

UNIVERSITY OF TORONTO  
DIVISION OF THE VICE-PRESIDENT,  
RESEARCH & INNOVATION

# **MY RESEARCH FUNDS (MRF)**

## **USER GUIDE**

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## About

This user guide is intended for users who have view access to My Research Funds (MRF) and the University of Toronto Research Account (UTRAC). Users include Researchers (Principal Investigators), Business Officers, Project Managers, Unit Heads (and Unit Head Alternate Approvers), and Divisional Research Services Officers. For a full list of roles and instructions on how to obtain access to MRF, see [Appendix A](#).

## Acronyms

Acronym	Full Name
Co-I	Co-Investigator
FIS	Financial Information System
HRIS	Human Resources Information System
MRF	My Research Funds
PI	Principal Investigator
RIS	Research Information System
U of T	University of Toronto
UTRAC	University of Toronto Research Account
VPRI	Division of the Vice-President, Research & Innovation

## What is My Research Funds?

My Research Funds (MRF) is an online interface to U of T's Research Information System (RIS) and Financial Information System (FIS) and provides researchers, project managers, divisional administrators, and VPRI administrators with role-based access to key research funding information, including terms and conditions for awarded applications, financial account details, and funding history.

## What is University of Toronto Research Account?

University of Toronto Research Account (UTRAC) is the successor to the Funded Research Digest (FReD). UTRAC is a record of the terms and conditions of a research award and is available to researchers and their project managers, business officers, and VPRI administrators. UTRAC provides information about budget installments, eligible and ineligible expenses, project and financial deliverables, and other terms and conditions related to the research award.

## Technical Support

For technical questions and troubleshooting, contact the Help Desk. The Help Desk will be staffed from 9:00 a.m. to 5:00 p.m. Monday to Friday with extended hours prior to major deadlines.

**Phone:** 416 946-5000

**Email:** [raise@utoronto.ca](mailto:raise@utoronto.ca)

## Research Award Support

For inquiries related to your funded research award, including questions about the content of the UTRAC, contact with **Research Officer** designated on your UTRAC by e-mail, phone, or by using the built-in [contact form](#).

## Browsers Supported

- Chrome
- Microsoft Edge
- Firefox
- Safari

**Pop-ups must be enabled for the site.**

## System Access

**Important Note:** Depending on your role, you may or may not have been assigned access to different My Research systems. For further details on how to obtain access, see [Appendix A](#).

My Research Funds (MRF) can be accessed from the [My Research \(MR\) platform](#). Your UTORid and Password are used to access MR.

MRF is available from 4:00 a.m. to 1:00 a.m.

Standard UTORMFA rules apply.

To access UTRAC, in the upper navigation menu click on the **My Research** tile, then the **Research Funds** menu option.



This will display a Home page that contains tiles that open different reports and tools in RIS, FIS, and HRIS. The tiles that are displayed in your view can vary depending on your role.

To view a list of UTRACs, click on the tile labelled **My UTRACs** (if you are a Researcher) or **My Unit's UTRACs** (if you are a Departmental or Divisional Administrator, Business Officer, or Unit Head).



## UTRAC Search List

Users can access a list of UTRACs from the UTRAC Search List.

U of T Research Award Details (8)					
UTRAC No.	Lead Researcher	Title / RIS Application #	Sponsor	Program	Fund Center
72068263	Dr Agnus Day	Test (000000)	Social Sciences & Humanities (300002)	Insight Development Grant (20009732)	Day (000000)
Fund Center:	Day (000000)	Status:	Published	<a href="#">Show Details</a> <a href="#">Edit</a>	

### 1 Filter Header

The following search and filter fields will be displayed by default in the filter header. Additional filters can be added or existing filters hidden using the **Adapt filters** button (see #3).

- **Search** (marked A on image): This is a general search field that will perform a keyword search on **all** fields.
- **UTRAC No:** Number assigned on creation of UTRAC.
- **Program:** The program number under which the Sponsor will fund the research. To search by program name, click the  (double box) and use the program name field.
- **RIS Application #:** Unique identifier to the application assigned in RIS.

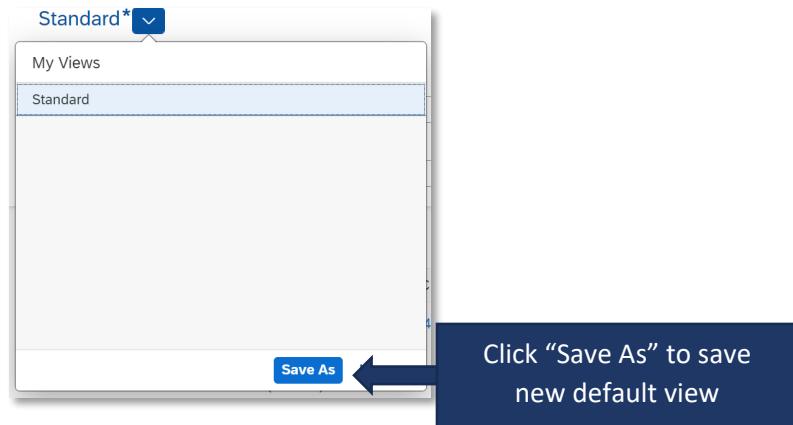
- **Sponsor:** The sponsor number for the agency, organization, or company that is funding the research. To search by sponsor name, click the  (double box) and use the sponsor name field.
- **Fund No:** Fund number assigned in FIS.
- **Lead PI Funds Center:** Funds Center corresponding to the primary researcher.
- **Is Master:**
  - i. Select Yes for UTRACs where the *Sponsor* is providing funding for multiple projects under a master agreement.
  - ii. Select No for UTRACs that are not a master agreement.

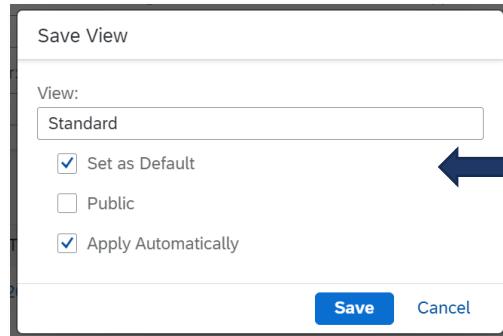
To set the filter parameters for each field click the advanced search  (double box) in the search field. For details on using advanced search, see the [Advanced Search](#) section.

- 2 **Go button:** After entering search terms, click the Go button.
- 3 **Adapt filters:** Add additional filters or remove listed filters.

- 4 **Research Award Details Table – Options**

- 5 **Settings:** Add additional columns or remove listed columns. Users can also shuffle the order of the columns using the arrow buttons 
- 6 **Show/Hide Details:** Show/Hide additional filters selected from the Settings button.
- 7 **Export:** Export UTRAC search results as an Excel file.
- 8 **My Views:** Users can personalize their own search filters and save them as a default view. To add/remove search filters, see # 3.





Enter new name for view.  
Click "Set as Default" &  
"Apply Automatically".

### ⑨ Research Award Details Table – Content Area

Once you have set your search parameters and select "Go", the search results will display in the content area of the Research Award Details table. Once you have found the UTRAC you are interested in, you can access the Summary Screen for the UTRAC or open the UTRAC to view its contents.

Click anywhere in the row  
to open the Summary  
Screen.

9 UTRAC No.	Lead Researcher	Title / RIS Application #
72065496	Prof David	McLean Award (222981)

Click the UTRAC number to open and view UTRAC details.

Click anywhere in the row to open the Summary Screen.

72065496  
McLean Award

Research Award Details Versions

**General Details** A

Lead Researcher Name: Prof David

RIS Application #: McLean Award (222981)

Sponsor: Connaught Fund (300743)

Program: McLean Award (20002842)

**Document Details** B

Created By: Anju M

Created At: Jul 7, 2022, 9:46:20 AM

Changed By: Anju M

Changed At: Nov 1, 2023, 4:15:39 PM

**Versions** C

Search Show Details F E D

Version	Version Type	Published	Published Date	Approved Amount	Grant From Date
1	Original	Yes	Jul 7, 2022	125,000.00 CAD	Jul 1, 2022

Grant To Date: Jun 30, 2029  
Sponsor Reference: MCLEAN-2021-22

Click on the arrow to open the version.

## Summary Screen

### A General Details

- **Lead Researcher Name:** Name of the lead Researcher who is responsible for carrying out the funded research project.
- **RIS Application #:** Unique identifier to the application assigned in RIS.
- **Sponsor:** The sponsor number for the agency, organization, or company that is funding the research.
- **Program:** The program number under which the Sponsor will fund the research

### B Document Details

- **Created By:** Name of Research Officer who created the UTRAC.
- **Created At:** Date when the UTRAC was created.
- **Changed By:** Name of Research Officer who last modified the UTRAC.
- **Changed At:** Date when the UTRAC was last modified.

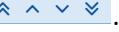
### C Versions

- **Version:** Version number (e.g. 1, 2, 3, etc.)
- **Version Type:**
  - i. Original: First published version of UTRAC.

ii. Revision: Revised version of the original UTRAC.

- **Published:**
  - i. Yes: This version is published.
  - ii. No: This version is not yet published; it is of Draft status and is being edited by the Research Officer.
- **Published Date:** Date this version was published by the Research Officer.

