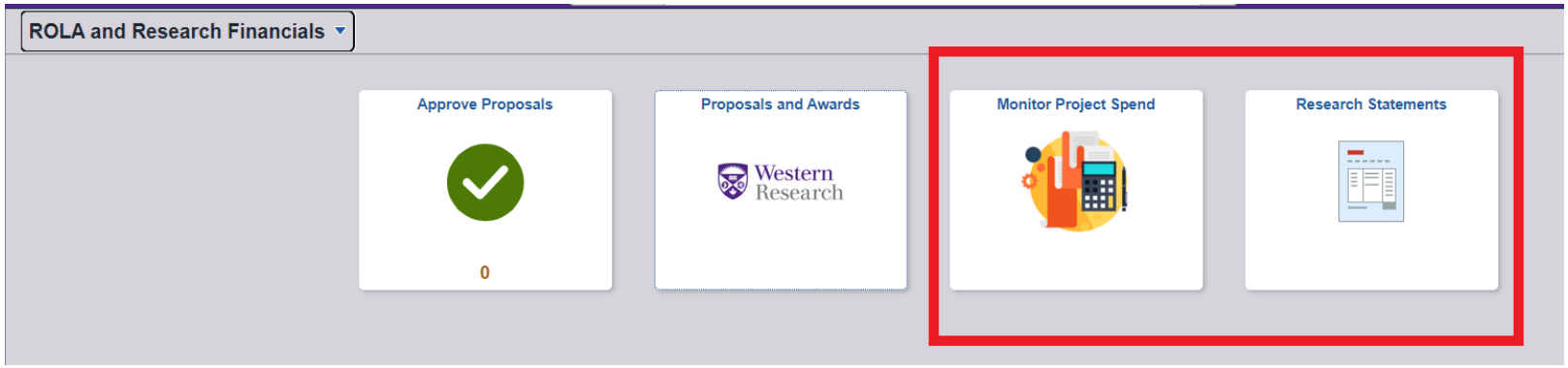
Speedcode Check

- **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!

