



Researchers' Guide to Financial  
Statement Approval

# FDSR SYSTEM



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## Purpose and Scope:

### **FDSR = Financial Data Submission and Reconciliation**

- Annual Financial Statements must be prepared, submitted and approved for all active Federal Grants.
- Financial Statements are submitted on-line by Financial Services/Restricted Funds
- Financial Statements are approved on-line by the grant holder.

<https://eservices.nserc.gc.ca/fdsr-prdf/>

# First Time Users

- If you are a new *researcher*, you must create a User ID and Password by selecting *Researcher Account Registration* found on the Login Page.
- FDSR will display the Researcher Legal Acceptance page.
- Read the text that is displayed on this page. If you agree, click I Accept and select Continue.
- FDSR will display the Account Registration – Step 1 page.
- Select Concordia University in the Select your institution box.
- Complete the required fields. Select create to create your account if you wish to continue the registration process. FDSR will display the Account Registration – Step 2 page.
- Select Cancel if you do not want to complete the registration process.
- Take note of your User ID. You will require this ID EVERY YEAR of your grant to access the FDSR system.
- Select Continue . FDSR will display the Link Grant to User Account page found on page 5 of this guide.

# About your CID/PIN

- This is your personal identification number that was assigned to you by the granting agency when you applied for the grant; it is the same identifier you used to access the agency's on-line application system. The PIN may also be shown on your notice of award.
- A CID (Council Identification Number) is assigned by SSHRC.
- A PIN (Personal Identification Number) is assigned by NSERC and CIHR.
- If you hold grants with more than one granting agency, you will have a different CID/PIN for each granting agency.
- If you hold multiple grants with one granting agency, you will have one CID/PIN for all the grants from that agency.
- The CID/PIN you enter in this field must be identical to the CID/PIN that the Business Officer has entered in the *Council/Personal Identification No. (CID/PIN)* field when creating the Form 300 for this specific grant.

# FDSR Welcome

 Government of Canada / Gouvernement du Canada



**Welcome | Bienvenue**

Financial Data Submission and Reconciliation System (FDSR) / Système de présentation et de rapprochement des données financières (PRDF)

English

[Important Notices](#)


Français

[Avis importants](#)


Canada

- <https://eservices.nserc.gc.ca/fdsr-prdf/>
- Select **Language** to begin your session.

# FDSR Introduction:

 Canadian Institutes of Health Research  
Natural Sciences and Engineering Research Council of Canada  
Social Sciences and Humanities Research Council of Canada

Instituts de recherche en santé du Canada  
Conseil de recherches en sciences naturelles et en génie du Canada  
Conseil de recherches en sciences humaines du Canada



**Financial Data Submission and Reconciliation System**

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[Introduction to the FDSR On-line System >](#)

[Login](#)

**Home**

**Instructions**

Frequently Asked Questions

**My Account**

FDSR version 4.07

**Proactive Disclosure**

Proactive Disclosure

**Introduction to the FDSR On-line System**

**NEW** Select [User Help](#) to obtain more information on the FDSR on-line system.

The Financial Data Submission and Reconciliation (FDSR) System aims to provide university officials with the capability to electronically transmit their annual financial data to the three federal granting agencies (CIHR, NSERC and SSHRC) by means of a single Web-enabled interface.

[Login](#)

Updated :2008-06-23

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[Important Notices](#)

- Click on “Login” to Continue

# FDSR Login



Canadian Institutes  
of Health Research  
Natural Sciences and Engineering  
Research Council of Canada  
Social Sciences and Humanities  
Research Council of Canada

Instituts de recherche  
en santé du Canada  
Conseil de recherches en sciences  
naturelles et en génie du Canada  
Conseil de recherches en  
sciences humaines du Canada

Canada

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[Proactive Disclosure](#)

## Login

[Login](#)

NEW Select [User Help](#) to obtain more information on the FDSR on-line system.

Enter your User ID and Password to access your account.  
The current session timeout is set at 60 minutes of inactivity. Your session will expire and you will be required to login again.

User ID:

Password:

If you are a researcher, you must create a User ID and Password by selecting [Researcher Account Registration](#).

[Researcher Account Registration](#)

- USER ID: enter your user ID
- Password: enter your password
- Select "Login"
- Please refer to pages 9-12 inclusive of this presentation if you need help with your userid, password, CID or PIN



# Form 300 Approval

The screenshot displays the FDSR website interface. At the top, a dark banner contains the title "Financial Data Submission and Reconciliation System". Below this is a navigation bar with links for "Français", "Home", "Contact Us", "Help", "Search", and "canada.gc.ca". A "Form 300 Approval >" link is visible in the top left, and a "Logout" link is in the top right. A left-hand menu includes "Home", "Instructions", "Frequently Asked Questions", "My Account", "Change Password", "FDSR version 4.07", "Proactive Disclosure", and "Proactive Disclosure". The main content area is titled "Form 300 Approval" and contains a "NEW" notice: "Select [User Help](#) to obtain more information on the FDSR on-line system." Below this, a message states: "You currently do not have Form 300 information associated to this account. Please select [Link Another Grant](#)." The text "Total Records : 0" is displayed. A "Link Another Grant" button with a plus icon is present. A note at the bottom of the content area reads: "Note: To read the PDF version, you need Adobe Reader® on your system. If the Adobe® download site is not accessible to you, you can download Acrobat Reader® from an accessible page. If the accessibility of PDF is a concern, you can have the file converted to HTML or ASCII text by using one of the access services provided by Adobe®." The footer includes "Updated : 2008-06-23", a "Top of Page" link with an upward arrow, and "Important Notices".