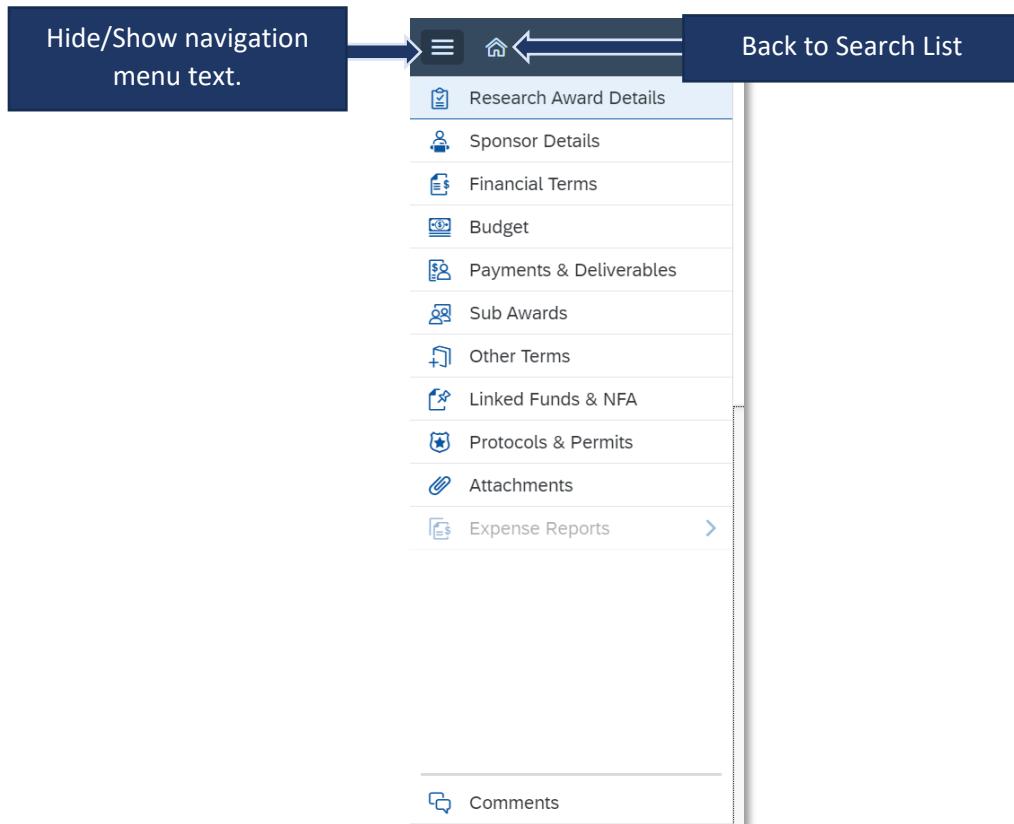
**D** **Export:** Export version table as Excel file.

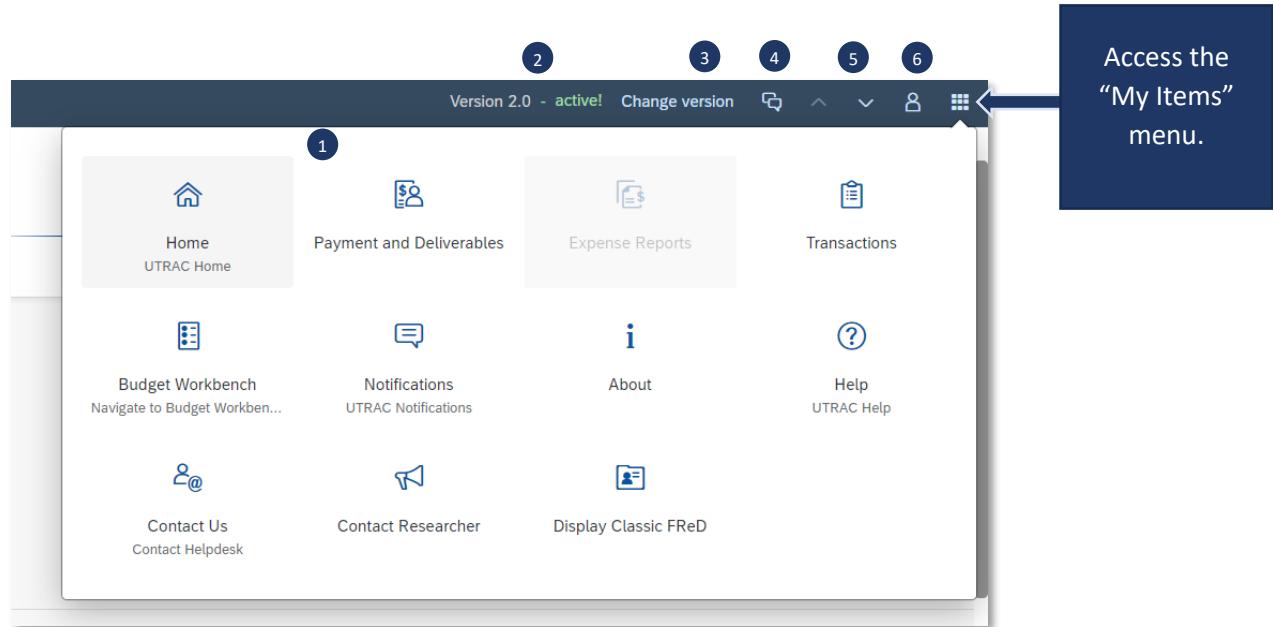
**E** **Settings:** Add additional columns or remove listed columns. Users can also shuffle the order of the columns  . Settings will be saved to the user's saved view (see #8 – My Views).

**F** **Show/Hide Details:** Show/Hide additional filters selected from the Settings button.

## Navigation

Users can navigate through each UTRAC section from the navigation menu on the left-hand side. To move through the sections, click on the name of the section.





**1 My Items menu**

- **Home:** Return to UTRAC Search List
- **Payment & Deliverables:** Shortcut to the Payments & Deliverables section.
- **Expense Reports:** Not currently active; coming soon (Phase 2 of MRF)
- **Transactions:** Shortcut to the transactions page where users can access tools like the Budget Workbench, etc.
- **Notifications:** History of emails sent through the built-in contact forms, categorized by role.
- **About:** Links to the [MRF Initiative webpage](#).
- **Help:** Links to user documentation on the [MRF webpage](#).
- **Contact Us:** Contact the Help Desk using the built-in contact form.
- **Contact Researcher:** Contact the primary researcher using the built-in contact form.
- **Display Classic FReD:** Displays UTRAC in classic (legacy) FReD format. Note that linked protocols & permits, linked UTRACs, detailed contact information, document attachments, and some other functions will not be displayed in Classic FReD.

**2 Version:** Displays the current UTRAC version you are viewing. Versions labeled “active!” are the most recent versions.

**3 Change version:** Jump to a different UTRAC version (if there are multiple versions).

**4 Contact Us:** Shortcut list of available contacts that you can connect with through the built-in contact forms. For details on how to use the contact forms, see [Contact Forms](#) section.

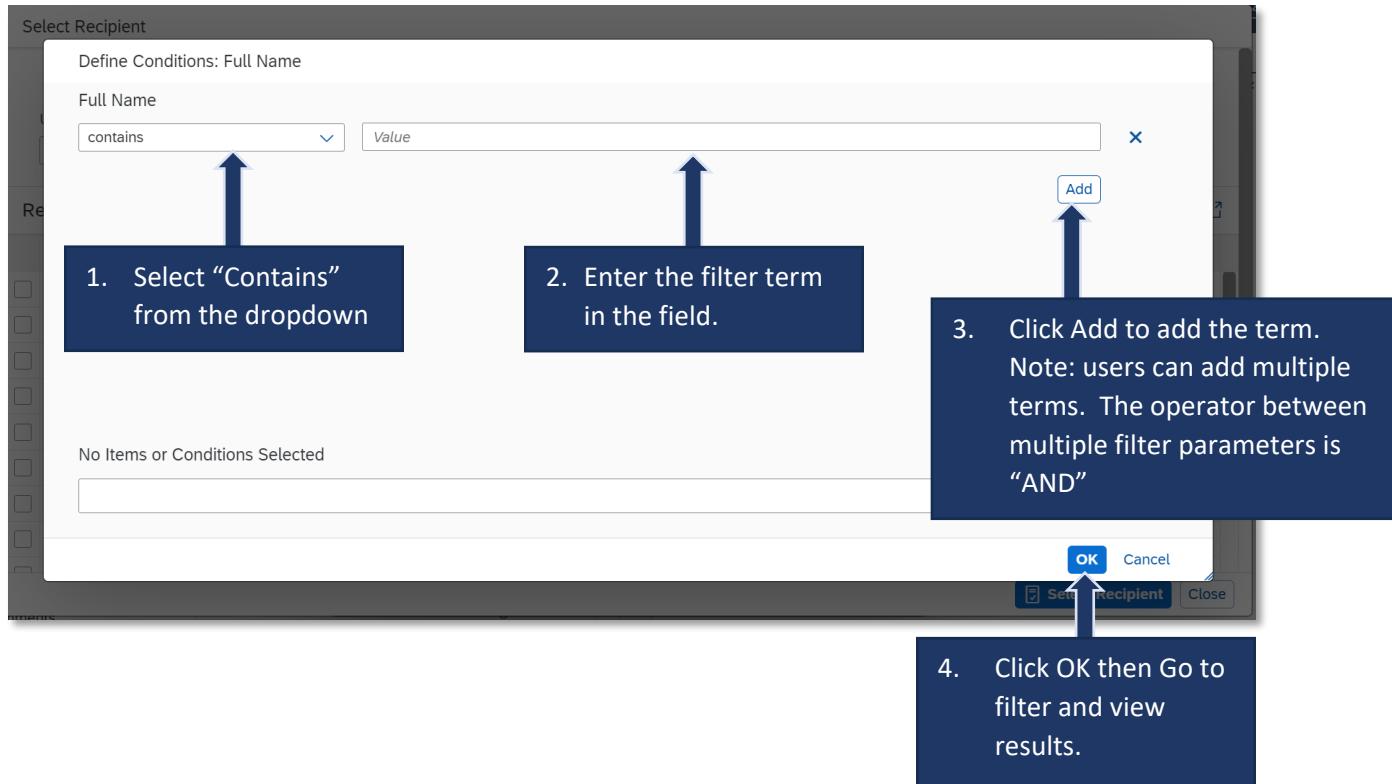
**5 Previous Page/ Next Page:** Navigate through each UTRAC section by going to the next/previous page using the arrows.

**6 UTRAC Profile:** Summary information for this UTRAC including Fund & Grant Periods, Sponsor, Program, Location, and more.

## Advanced Filter

With the exception of **Search** on the Filter Header, all filter fields in UTRAC are case sensitive by default. Users will need to enter the exact value to find a match. For example, if a user wants to find results using the term “University of Toronto”, they will need to type the string in full, including the correct capitalization.

To filter on a term using part of the term and without capitalization, users should access the advanced filter by clicking the  (double box) in the filter field and use the “Contains” operator on their term.



## Header

Every page in UTRAC has the Header containing the key information labeled below.