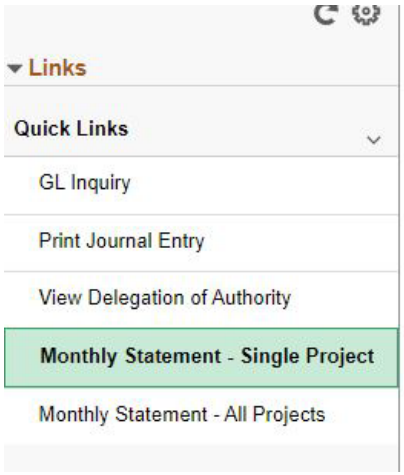


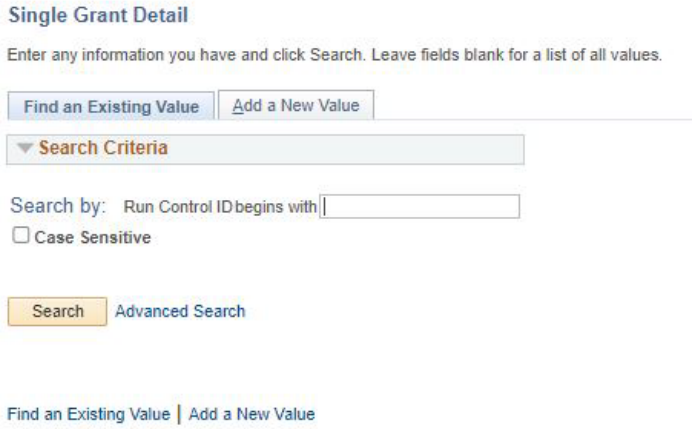
Monthly Spend Reports

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



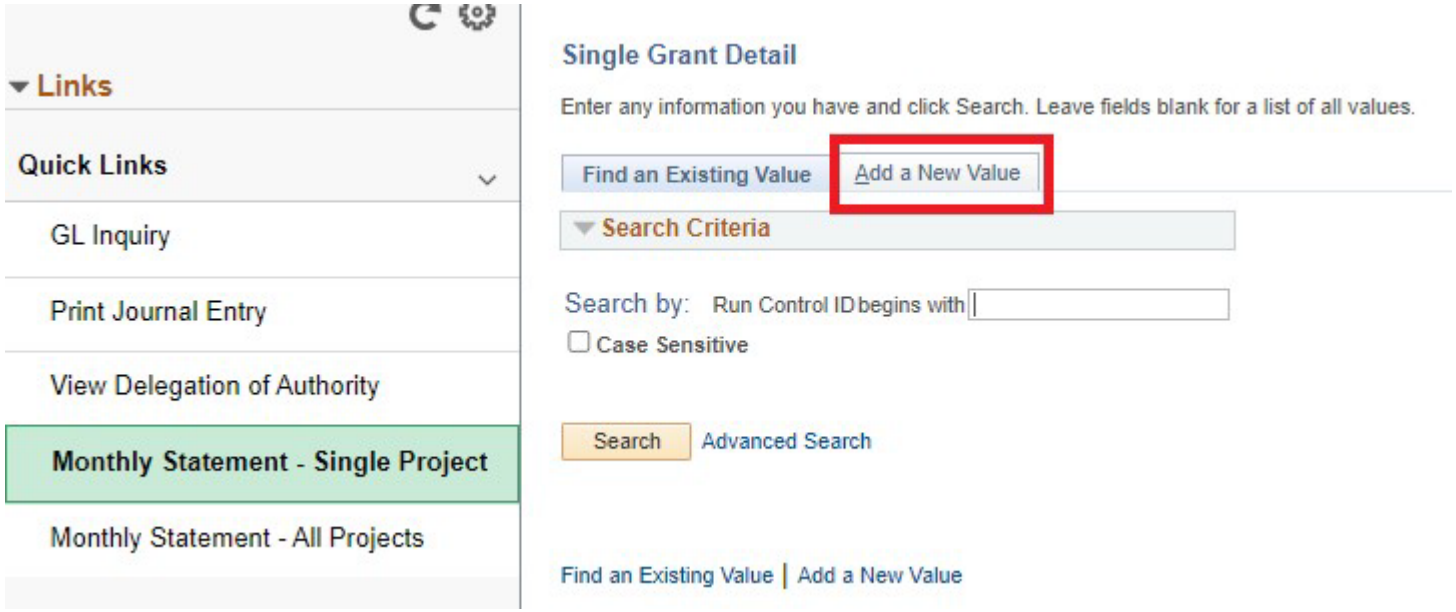
Select "Single Project" for spending from one award, "All Projects" if you want to see all your grants and the Money used/remaining





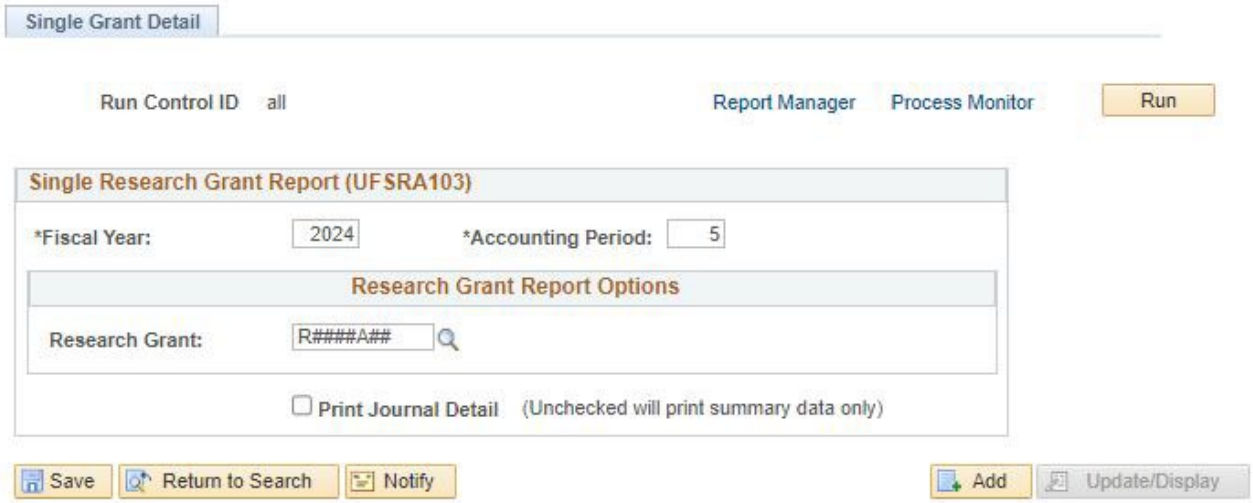
Spend Reports Cont'd

- 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")

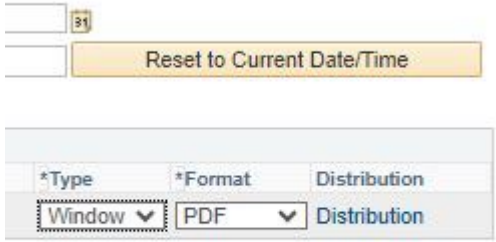


Spend Reports Cont'd

- 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)



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



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 Matthew Eberhard: meberhar@uwo.ca