- Select “Link Another Grant” to access Form 300
- If you have more than one grant with the same agency, you must “Link Another Grant” for all your active grants

# Link Grant to User Account

Canadian Institutes of Health Research  
Natural Sciences and Engineering Research Council of Canada  
Social Sciences and Humanities Research Council of Canada

Instituts de recherche en santé du Canada  
Conseil de recherches en sciences naturelles et en génie du Canada  
Conseil de recherches en sciences humaines du Canada

Canada

**Financial Data Submission and Reconciliation System**

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[Link Grant to User Account >](#) [Logout](#)

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Change Password  
FDSR version 4.07  
**Proactive Disclosure**  
Proactive Disclosure

## Link Grant to User Account

New Select [User Help](#) to obtain more information on the FDSR on-line system.

In order to approve financial data for your grant and to link the grant to your user account, you must first provide the following information:

CIP/PIN:

Grant#:

Granting agency:

Year ending:

- 1. Enter your PIN
- 2. Enter your grant XXX-XXXX-XXX
- 3. Enter granting agency CIHR, NSERC or SSHRC (drop down menu)
- 4. Year ending: fiscal year end reported (example: enter "2009" for March 31 2009)
- 5. Click on "Link" to complete the process
- The information must match that of the agency, otherwise it will not link the grant successfully and will display an error message.

# Link Grant to User Account - Identification

Canadian Institutes of Health Research  
Natural Sciences and Engineering Research Council of Canada  
Social Sciences and Humanities Research Council of Canada

Instituts de recherche en santé du Canada  
Conseil de recherches en sciences naturelles et en génie du Canada  
Conseil de recherches en sciences humaines du Canada

Canada

## Financial Data Submission and Reconciliation System

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[Link Grant to User Account >](#)

[Logout](#)

- Home
- Instructions
- Frequently Asked Questions
- My Account
  - Change Password
  - FDSR version 4.07
- Proactive Disclosure
  - Proactive Disclosure

### Link Grant to User Account

NEW Select [User Help](#) to obtain more information on the FDSR on-line system.

In order to approve financial data for your grant and to link the grant to your user account, you must first provide the following information:

The Form 300 record has been successfully linked. [Continue](#)

CIP/PIN:

Grant#:

Granting agency:

Year ending:

- Once the Form has been successfully linked to the grant, click on “Continue”

# Form 300 Approval – view and approve

**Financial Data Submission and Reconciliation System**

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[Form 300 Approval >](#) [Logout](#)

**Home**

**Instructions**

Frequently Asked Questions

**My Account**

Change Password

FDSR version 4.07

**Proactive Disclosure**

Proactive Disclosure

## Form 300 Approval

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InEW Select [User Help](#) to obtain more information on the FDSR on-line system.

After viewing a particular form, you may approve it by selecting the appropriate "Approved?" checkbox.

By selecting **Save**, the corresponding information will be made available to your Business Officer for final approval. This is equivalent to your signing the form and forwarding it to the Business Officer.

To link another grant to your account, select **Link Another Grant**.

**Note:** If more than one record is displayed, select a column header to sort the displayed data according to that particular criterion.

Total Records : 1

Name	CID/PIN	Granting agency	View	Approved?	Year Ending	Grant No.	Res. Approval Date
				<input type="checkbox"/>			

**Save** 
**Link Another Grant**

- Select "View" to display the Form 300 of your grant. You must review the statement before approving it.
- If there are no corrections to be made, select "Approved?"
- Select "Save" to complete the approval process. You will be able to see the date and time that you approved your statement.
- If there are corrections to be made, do not approve and contact your Restricted Funds Financial Officer for further instructions.

# Change/Reset your Password

- If you have forgotten your Password, you may change/reset a new one.
- From your Login Page, select Forgot Password. FDSR will display the Forgot Password – Step 1 page.
- Enter your User ID.
- Select Continue.
- FDSR will display the Forgot Password- Step 2 page.
- Please answer the authentication question displayed on the FDSR form.
- Enter your new password. Your Password must consist of 8 to 12 characters and include at least one alphabetic character and one numeric character.
- Confirm your New Password.
- Select Update Password.

## Additional Information

- You will find a link for Frequently Asked Questions (FAQ) on the Welcome page.
- If you have forgotten your USER ID, you must contact the FDSR Helpdesk by telephone or by e-mail.
- The Helpdesk's telephone number is (613 995-4273 or by email at [webapp@nserc.ca](mailto:webapp@nserc.ca).



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