72068809 / 1 / Research Award Details  
test

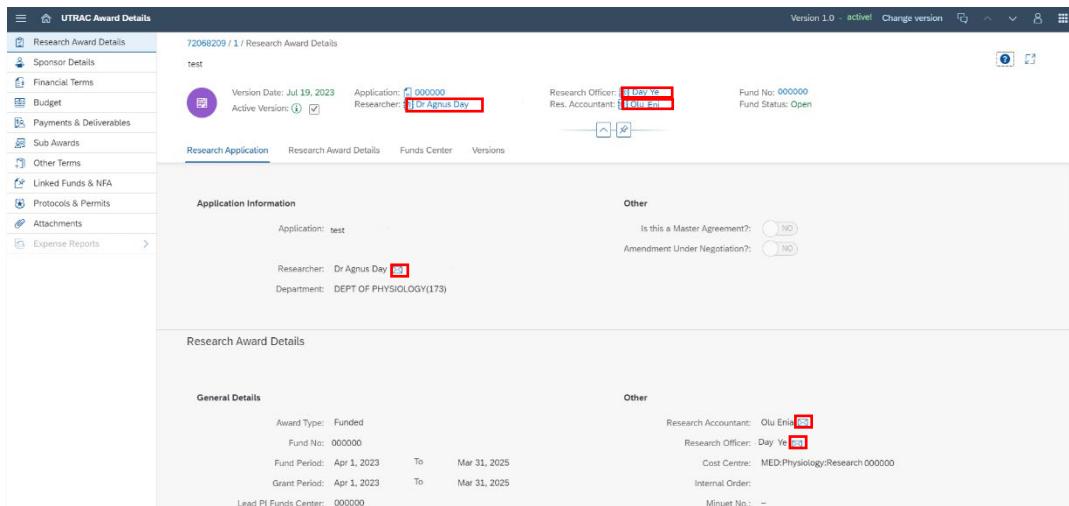
Version Date: Oct 30, 2023 Application: 231519  
Active Version: Yes Researcher: Agnus Day  
Research Officer: Ye Res. Accountant: OluO  
Fund No: 517929  
Fund Status: Open

- **UTRAC No.:** Unique identifier assigned on creation of UTRAC.
- **Version Date:** Date for which this version was created.
- **Active Version:**
  - Yes: The UTRAC the user is viewing is the latest and active version.
  - No: The UTRAC the user is viewing is not an active version and there is a newer version available.
- **Fund No:** Fund number assigned in FIS.
- **Fund Status:**
  - **Open:** Fund is currently open; i.e. the current date is between the Fund Start and Fund End Date. Eligible expenditures can be incurred on the fund.
  - **Closed:** Fund End Date is in the past and no more expenditures can be incurred on the fund.
  - **Inactive:** Fund End Date is in the past and the fund has been closed out. The fund can no longer be extended.
  - **Not Yet Opened:** The fund has been created by the Fund Start Date is in the future. Eligible expenditures cannot yet be incurred on the fund.
  - **No Post:** Expenditures have been blocked on the fund due to a compliance issue or other reason. For details, see [Appendix B](#).
- **Application:** RIS application record
- **Researcher:** Name of the primary researcher on this research project
- **Research Officer:** Name of the VPRI Research Officer who authorized the release of the UTRAC.
- **Research Accountant:** Name of the VPRI Research Accountant assigned to this UTRAC.

## Contact Forms

Users can contact the primary Researcher, VPRI Research Officer, and/or VPRI Research Accountant directly within UTRAC using the built-in contact forms.

1. To access the forms and contact a specific role, you can click on any of the highlighted sections in the image below.



UTRAC Award Details

72068209 / 1 / Research Award Details

test

Version Date: Jul 19, 2023 Application: 000000  
Active Version: 1 ✓ Researcher: Dr Agnus Day

Research Officer: Day Ye Res. Accountant: Olu Eni Fund No: 000000 Fund Status: Open

Research Application Research Award Details Funds Center Versions

**Application Information**

Application: test

Researcher: Dr Agnus Day

Department: DEPT OF PHYSIOLOGY(173)

**Research Award Details**

**General Details**

Award Type: Funded Fund No: 000000

Fund Period: Apr 1, 2023 To Mar 31, 2025

Grant Period: Apr 1, 2023 To Mar 31, 2025

Lead PI Funds Center: 000000

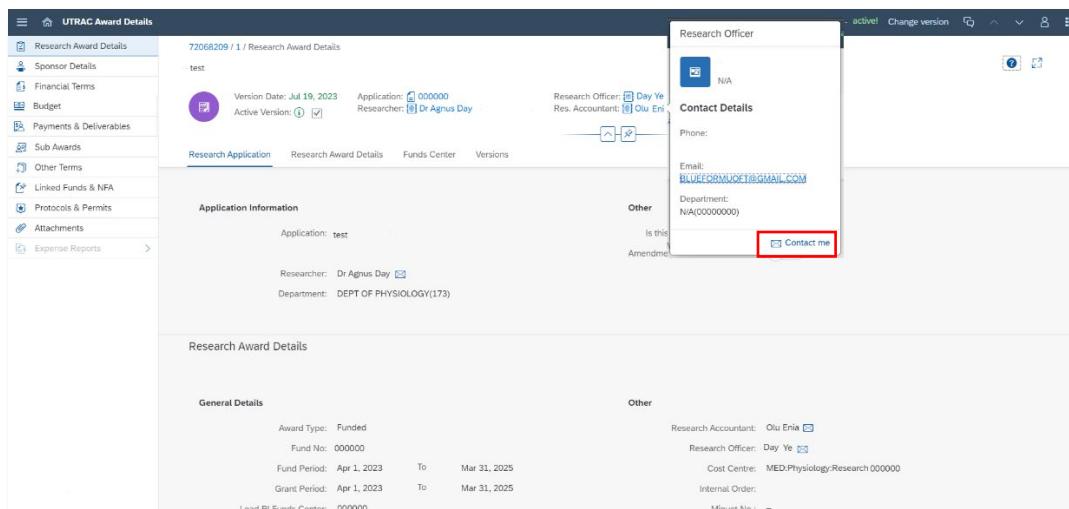
**Other**

Research Accountant: Olu Eni Research Officer: Day Ye Cost Centre: MED:Physiology:Research 000000 Internal Order: Minut No.: -

Is this a Master Agreement?:  NO  YES

Amendment Under Negotiation?:  NO  YES

2. A box with the contact details (phone number, email, department) will appear. Click the "Contact me" button in the right corner.



UTRAC Award Details

72068209 / 1 / Research Award Details

test

Version Date: Jul 19, 2023 Application: 000000  
Active Version: 1 ✓ Researcher: Dr Agnus Day

Research Officer: Day Ye Res. Accountant: Olu Eni

Research Officer

N/A

**Contact Details**

Phone:

Email: BLUEFGRMUDFT@GMAIL.COM

Department: N/A(00000000)

Is this a Master Agreement?:  NO  YES

Amendment Under Negotiation?:  NO  YES

Contact me

Research Application Research Award Details Funds Center Versions

**Application Information**

Application: test

Researcher: Dr Agnus Day

Department: DEPT OF PHYSIOLOGY(173)

**Research Award Details**

**General Details**

Award Type: Funded Fund No: 000000

Fund Period: Apr 1, 2023 To Mar 31, 2025

Grant Period: Apr 1, 2023 To Mar 31, 2025

Lead PI Funds Center: 000000

**Other**

Research Accountant: Olu Eni Research Officer: Day Ye Cost Centre: MED:Physiology:Research 000000 Internal Order: Minut No.: -

3. A contact form will appear with certain details pre-filled. Fill out the form and click Send.

The screenshot shows a contact form with the following fields and annotations:

- Contact** (Section title)
- Phone:** (Text input field)
- Email:** (Text input field) **BLUEFORMUOFT@GMAIL.COM**
- What would you like to tell Ye ?** (Text area)
- Comments:** (Text area)
- Recipient List** (Section title)
- Add Recipients** (Text) **(Click on '+' to add recipients)**
- ID \*** **Name** **Email**
- Research Officer** **Ye** **BLUEFORMUOFT@GMAIL.COM** **X**
- Send** **Close**

Annotations with arrows:

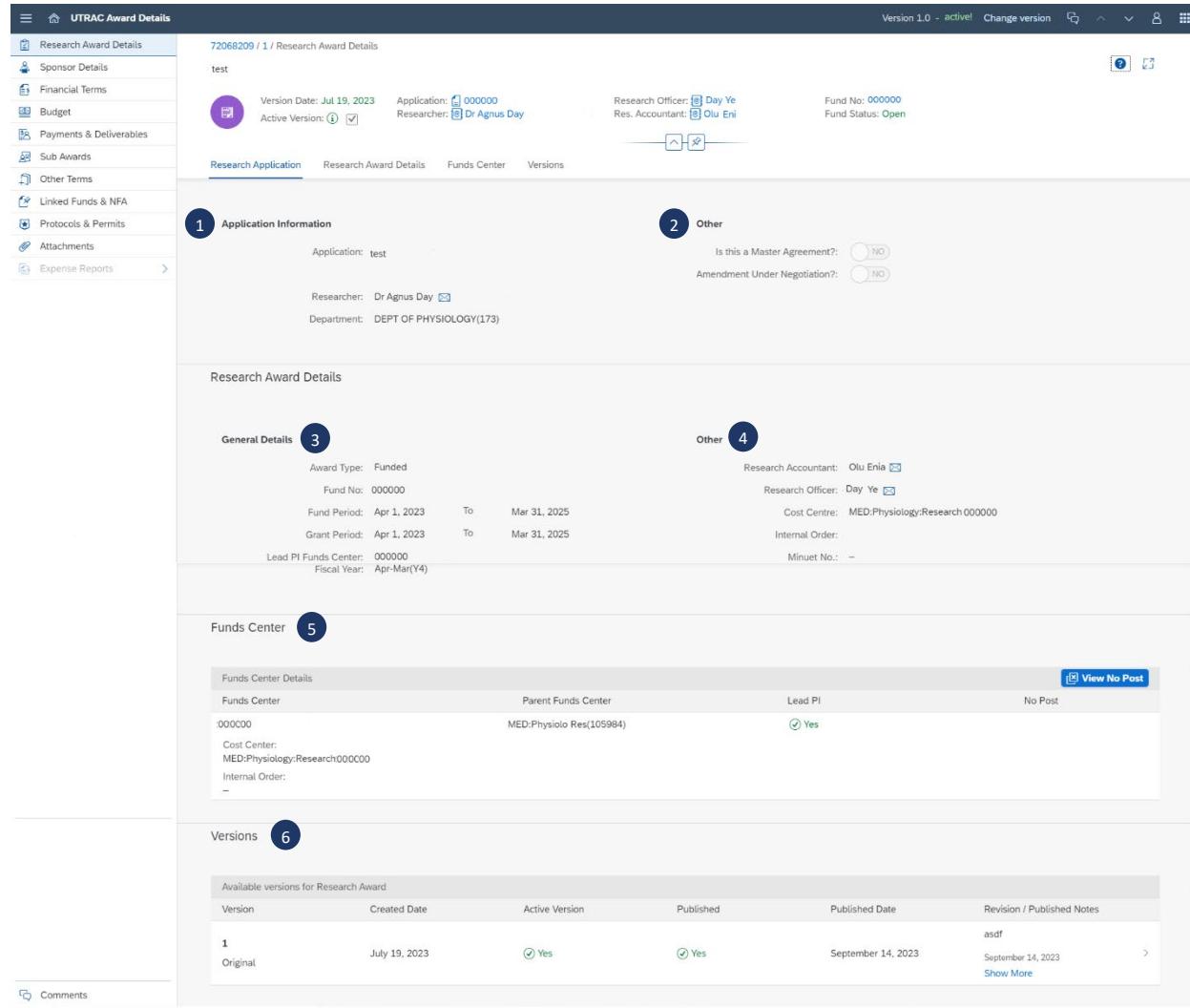
- A blue box on the right says **Write your message or question here.** with an arrow pointing to the text area.
- A blue box on the right says **You can add additional recipients from the “+” icon. For details on how to search, go to [Advanced Filters](#).** with an arrow pointing to the **Add Recipients** button.
- A blue box at the bottom says **Click send to send your message.** with an arrow pointing to the **Send** button.