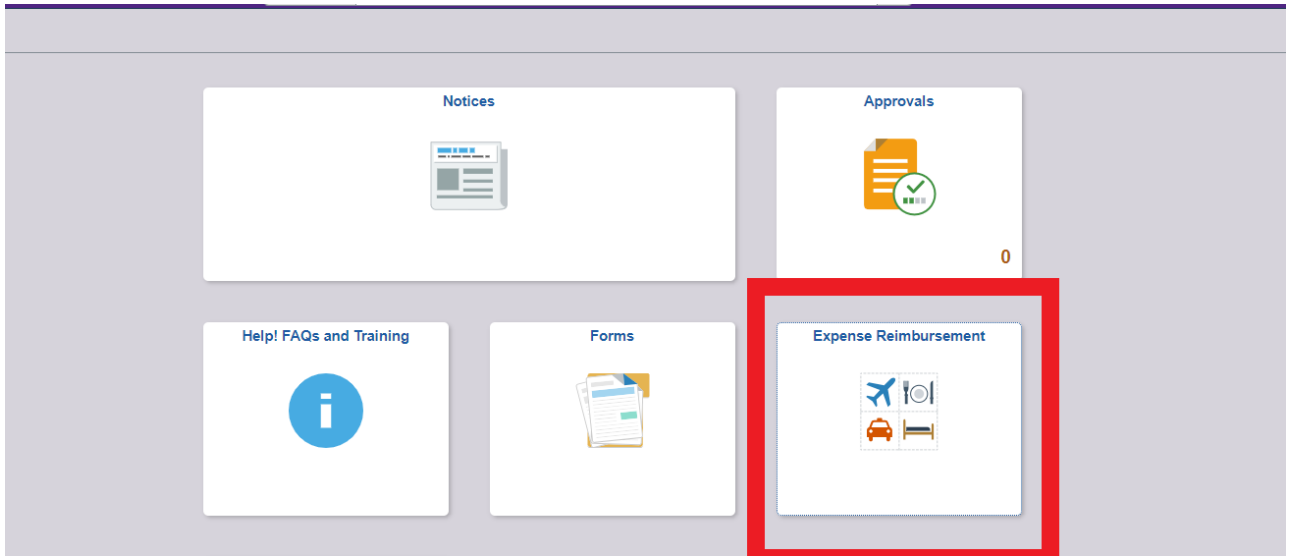
Questions?



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>

	Travel in Canada	Travel in the USA	Travel outside of North America
Breakfast	$15 CAD	$15 USD	$17 CAD
Lunch	$20 CAD	$20 USD	$28 CAD
Dinner	$30 CAD	$30 USD	$40 CAD
Daily Maximum	**$65 CAD**	**$65 USD**	**$85 CAD**

Questions?

