

Memo

To: All Concordia Researchers

cc: Associate Deans of Research, Faculty Financial Officers, Director VPRGS Sector, VP Research and Grad Studies,
Faculty Deans, Deputy Provost and Vice-Provost, Faculty Development, and Inclusion, Chief Financial Officer, Assoc VP Fin & Controller.

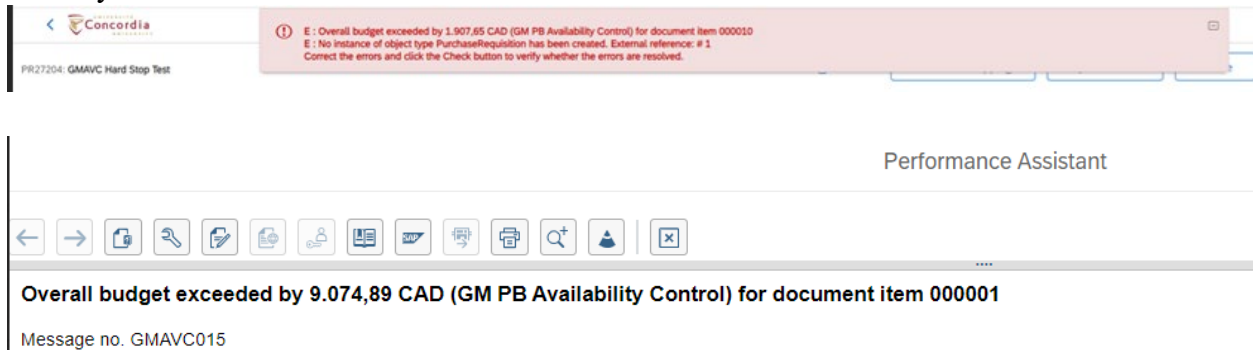
From: Angela Luciano, Director Research and Restricted Financial Management (RRFM)
Marcel Blais, Director, Payroll Services, Human Resources

Date: June 11th, 2024

Re: **Fund Balance Availability Check & Empath Commitments Launching Summer 2024**

ABOUT FUND BALANCE AVAILABILITY CHECKING IN UNITY:

We are pleased to announce, starting this summer the Fund Balance Availability Check (FBAC) functionality will be turned on in Unity. This system functionality is a feature which will serve the research community with a tool to prevent overspending on grants. This functionality will be very similar to the NSF (non-sufficient funds) feature which was part of the Banner environment. This tool will verify a transaction, prior to posting it to your grant, to assess if there is enough money available to cover the expense. If there isn't enough balance available, the expense will be rejected. The expense will be rejected once 100% of the budget is consumed. Below are some examples of the error message that will appear when a transaction fails due to insufficient funds in Unity is:



We are launching this feature in a phased in approach to ensure a smooth transition. When we go live with this functionality, only TRI AGENCY GRANTS will be validated for available

funds. We will continue to add on other sponsors as the year goes forward. If you have a grant from one of the TRI AGENCY sponsors below, the FBAC will be in effect pursuant to the below dates.

The below list of Tri Agency sponsors and the dates when we will turn on FBAC feature.

List of Sponsors:

CIHR: CANADIAN INSTITUTES OF HEALTH RESEARCH-July 2nd

NSERC: NATURAL SCIENCES AND ENGINEERING-August 19th

SSHRC: SOCIAL SCIENCES AND HUMANITIES RESEARCH-August 19th

TIPS: THE TRI-AGENCY INSTITUTIONAL PROGRAMS SECRETARIAT-August 19th

CRC: CANADA RESEARCH CHAIRS SECRETARIAT-August 19th

(Note 1) This would also include funding sent from other institutions originating from any of the tri agency sponsors listed above.

ABOUT EMPATH-BURSARY, FELLOWSHIPS AND SCHOLARSHIPS COMMITMENTS:

Effective with the posting date June 13th, 2024 (pay period 24) all bursaries, fellowships and scholarships will be captured as commitments (also referred to as 'fund reservations') and will be deducted from your available balance. This means your available balance will be more reflective of your true balance available for spending. This important improvement will bring back to the research community a system feature to prevent overspending. The commitments column text will display the same information accessible as the actual's postings, i.e. the week of posting, the student's name and document number.

As a reminder, please ensure the internal order to charge indicated on the bursary, fellowship or scholarships forms is clearly indicated.

How the FBAC will work is - when an expense will be submitted for processing, if the expense item is greater than the available balance on the grant, the FBAC will reject the transaction and the expense will not be processed or paid out. It is the grant owner's responsibility to ensure the grant has enough money to cover all expenses being charged. **Please note as empath and salary charges are contracted to the individual, they will be processed and paid.**

We encourage all members charging research grants to regularly verify their grants balances on their researcher dashboard for up-to-date reporting details.

Information Session

Information session will be offered to answer any questions you may have about FBAC and

EMPATH-BURSARY-FELLOWSHIPS AND SCHOLARSHIPS commitments. Details of dates and times will be emailed shortly.

For any inquiries, we encourage you to reach out to a member of the Research and Restricted Financial Management Team (RRFM) team for additional information.

<https://www.concordia.ca/financial-services/departments/restricted-funds/contacts-area.html>

In case you need resolutions for any urgent matter on your research grants, please do not hesitate to reach out to me or my leadership team:

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[We wish you a good summer and look forward to hearing any feedback from you concerning these new features.](#)

Thank you,

Angela Luciano

Angela Luciano, CPA, CMA

Director, Research and Restricted Financial Management, Financial Services

Marcel Blais

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Director, Payroll Services, Human Resources