## How to Read a UTRAC

The following sections outline the content on each page that can be accessed from the left navigation menu.

### Research Award Details Page

This page contains general information about the research award, such as Application information, Grant and Fund Period, Funds Center and Cost Center information, and Version history.



The screenshot shows the UTRAC Award Details page for award 72068209. The left navigation menu includes: Research Award Details (selected), Sponsor Details, Financial Terms, Budget, Payments & Deliverables, Sub Awards, Other Terms, Linked Funds & NFA, Protocols & Permits, Attachments, and Expense Reports.

**Section 1: Application Information**  
Version Date: Jul 19, 2023 Application: 000000 Active Version:  Researcher: Dr Agnus Day Research Officer: Day Ye Res. Accountant: Olu Eni Fund No: 000000 Fund Status: Open

**Section 2: Other**  
Is this a Master Agreement?:  NO Amendment Under Negotiation?:  NO

Researcher: Dr Agnus Day Department: DEPT OF PHYSIOLOGY(173)

**Section 3: General Details**  
Award Type: Funded Fund No: 000000 Fund Period: Apr 1, 2023 To Mar 31, 2025 Grant Period: Apr 1, 2023 To Mar 31, 2025 Lead PI Funds Center: 000000 Fiscal Year: Apr-Mar(Y4)

**Section 4: Other**  
Research Accountant: Olu Enia Research Officer: Day Ye Cost Centre: MED:Physiology:Research 000000 Internal Order: Minuet No.: -

**Section 5: Funds Center**  
Funds Center Details: Funds Center 000000 Parent Funds Center MED:Physio Res(105984) Lead PI Yes Cost Center: MED:Physiology:Research000000 Internal Order: -

**Section 6: Versions**  
Available versions for Research Award:

Version	Created Date	Active Version	Published	Published Date	Revision / Published Notes
1 Original	July 19, 2023	<input checked="" type="checkbox"/> Yes	<input checked="" type="checkbox"/> Yes	September 14, 2023	asdf September 14, 2023 <a href="#">Show More</a>

**Comments**

**1 Application Information**

- **Application:** The title of the research project and the Application Number assigned on entry into RIS.
- **Researcher:** The name of the U of T employee who is the primary Researcher on the application.
- **Department:** The Administering Unit for the fund, as indicated by the Researcher in MRA.

**2 Other**

- **Master Agreement:** In cases where a Sponsor is providing funding for multiple projects under a master agreement, “Yes” indicates whether this UTRAC reflects the master agreement.
- **Amendment Under Negotiation:** Flag indicating whether a project extension is in progress. **“Yes” indicates that** an award is undergoing an amendment process and that the fund end date *may* be extended.

**3 General Details**

- **Award Type:** Indicates whether the UTRAC is for a Funded or Non-Funded Award.
- **Fund No:** FIS number assigned on creation of UTRAC. Budget will be set up and revenue/expenses will be posted to the Fund No. in combination with the PI Funds Center(s).
- **Fund Period:** Award start and end dates, plus any grace period allowed by Sponsor. Includes the entire history of the award -- the original award plus any renewals.
- **Grant Period:** Award start and end dates, usually defined by Sponsor. Refers to only the award period of that application, i.e., ignores originals or renewals, or any grace period.
- **Lead PI Funds Center:** Funds Center corresponding to the primary researcher. This is where budget will be set up and revenue/expenses posted in combination with the Fund No.
- **Fiscal Year:** Sponsor's grant year, e.g. CIHR's grant year is April – March.

**4 Other**

- **Research Accountant:** Name of assigned VPRI Research Accountant
- **Research Officer:** Name of the VPRI Research Officer who authorized the release of the UTRAC.
- **Cost Centre:** Cost center for the organizational unit or program that administers this fund.
- **Internal Order:** Controlling code representing a holding place / cost collector account number. This field is optional and left blank until requested to fill by the departmental Business Officer.
- **Minuet Number:** Identifier number of the corresponding record in the Minuet database. Minuet is an internal database used by the Innovations & Partnerships Office (IPO) at VPRI for tracking funded and non-funded awards, licensing disclosures, etc.

## 5 Funds Center table

This table will list all Funds Centers and their associated information for Researchers who will have budget on this fund in combination with their PI Funds Center.

For example, if the budget is split between the lead Researcher (i.e. Principal Investigator – PI) for the award and two Co-Investigators (Co-Is), the Funds Center information will be listed in this table for the PI and two Co-Is.

- **Funds Center:** Funds Center corresponding to the PI or Co-Is.
- **Cost Center:** See #4 above.
- **Internal Order:** See #4 above.
- **Parent Funds Center:** Departmental funds center hierarchy to which the PI Funds Center belongs.
- **Lead PI:** Designates the lead Researcher (i.e. PI) for cases where there are multiple Co-Is. Only one Researcher can be designated as the Lead PI.
- **No Post:** Indicates whether there is a No Posting status applied to the Fund/Funds Center combination. See [No Post section](#) for more details.

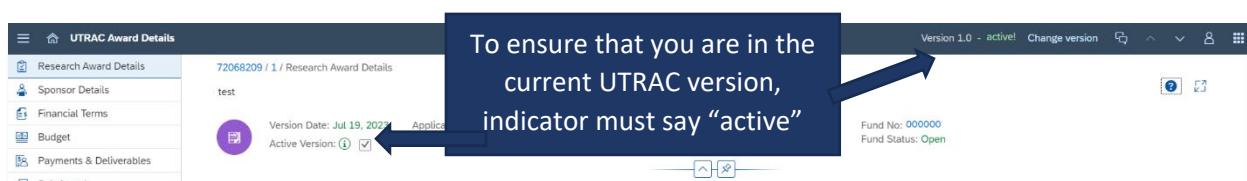
## 6 Versions

This table shows all UTRAC versions created to date, including the following identifying information:

- **Version Number:** Version number for UTRAC; e.g. 1, 2, 3, etc.
- **Created Date:** Date on which the version was created.
- **Active Version:** This field will indicate Yes for the most recent version.
- **Published:** If Yes, this version is published and available to view by the Researcher and Administering Department/Division. If No, this version is a draft and is not published by the Research Officer and cannot be viewed by the Researcher or Administering Department/Division.
- **Published Date:** Date on which the version was published.
- **Revision/Published Notes:** Notes explaining the changes made to UTRAC in that version.

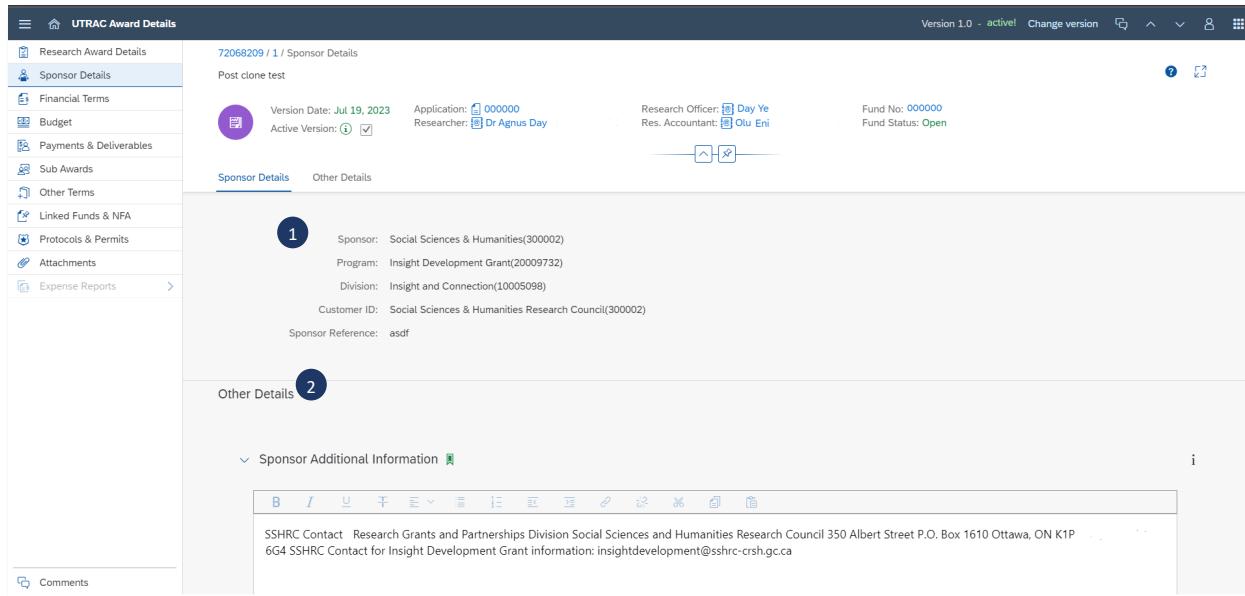
To view a previous version of the UTRAC, click on the row corresponding to that version. This will display the content of the previous UTRAC version.

**Note:** Previous UTRAC versions will contain out-of-date information and should only be used for comparison purposes. To ensure that you are in the current, active version, make sure that the status indicator in the header says “Active”.



## Sponsor Details

This page contains information about the Sponsor providing the funding for the research award, including the Sponsor, Division, and Program names, Sponsor Reference number, and other information such as Sponsor contact details.