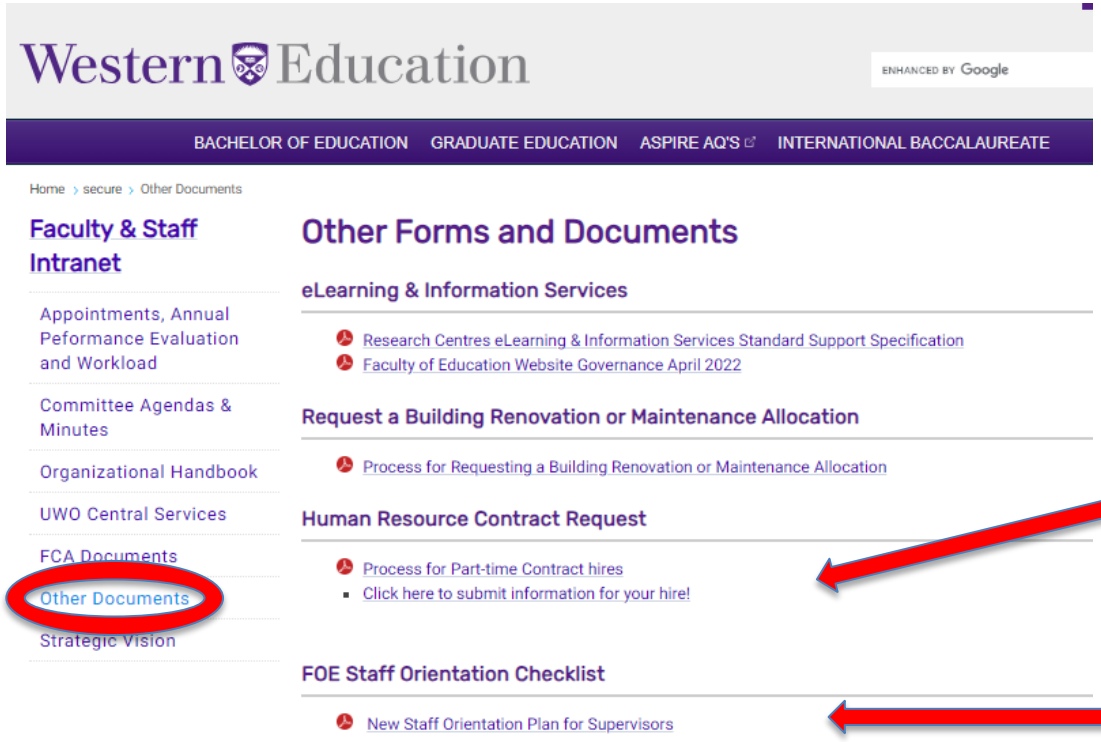


Human Resources

Guidelines for Hiring Students & Staff

HR: Documentation and Resources

Available on our website in the Staff/Faculty 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!

HR: Supervisor Responsibilities

As the direct supervisor of a staff or student employee, it is your responsibility to:

- Provide training, leadership and guidance throughout the duration of the contract.
- Ensure that the assigned workload is reflective of weekly working hours.
- Ensure that there are sufficient funds to cover the full cost of the contract.
- **Know when their contract starts and ends**. Under no circumstances can staff or students work without an active, signed contract.
- Submit the hiring form to request changes to an active contract, or to report a leave or resignation.

HR: Student vs. Staff Positions

Student Positions	Staff Positions
• Must be an actively enrolled Western student or a recent graduate • Can be directly appointed (no job posting) • Position and pay are defined by student status • Graduate students can only be hired on a term-by-term basis • Graduate students can only work a cumulative 20 hours per week https://www.uwo.ca/hr/admin/form_doc/references/student_res_appointments.pdf	• Open to anyone, students included • Must be appointed through Working @ Western (job posting required) • Position and pay are defined by job duties and education/experience requirements • Contracts do not need to follow the academic calendar • Work can be part-time or full-time https://www.uwo.ca/hr/admin/form_doc/part_time/job_codes.pdf

- Contracts should be at least 8 weeks in duration. Staff Relations approval is required for a shorter contract.
- We cannot offer rates of pay that fall outside of the determined range for a role.
- Contract hours can be standard or variable (standard preferred).

HR: Budgeting & Funding

You are financially responsible for your own hires.

- **No speedcode = no hire.** We require a valid and active speedcode(s) with sufficient funds to process a hire request. You can use up to 3 different accounts to fund a hire.
- When budgeting for a hire, **you need to account for 4% vacation pay and a 14% benefit recovery rate.**
    - Ex. If your hire is offered $33.75/hour, your account will be billed $40.01/hour.

Best Pay Practices:

- Employees being reappointed to the same position are eligible for a 2% pay increase per contract year.
    - Pay increases cannot include "catch up" to account for years in which no raise was provided.
- Pay should reflect skill required, not skill possessed.
- The wage range for **Graduate Student Assistants** is $26.50 - $45 per hour.
    - Our recommended rate for PhD students is $33.75 per hour.

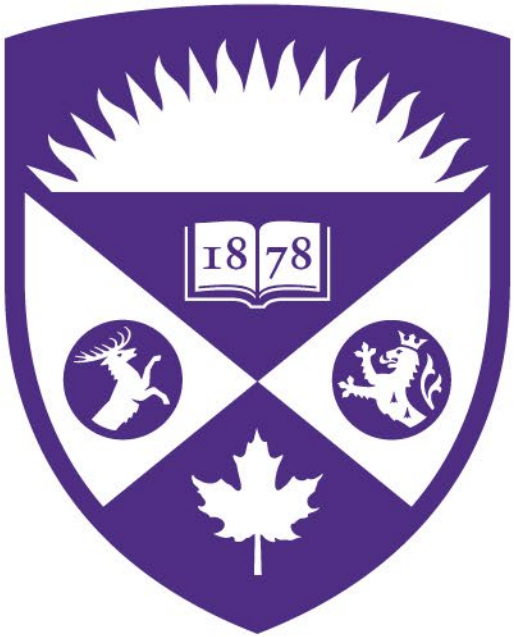
HR: After the Hire!

- 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!
- Please use the form to inform us of any leaves or resignations, or to request a change in contractual terms.
- Ensure you are checking in with your hire regularly, so absences and other issues are addressed.
- If your hire needs a workspace, please submit a request for a desk in the Education Research Commons (1190): Education Research Commons Workstation Request Form – Fill out form
- Contact edu-staffrelations@uwo.ca with any questions.

Questions?



Thank you!



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