



Office of Research

## Request to Transfer Funds to Co-Investigator

Available for download online at <http://www.concordia.ca/research/for-researchers/grants.html>

### 1. Concordia Grant Holder

|            |             |
|------------|-------------|
| Name:      |             |
| Title:     | Department: |
| Telephone: | E-mail:     |

### 2. Project Details

|  |  |                              |                                |
|--|--|------------------------------|--------------------------------|
| Funds are from:  | <input type="checkbox"/> Tri-Agency (SSHRC, NSERC or CIHR) | <input type="checkbox"/> FRQ | <input type="checkbox"/> Other |
| Agency/Sponsor Name:                                       |  |                              |                                |
| Concordia (ConRAD) Project Account Number: 3 0 0 _ _ _ _ _ |  |                              |                                |
| Project Title:   |  |                              |                                |
|  |  |                              |                                |

### 3. Co-Investigator and Recipient Institution

|   |                |
|---|----------------|
| Co-Investigator Institution:  |                |
| Name:   | Title:         |
| Department:   |                |
| Total Transfer Amount (include currency):   | Budget period: |
| Is the Co-Investigator named in your grant application? <input type="checkbox"/> Yes <input type="checkbox"/> No* |                |

\*Co-Investigators receiving grant funds must be named in the project. For help adding a Co-Investigator, email [grant-transfers@concordia.ca](mailto:grant-transfers@concordia.ca).

### 4. Budget Breakdown

Provide a breakdown of the funds to be transferred in the adjacent budget table.

*Note: items must adhere to sponsor guidelines and approved use of funds. Consult the applicable sponsor guidelines. For example, the [Tri-Agency Financial Administration Guide](#) (SSHRC, NSERC, CIHR) or the [Common General Rules](#) (FRQ).*

|                           |  |
|---------------------------|--|
| Salary and Benefits       |  |
| Travel                    |  |
| Material and Supplies     |  |
| Computers and Electronics |  |
| Publication               |  |
| Equipment                 |  |
| Services                  |  |
| Other specify:            |  |
| <b>Total</b>              |  |

### 5. Submit to Office of Research

- **Complete, sign, scan and send this form and**
- **Send a signed Payment Requisition form (see instructions on Page 2).**

*Transfer of Funds Agreements normally take approximately two weeks to initiate, and up to two weeks to a month longer to complete. Longer processing times will result from factors such as complexity, completeness of information, and response time of all parties involved (recipient institution and Concordia University researchers, administrators).*

*Please let your Co-Investigator know they may need to complete necessary forms as required by the recipient institution in order to receive the transfer, including relevant applicable certificates i.e. Research Involving Human Subjects, Animal Care, Biohazard.*

\_\_\_\_\_  
Researcher Signature

\_\_\_\_\_  
Date

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### Online Payment Requisition Instructions

1. Log in to Concordia.ca
2. Visit: <https://hub.concordia.ca/carrefour/services/financial/forms-resources.html>
3. Choose Accounts Payable and Select Online Payment Requisition
4. Fill in the following mandatory fields
  - a. **Payee:** The Institution where the funds are going (Please do not input your Co-Investigator's name here. Doing so can lead to processing delays.)
  - b. **Address:** The Institution where the funds are going
  - c. **Reason for Payment:** *Transfer of Funds* (After *Transfer of Funds* you may specify the Co-Investigator's name in brackets if you wish)
  - d. **Fund:** Your UNITY Grant # / Cost Object IO#
  - e. **Account:** 77130 (This will signal to Research Funds an inter-institutional transfer of funds)
  - f. **Method of Payment:** Wire Transfer (as of March 2020 we have NOT been using cheques for Canadian institutions until further notice)
5. Click **Submit**

Please note: At this point the Payment Requisition form doesn't actually *go* anywhere; however, once it has been "submitted" you will see that the button changes to **Download pdf**.
6. Download the Payment Requisition pdf to your computer before sending via e-mail to [grant-transfers@concordia.ca](mailto:grant-transfers@concordia.ca) with the request to transfer funds form.
7. It is important to check your institutional email, as **UNITY will now send a separate confirmation email which you must click to Approve**. Without this, your transfer will remain pending indefinitely.

For questions or concerns related to Payment Requisition forms for Transfer of Funds Agreements, please contact:

NSERC, CIHR

Mike Guadagno Lead, Research Grants: [michael.guadagno@concordia.ca](mailto:michael.guadagno@concordia.ca)

SSHRC, FRQS, FRQNT, FRSQC

Jamara Chazin, Coordinator, Research Grants : [tamara.chazin@concordia.ca](mailto:tamara.chazin@concordia.ca)