The screenshot shows the UTRAC Award Details page for Research Award Details. The left sidebar includes links for Research Award Details, Sponsor Details (selected), Financial Terms, Budget, Payments & Deliverables, Sub Awards, Other Terms, Linked Funds & NPA, Protocols & Permits, Attachments, and Expense Reports. The main content area shows the following details:

- Version Date: Jul 19, 2023
- Application: 000000
- Researcher: Dr Agnus Day
- Research Officer: Day Ye
- Res. Accountant: Olu Eni
- Fund No: 000000
- Fund Status: Open

Below this, the "Sponsor Details" tab is selected, showing:

1. Sponsor: Social Sciences & Humanities(300002)  
Program: Insight Development Grant(20009732)  
Division: Insight and Connection(10005098)  
Customer ID: Social Sciences & Humanities Research Council(300002)  
Sponsor Reference: asdf

Below the "Sponsor Details" tab is the "Other Details" tab, which is currently inactive (indicated by a grey background). The "Sponsor Additional Information" section is expanded, showing:

SSHRC Contact Research Grants and Partnerships Division Social Sciences and Humanities Research Council 350 Albert Street P.O. Box 1610 Ottawa, ON K1P 6G4 SSHRC Contact for Insight Development Grant information: insightdevelopment@sshrc-crsh.gc.ca

### 1 Sponsor Details

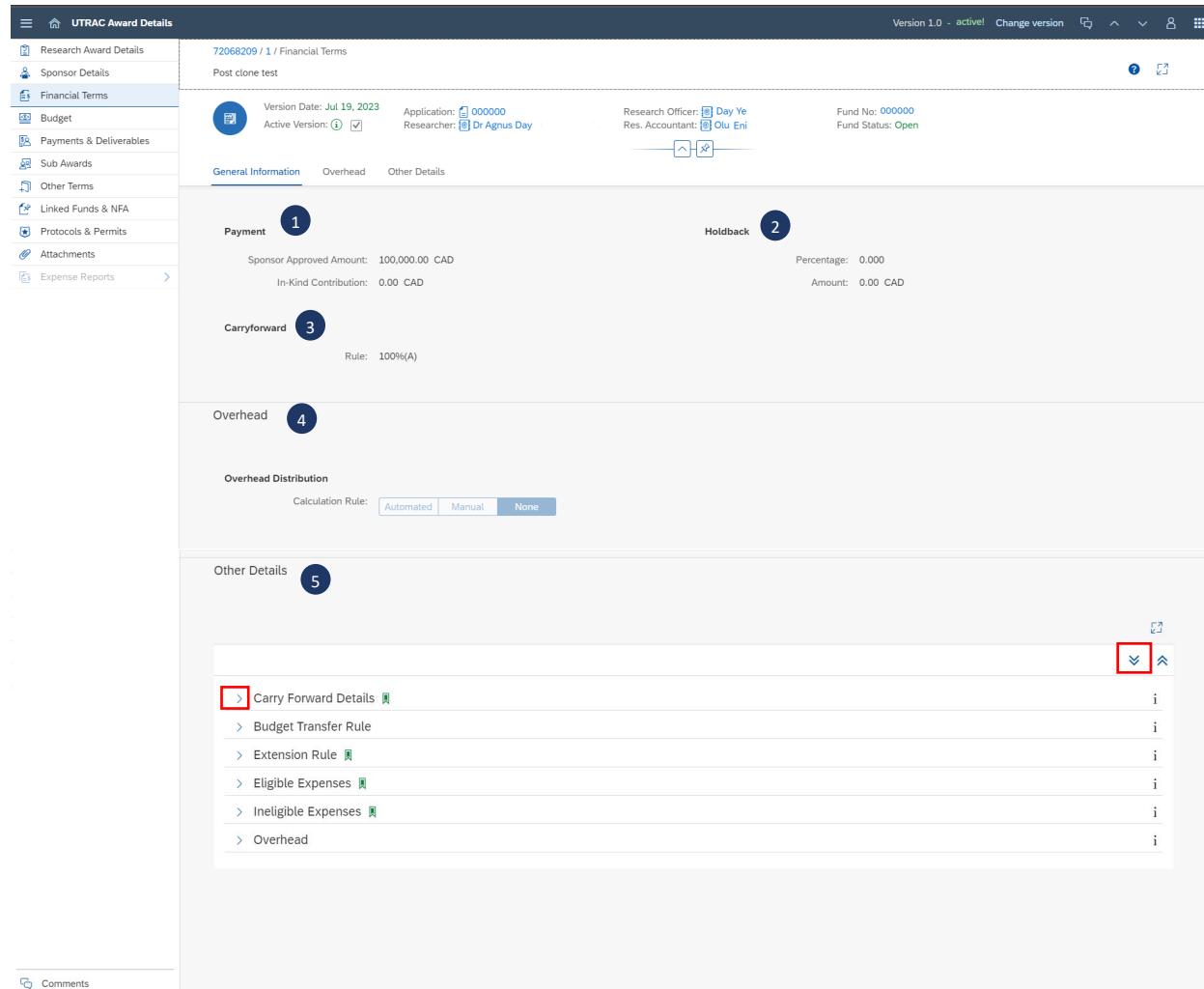
- **Sponsor:** The name of the agency, organization, or company that is funding the research.
- **Program:** The program under which the agency, organization, or company will fund the research.
- **Division:** The sponsor division under which the program resides.
- **Customer ID:** FIS code and description corresponding to the Sponsor ID.
- **Sponsor Reference:** Number assigned by the Sponsor for the application/award. This number is generally cited in the Sponsor's letter of award or funding agreement.

### 2 Other Details

- **Sponsor Additional Information:** Text field displaying additional sponsor information, such as contact details, if applicable.

## Financial Terms

This page contains financial terms and conditions governing the research award, as indicated in the funding agreement or letter of award. This includes the award amount approved by the Sponsor and any holdback (if applicable), carryforward rules, overhead (indirect costs) rules, and other financial terms.



The screenshot shows the UTRAC Award Details page for award 72068209. The left sidebar lists categories: Research Award Details, Sponsor Details, Financial Terms (selected), Budget, Payments & Deliverables, Sub Awards, Other Terms, Linked Funds & NFA, Protocols & Permits, Attachments, and Expense Reports. The main content area has tabs: General Information, Overhead, Other Details, and a summary table with columns for Payment (1), Holdback (2), Carryforward (3), and Overhead (4). The Payment section shows a Sponsor Approved Amount of 100,000.00 CAD and an In-Kind Contribution of 0.00 CAD. The Holdback section shows a Percentage of 0.000 and an Amount of 0.00 CAD. The Carryforward section shows a Rule of 100%(A). The Overhead section shows a distribution rule set to Automated. The Other Details section lists items like Carry Forward Details, Budget Transfer Rule, Extension Rule, Eligible Expenses, Ineligible Expenses, and Overhead. A red box highlights the 'Carry Forward Details' link. The top right of the page shows version 1.0 - active, Change version, and navigation icons.

### 1 Payment

- **Sponsor Approved Amount:** Total amount and currency expected from the Sponsor, as indicated on the Sponsor letter of award or agreement.
- **In-Kind Contribution:** Dollar value of in-kind matching that meets ALL of the following criteria:
  - Non-cash but has financial value;
  - Contribution from an external institution or industry partner;
  - Required by Sponsor to be included on the financial report.

## 2 Holdback

- **Percentage:** Percentage of the total award that will remain unpaid by the Sponsor until a condition or instance required by the Sponsor has occurred (e.g. completion of project milestone or final deliverable).
- **Amount:** Amount of the total award that will remain unpaid by the Sponsor until a condition or instance required by the Sponsor has occurred.

## 3 Carryforward

- Carryforward rule for unspent balance between budget periods set by the Sponsor. For example, will indicate if the Sponsor allows 100% carryforward of unspent balance between periods, no carryforward, or some other rule.

## 4 Overhead

- Indicates the rule as set by the Sponsor agreement/letter of award for calculating overhead (i.e. indirect costs) in relation to the direct costs budget.
- For example:
  - **Automated – Fixed Amount:** Shows the dollar amount for overhead calculation, including the total amount and calculated monthly amount.
  - **Automated – Percentage:** Shows the percentage rate (%) for overhead calculation as a function of direct costs, including which specific budget categories are counted as direct costs for overhead calculations and any exclusions, if applicable.
  - **Manual:** If the overhead rule is complex, there will be no calculation rule indicated here. Further information on how overhead is calculated will be included in the **Overhead** field under **Other Details** (see #5).
  - **None:** There is no overhead budget on this award.

## 5 Other Details

Fields containing text will have a green ribbon . Fields that are empty will not have a green ribbon. To view the contents of the field(s), click on the expand/collapse or the expand all button marked in red on the image above.

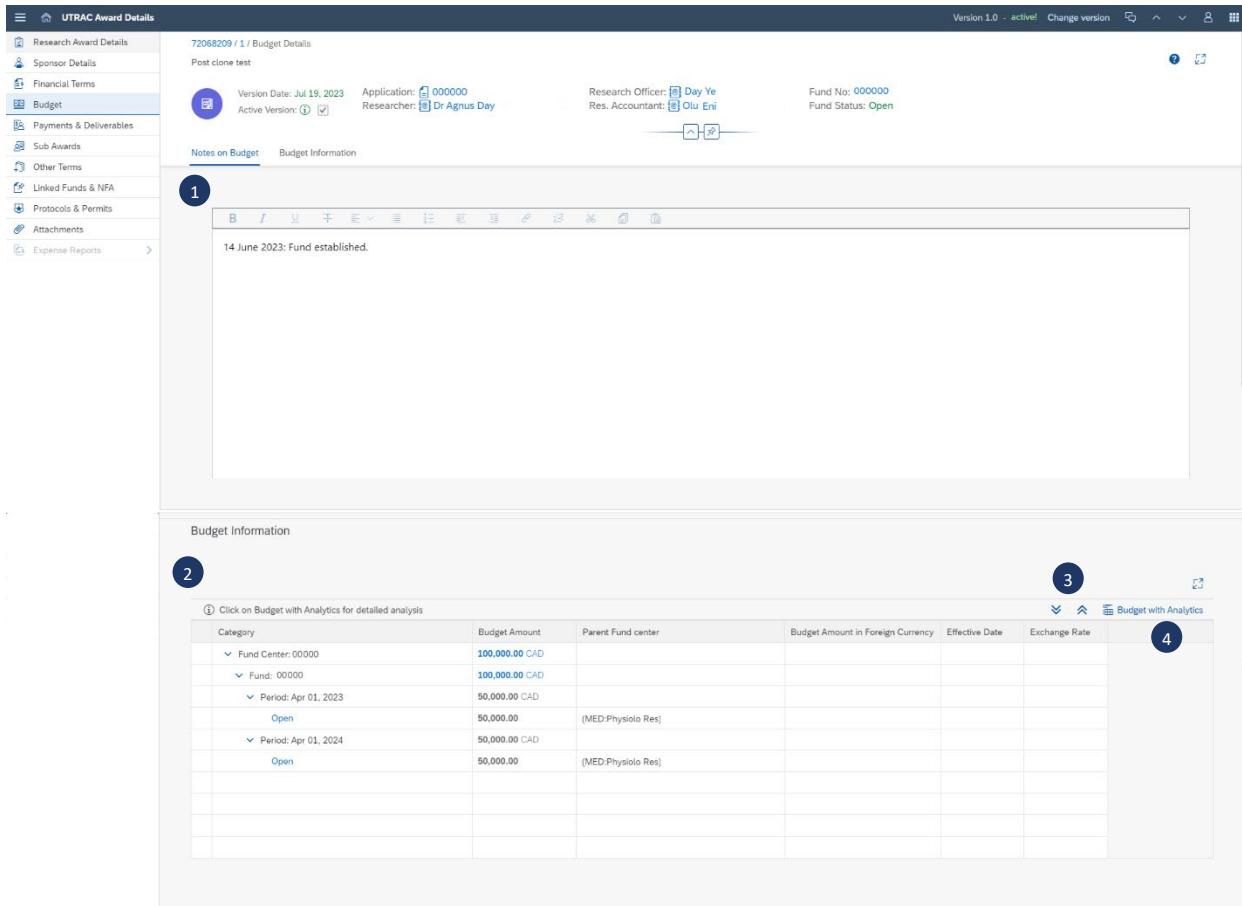
- **Carry Forward Details:** Additional information related to the carry forward rule for unspent balance between budget periods set by the Sponsor, if applicable.
- **Budget Transfer Rule:** Information related to any restrictions on transferring budget between budget categories and steps that need to be followed to make these changes, if applicable.
- **Extension Rule:** Information related to the procedure for requesting a project extension from the Sponsor and deadline for submission of the request, if applicable
- **Eligible Expenses:** Information related to eligible expense categories according to the agreement and/or Sponsor rules, if applicable.
- **Ineligible Expenses:** Information related to any expense types that are ineligible according to the agreement and/or Sponsor rules, if applicable.

- **Overhead:** Additional overhead details (in addition to the Overhead calculation rules, if any) set by the Sponsor, if applicable.

You can also view the “Other Details” section in full screen mode by clicking the  button.

## Budget

This page contains information about the budget that has been set up for this research award, including a breakdown of the budget by major budget category, and explanatory notes related to the award budget and any changes over the lifetime of the award. This page also allows you to download the budget into a Microsoft Excel file for analysis.



1

Notes on Budget      Budget Information

14 June 2023: Fund established.

2

3

4

Click on Budget with Analytics for detailed analysis

Category	Budget Amount	Parent Fund center	Budget Amount in Foreign Currency	Effective Date	Exchange Rate
▼ Fund Center: 00000	100,000.00 CAD				
▼ Fund: 00000	100,000.00 CAD				
▼ Period: Apr 01, 2023	50,000.00 CAD				
Open	50,000.00	(MED:Physiolo Res)			
▼ Period: Apr 01, 2024	50,000.00 CAD				
Open	50,000.00	(MED:Physiolo Res)			

1 **Notes on Budget:** Information related to the award budget, such as details on incrementally funded awards (e.g. budget releases for each period are subject to separate approval from the Sponsor), special foreign currency notes, and any adjustments to the budget over the lifetime of the award.

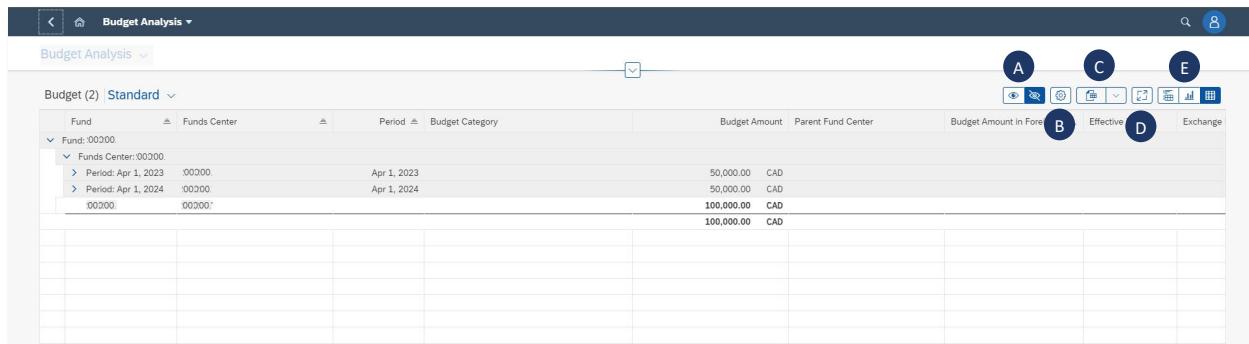
## 2 Budget Information

- Table that displays the spending limits approved by the Sponsor for the various categories of expenditures and at the various times when the amounts become available. When co-investigators have direct access to portions of the budget, this is broken down further by PI Funds Center. To expand periods and view the commitment items, click the  button.
- For budgets from international Sponsors set up in foreign currency, in addition to the Canadian dollar amount the table will list the budget amount in the original foreign currency, the effective date of the exchange rate used, and the exchange rate for conversion.

## 3 Expand all / Collapse all

- **Expand all button**  : Expand Funds Center (s) and Period(s) listed in budget table to show detailed budget categories.
- **Collapse all button**  : Collapse Funds Center(s) and Period(s) listed in budget table to hide detailed budget categories.

## 4 Budget with Analytics



The screenshot shows the 'Budget Analysis' interface. At the top, there are navigation icons and a search bar. Below the header, the title 'Budget Analysis' is followed by a dropdown menu and a search bar. The main area is a table titled 'Budget (2) | Standard'. The columns are: Fund, Funds Center, Period, Budget Category, Budget Amount, Parent Fund Center, Budget Amount in Fore, Effective, and Exchange. The table data is as follows:

Fund	Funds Center	Period	Budget Category	Budget Amount	Parent Fund Center	Budget Amount in Fore	Effective	Exchange
00200	Funds Center: 00200	Period: Apr 1, 2023	00200	Apr 1, 2023		50,000.00	CAD	
		Period: Apr 1, 2024	00200	Apr 1, 2024		50,000.00	CAD	
			00200	00200		100,000.00	CAD	
						100,000.00	CAD	

At the bottom of the table, there are several blue circular icons labeled A, B, C, D, and E, each with a different symbol: A has a magnifying glass, B has a document, C has a chart, D has a gear, and E has a grid. Below the table, there is a large empty area with a grid pattern.

- **Show Items:** Either shows all budget data in table view, or only shows data based on selection on the chart visualization.
- **Settings:** Add additional columns or remove listed columns. Users can also shuffle the order of the columns using .
- **Export:** Export budget data as an Excel file.
- **Full Screen:** Minimize/maximize section.
- **View Graphs:** Users can pick from different visualization options to view the budget data in graphical form.

## Payments & Deliverables

This page shows the method in which U of T will be paid by the Sponsor, the dates on which payments will be received, and any deliverables that are due to the Sponsor by U of T, including deliverable types and schedule for submission.

The screenshot shows the UTRAC Award Details page for Research Award Details, specifically the Payments & Deliverables section. The page is titled '72068209 / 1 / Payments & Deliverables' and includes a sidebar with various tabs: Research Award Details, Sponsor Details, Financial Terms, Budget, Payments & Deliverables (selected), Sub Awards, Other Terms, Linked Funds & NFA, Protocols & Permits, Attachments, and Expense Reports.

**General Information:** Version Date: Jul 19, 2023, Application: 000000, Researcher: Dr Agnus Day, Research Officer: Day Ye, Res. Accountant: Oiu Eni, Fund No: 000000, Fund Status: Open.

**Payment Details:** Approved (1) and Expected (2) sections. Approved: Sponsor Approved Amount: 100,000.00(CAD), Holdback Percentage: 0.00, Holdback Amount: 0.00(CAD), Difference: 100,000.00(CAD). Expected: Total Expected Amount: 100,000.00(CAD), Expected holdback: 0.00(CAD), Difference: 100,000.00(CAD).

**Payment Method:** Payment methods / Activity types (3). Activity Type: Fixed Instalments, Frequency: Annual, Expected Amount: 100,000.00.

**Deliverables:** Deliverables (5) table. Contains three rows: Financial Reporting (Frequency: No, Payment Driver: No, Required: No), Audit (Frequency: No, Payment Driver: No, Required: No), and Progress Report (Frequency: Irregular, Payment Driver: No, Required: Yes).

**Other Details:** Other Details (6) section. Methods of Payment-Other (highlighted with a red box): Central Financial Report, Divisional Financial Report, External Audit, Progress Report.

## 1 Payment Details (Approved)

- **Sponsor Approved Amount:** Total award amount expected from the Sponsor, as indicated on the Sponsor agreement or letter of award (in payment currency).
- **Holdback Percentage:** The percentage of the Sponsor Approved Amount that will remain unpaid by the Sponsor until a condition(s) or deliverable(s) required by the Sponsor has been met, if applicable.
- **Holdback Amount:** Holdback amount (in payment currency) equivalent to the Holdback Percentage.
- **Difference:** Difference between Sponsor Approved Amount and Holdback Amount (in payment currency)

## 2 Payment Details (Expected)

- **Total Expected Amount:** Total sum of the expected amount in the payment schedule.
- **Expected Holdback:** Total sum of expected holdback amount in the payment schedule.
- **Difference:** Difference between Total Expected Amount and Expected Holdback (in original currency)

## 3 Payment Method

- **Activity Type:** Defines how payment will be made to U of T by the Sponsor.
  - i. **Fixed Instalments:** Sponsor has pre-defined payment schedule and instalment amounts.
  - ii. **Fixed Instalments with Deliverable(s):** Sponsor has pre-defined payment schedule and instalment amounts and requires submission of document(s) and/or completion of task(s).
  - iii. **Invoiced-Fixed:** Sponsor has pre-defined payment schedule and instalment amounts, and payment will be prompted by the submission of an invoice by VPRI Research Financial Reporting and Audit office.
  - iv. **Invoiced-Fixed, with Deliverable(s):** Sponsor has pre-defined payment schedule and instalment amounts, and payment will be prompted by the submission of an invoice by VPRI Research Financial Reporting and Audit office and requires submission of document(s) and/or completion of task(s).
  - v. **Invoiced- Cost Recovery:** Sponsor's payment will be prompted by the submission of an invoice by VPRI Research Financial Reporting and Audit office on a defined schedule, and the invoice amount will be based on actual expenses incurred during a defined period.
  - vi. **Invoiced- Cost Recovery with Deliverable(s):** Sponsor's payment will be prompted by the submission of an invoice by VPRI Research Financial Reporting and Audit office on a defined schedule, and the invoice amount will be based on actual expenses incurred during a defined period and requires submission of document(s) and/or completion of task(s).
  - vii. **Deliverables Only:** Sponsor's payment will be prompted only by submission of document(s) and/or completion a task(s).
- **Frequency:**
  - i. **Monthly:** Payments are expected every month
  - ii. **Quarterly:** Payments are expected four times a year, every 3 months.
  - iii. **Bi-Annual:** Payments are expected twice a year, every 6 months.

- iv. **Annual:** Payments are expected once a year, every 12 months.
- v. **Irregular:** Payment due dates do not have a regular interval as per the four selections above.
- vi. **Off-cycle:** There are payment due dates in between the regular payment schedule.

#### 4 Payment Method Schedule

To view the full schedule, click on the expand button  to the left of the payment Activity Type.

Payment methods / Activity types							
 Activity Type Invoiced - fixed	Frequency Annual	Expected Amount 100,000.00	Scope Start Date Apr 1, 2024	Scope End Date Mar 31, 2024	Deduct Holdback per Invoice No		

#### Payment Method Schedule – expanded view:

**Note:** The example provided below is for the payment Activity Type **Invoice Fixed**. The columns and fields displayed in the Payment Method Schedule will vary depending on the payment Activity Type; for example, Fixed Instalments will have an Expected Amount and Due Date, but no Scope Start and Scope End.

Payment Method Schedule					
Payment Type	Expected Amount	Due Date	Scope Start	Scope End	Notification
Interim	50,000.00	Apr 1, 2024	Apr 1, 2023	Mar 31, 2024	 
Final	50,000.00	Apr 1, 2025	Apr 1, 2024	Mar 31, 2025	  

- **Payment Type:** Classification of payment activity and includes the following types:
  - i. **Interim:** Interval payments to be made by the Sponsor.
  - ii. **Final:** The last payment to be made by the Sponsor.
  - iii. **Final/Holdback:** The last payment to be made by the Sponsor and represents the amount held back.
  - iv. **Off Cycle:** Payment to be made by the Sponsor between a regular interval.
- **Expected Amount:** Amount to appear on invoice (in currency as on agreement), if applicable.
- **Due Date:** Date on which the invoice is due to the Sponsor (submitted by the VPRI Research Financial Reporting and Audit office) or on which the fixed payment is due to U of T.
- **Scope Start:** First day in date range for incurring expenses covered by the invoice, if applicable.

- **Scope End:** Last day in date range for incurring expenses covered by the invoice, if applicable.
- **Notification:**
  - Notifications are ON: Assigned users will be sent a notification via email for the selected payment(s).  
To find which users were assigned to be notified, look under the “Assign Notification Roles”. To find when the assigned users will be notified, look under “Notifications before Due Date”.

Payment Details

Allocated Details  
Total Payment | CAD  
**100 K** Payment Other Types Fund Start Fund End  
100K Apr 1, 2023 Mar 31, 2025  
Hold 0

Sponsor Approved Amount	100,000.00
Hold Amount	0.00
Difference	100000.00
Total Allocated Amount	100000.00
Total Allocated Hold Amount	0.00
Total Allocated Other Types	100000.00

Current Activity Payment Schedule  
Total Payment | CAD  
**100 K** Payment Other Types  
100K  
Hold 0

Current Activity Allocated Amount	100,000.00
Current Activity Hold Amount	0.00
Current Activity Difference	100,000.00
Total Expected Other Activity	0.00
Total Hold Other Activity	0.00
Total Difference from Other Activity	0.00

Grant Dates : **MAR 31, 2023 MAR 30, 2025** Balance to Allocate : **OTHER 0.00 HOLD 0.00**

**Notification Roles for current activity**  
Assign Notification Roles: Principal Investigator (PI)

**Notification before Due Date**  
Number of Days: **030**

In this example, the Researcher/PI will be notified via email 30 days before the payment is due.

- Notifications are OFF: No user(s) will be sent any notification for the selected payment(s).

## 5 Deliverables

- **Deliverable:**
  - Financial Reporting:** Research financial report prepared by the VPRI Research Financial Reporting and Audit office and submitted to the Sponsor.
  - Audit:** Audit to be conducted by the Sponsor’s auditors and coordinated by the VPRI Research Financial Reporting and Audit office.
  - Progress Report:** ccc
- **Frequency:**
  - Monthly:** Deliverables are expected every month
  - Quarterly:** Deliverables are expected four times a year, every 3 months.
  - Bi-Annual:** Deliverables are expected twice a year, every 6 months.
  - Annual:** Deliverables are expected once a year, every 12 months.

- v. **Irregular:** Deliverables due dates do not have a regular interval as per the four selections above.
- vi. **Off-cycle:** There are deliverables due dates in between the regular deliverables schedule.
- **Payment Driver:**
  - i. **Yes:** Payment will be released only when the deliverable is submitted to the Sponsor.
  - ii. **No:** Payment does not depend on the submission of this deliverable to the Sponsor.
- **Required:**
  - i. **Yes:** Deliverable is required by the Sponsor. To view the deliverable schedule, click on the expand button > (see Deliverables Schedule section below).
  - ii. **No:** Deliverable is NOT required by the Sponsor.
- **Deliverables Schedule**

If a deliverable is required, it will have a deliverables schedule. To view the full schedule, click on the expand button > to the left of the required deliverable.

Expand button to display the detailed Deliverables schedule.
 

Deliverable	Frequency	Payment Driver	Required
Progress Report	Annual	No	Yes

◇
↗

Notification Roles for current activity
B
Notification Frequency before Due Date

Assign Notification Roles: Principal Investigator (PI)
 Frequency Days:

More Details

(i) Deliverables Schedule
A

Report Type	Requested Amount	Due Date	Scope Start	Scope End	Notification
Interim	<input type="text" value="0.00"/>	Mar 31, 2024	Apr 1, 2023	Mar 31, 2024	<span style="border: 1px solid red; border-radius: 50%; padding: 2px 5px;">X</span>
Final	<input type="text" value="0.00"/>	Mar 31, 2025	Apr 1, 2024	Mar 31, 2025	<span style="border: 1px solid green; border-radius: 50%; padding: 2px 5px;">✓</span>

### A Deliverable Schedule

- **Report Type**
  - a) **Interim:** Regular deliverables due to the Sponsor over the lifetime of the award.
  - b) **Final:** The last deliverable to be submitted to the Sponsor.
  - c) **Final/Holdback:** The last deliverable to be submitted to the Sponsor and represents the amount held back.
  - d) **Off Cycle:** Deliverable to be submitted to the sponsor between a regular interval.

- **Due Date:** Date on which the deliverable must be submitted to Sponsor.
- **Scope Start:** Deliverable will cover a scope period starting with the scope start date.
- **Scope End:** Deliverable will cover a scope period ending with the scope end date.
- **Notification:**
  - a)  Notifications are ON: Assigned users will be sent a notification via email for the selected deliverable(s).
  - Note:** To find which users were assigned to be notified and how many days before the Due Date, see **B**.
  - b)  Notifications are OFF: No user(s) will be sent any notification for the selected deliverable(s).

#### **B** Notifications

- **Assign Notifications Role:** Role to be notified; e.g. PI.
- **Frequency Days:** Number of days before deliverable Due Date in which the role listed under “Assign Notifications Role” will be notified.

#### **6** Other Details

Fields containing text will have a green ribbon  . Text fields that are empty will not have a green ribbon. To view the contents of the field(s), click on the expand/collapse or the expand all button marked in red on the image above.

- **Method of Payment-Other:** Supplementary details relating to the Payment Method, if applicable.
- **Central Financial Report:** Supplementary details relating to Financial Reporting deliverable(s) to be prepared by the VPRI Research Financial Reporting & Audit office, if applicable.
- **Divisional Financial Report:** Supplementary details relating to Financial Reporting deliverable(s) to be prepared by the Academic Division/Unit, if applicable.
- **External Audit:** Supplementary details relating to the Audit deliverable, if applicable.
- **Progress Report:** Supplementary details relating to the Progress Report deliverable to be prepared by the Researcher and submitted to the Sponsor, if applicable.

You can also view the “Other Details” section in full screen by clicking the  icon.

## Sub Awards

This page provides information related to outgoing sub-awards; i.e. funding from a U of T-administered research award flowing out to another institution/organization under an inter-institutional agreement. It will allow you to view information about each Sub-awardee Institution, including sub-award amount, period, Co-Investigator, etc. It will also allow you to access sub-award related documents, such as inter-institutional agreements and associated amendments.

The screenshot shows the UTRAC Award Details page for a specific award. The left sidebar lists various award details, and the main content area shows the 'Sub Awards' section. The 'General Information' tab is selected, displaying the sub-award number (72068939), version date (Nov 20, 2023), application number (231629), researcher (Prof Vince), and officer (Safa). The 'Fund Status' is shown as 'Open'. The 'Sub-Awards Details' tab is also visible. The 'Amount Details' section shows the sponsor approved amount (300,000.00 CAD), holdback percentage (10.00), holdback amount (30,000.00 CAD), and difference (270,000 CAD). The 'Approved' section shows the researcher (Professor Test) and a note about autopay. The 'Award Details' sub-page is annotated with numbered circles:

- 1: Sub-Awardee No. (10, Holland Bloorview Hospital (EFT) / 108995)
- 2: Sub-Awardee Researcher (Professor Test)
- 3: Payments & Deliverables / Documents buttons (Display Schedule, Display Address, View Attached IIA Docs)
- 4: Hold Item:
- 5: Sub-Award Type: Original
- 6: IIA Details: Amount: 20,000.00, Currency: CAD, Holdback %: 0.00
- 7: Commitment Item: Subgrant1(SUBGRANT1), Period From: Apr 1, 2025, Period To: Mar 31, 2027
- 8: A small number 8 is located near the bottom right of the sub-page.
- 9: A note about autopay: "Use autopay to generate payments for this sub-award. Autopay will automatically generate payment tasks for your Director's approval based on the payment schedule you enter into Payment & Deliverables. Autopay will only function for sub-awards that use CAD currency and that use a payment method of fixed installment (with or without deliverables)."

- 1 **Sub-Awardee Institution:** The organization or institution that will be receiving the funding from U of T.
- 2 **Sub-awardee Researcher:** Name of the Co-Investigator (Co-I) at the Sub-Awardee Institution.

### 3 **Payments & Deliverables / Documents:**

- **Display Schedule:** Payments & Deliverables schedule. For more information on how to read the schedule, see the [Payments & Deliverables section](#) (**Note:** For outgoing sub-awards, Payment Method indicates how U of T will be paying the Sub-Awardee Institution. Deliverables indicates which deliverables the Sub-Awardee Institution must send to U of T).
- **Display Address:** Sub-awardee contact information.
- **View Attached IIA Docs:** View/download the inter-institutional agreement/sub-award agreement.

**4 Hold Item**

- If box is unchecked: No holds exists, and sub-award payments will be released to Sub-Awardee Institution according to the schedule.
- If box is checked: A hold is placed on further sub-award payments due to one or more reasons, e.g., by request from the Researcher.

**5 Sub-Award Type:**

- **Original:** Initial inter-institutional agreement.
- **Amendment:** Amending inter-institutional agreement and associated number.

**6 IIA Details**

- **Amount:** Total amount of funding that will be transferred to the Sub-Awardee Organization under the inter-institutional agreement.
- **Currency:** Currency for Sub-award amount.
- **Holdback %:** Holdback percentage for Sub-award amount.

**7 Commitment Item:** The budget category grouping (e.g., subgrant1, subgrant2, etc.) in FIS under which the Sub-award budget is set up.

**8 Period From and To:** These dates correspond to the Sub-award term (start and end date).

**9 Autopay Toggle**

- **Yes:** The Research Officer has turned on autopay (automatic payments) for this sub-awardee.
- **No:** The Research Officer has turned off autopay (automatic payments) for this sub-awardee. All payments to this sub-awardee will be issued manually by VPRI or the administering unit, depending on the payment method.

**Note:** If a research award has multiple outgoing sub-awards (e.g. to McMaster University and Dalhousie University), each Sub-Award Institution and its associated details will be listed as a separate entry.

## Other Terms

This page contains non-financial related terms and conditions governing the award, as indicated in the funding agreement or letter of award. This includes terms related to intellectual property rights, equipment ownership, publications, etc.

The screenshot shows the UTRAC Award Details interface with the following sections:

- 1 Other Terms:** This section displays basic award information: Version Date (Jul 19, 2023), Application (000000), Researcher (Dr Agnus Day), Research Officer (Day Ye), Res. Accountant (Olu Eni), Fund No (000000), and Fund Status (Open). It also includes a note about intellectual property ownership and links to Inventions Policy and Copyright Policy.
- 2 Equipment Ownership:** This section displays a note about equipment ownership and links to the Guide to Financial Management – Capital Assets.
- 3 Publications:** This section displays a note about publication rights and links to the Publication Policy.

4 Copyright

Ownership of all copyright works generated in the performance of this research project is in accordance with University of Toronto policies. [For more details, refer to - Copyright Policy](#)

5 Inventions

Ownership of all inventions generated in the performance of this research project is in accordance with University of Toronto policies. [For more details, refer to - Inventions Policy](#)

6 Other

Comments

- 1 **Intellectual Property:** Specifies ownership and any rights that the Sponsor and/or U of T may have to intellectual property generated as a result of the research award.
- 2 **Equipment Ownership:** Outlines which party (Sponsor and/or U of T) owns the equipment purchased using award funds and any residual rights or rules on disposal.
- 3 **Publications:** Specifies arrangements regarding publications that must be followed, such as acknowledgement of sponsor's support, provision of copies to the sponsor for informational purposes, advance copies for review, etc.
- 4 **Copyright:** Specifies ownership, any waivers of moral rights in favor of the Sponsor, or any other Sponsor and/or U of T rights.

- 5 **Inventions:** Specifies ownership and any rights the Sponsor and/or U of T may have to any invention as well as any special invention reporting requirements.
- 6 **Other:** Outlines any other relevant terms & conditions defined by the Sponsor or U of T.

## Linked Funds & NFA

This page shows any related UTRACs (funded agreements) or non-funded agreements (e.g. Data Transfer Agreements, Material Transfer Agreements, etc.) that have been linked to this UTRAC.

The screenshot shows the 'UTRAC Award Details' page for UTRAC ID 72068939. The left sidebar includes links for Research Award Details, Sponsor Details, Financial Terms, Budget, Payments & Deliverables, Sub Awards, Other Terms, Linked Funds & NFA (selected), Protocols & Permits, Attachments, and Expense Reports. The main content area displays the following sections:

- Linked Funds( Different MRA )** (1): Shows a table for a linked UTRAC with ID 72000030, Fund 407068, and Researcher Prof Paul. The table includes columns for UTRAC ID, Fund, Is Master ?, Sponsor Ref., and Sponsor.
- Linked Funds( Same MRA )** (2): Shows a table with no linked funds displayed.
- Non-Funded Research Agreement** (3): Shows a table for a non-funded research agreement with ID 50000004, Type Material Transfer Agreement (MTA), Status Executed, and Effective Date Aug 6, 2019. The table includes columns for Agreement No., Type, Status, and Effective Date.

### 1 Linked UTRAC's details- Linked Funds (Different MRA)

*Funds/UTRACs that have been created based on a different RIS application number will be linked and listed by the Research Officer.*

- **UTRAC ID:** Identifier of UTRAC linked by the Research Officer.
- **Sponsor:** The name of the agency, organization, or company that is funding the research.
- **Program:** The program under which the agency, organization, or company will fund the research.
- **Researcher:** Name of the primary researcher on the research project

- **Application:** The title of the research project and the Application Number assigned when the MRA is created by the Researcher.
- **Fund:** Unique fund identifier assigned in FIS.
- **Is Master?:**
  - **Yes:** UTRAC where the Sponsor is providing funding for multiple projects under this master agreement.
  - **No:** UTRAC that is not a master agreement.
- **Sponsor Reference:** Number assigned by the Sponsor for application/award.

**2 Linked Funds (Same MRA)**

*Funds/UTRACs that have been created based on the same RIS application number will be automatically linked and listed.*

- **UTRAC ID:** Identifier of UTRAC automatically linked.
- **Fund:** Unique fund identifier assigned in FIS.
- **Sponsor:** The name of the agency, organization, or company that is funding the research.

**3 Non-Funded Research Agreement:**

- **Agreement No:** Non-funded research agreement number.
- **Expiry Date:** Date on which the non-funded research agreement expires.
- **Title:** Non-funded research agreement title.
- **Type:** Non-funded research agreement type (e.g., Material Transfer Agreement, Data Transfer Agreement).
- **Status:** Review or execution status of the non-funded agreement.
- **Effective Date:** Date on which the non-funded agreement took effect.

## Protocols & Permits

If the application (MRA) for this UTRAC has one or more animal use protocol(s), human research ethics protocol(s), or environmental health & safety permit(s) linked to it, information about those protocols/permits will appear on this page. Users can track the status and expiry date of the protocol(s) and/or permit(s). The page will also indicate if a protocol or permit has been applied for but has not yet been approved.

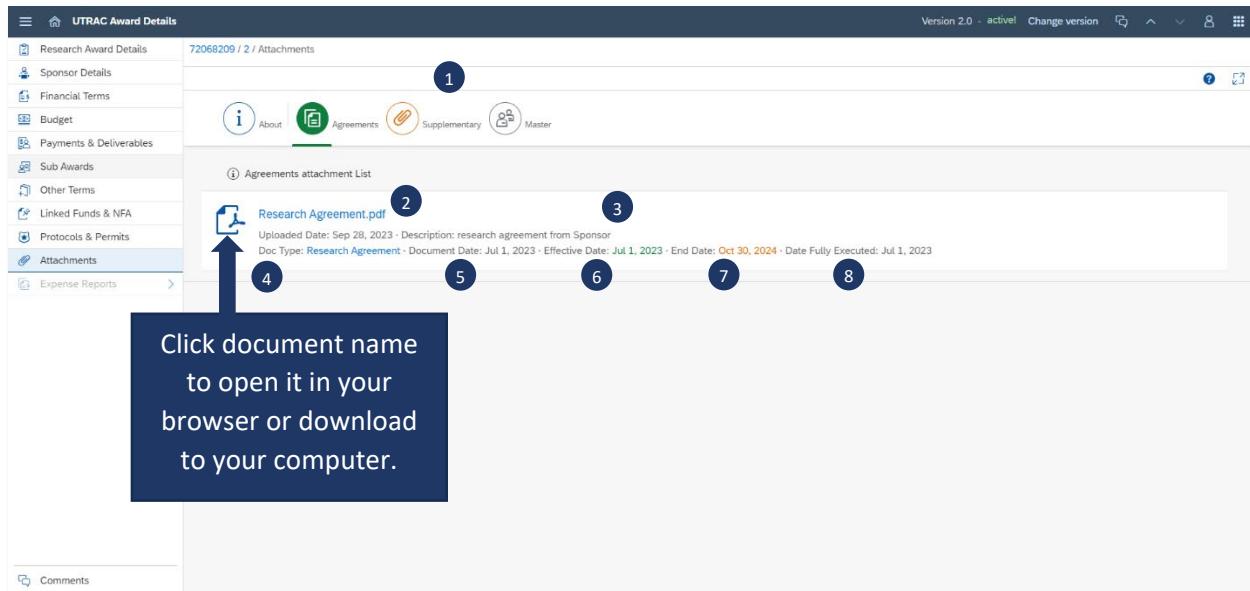
1. **Type:** Category of protocol or permit (Animal, Human, or Health & Safety).
2. **Protocol:** RIS ID number assigned to the protocol or permit.
3. **Title:** The title of protocol or permit.
4. **Expiry:** Date on which the protocol will expire / has expired.
5. **Status:** The current status of the protocol or permit
6. **PI:** Name of the Principal Investigator on the protocol or permit.

To apply for or renew a protocol or permit, please contact the appropriate compliance unit (e.g. Animal Ethics & Compliance Unit, Environmental Health & Safety Office, etc.) using the VPRI [Contact Us](#) directory.

**Note:** You are not able to access the original protocol records directly from UTRAC. To view a human or animal protocols shown on this page, you must access to My Research Human Protocols (MRHP) or My Research Animal Protocols (MRAP), respectively, from the [My Research portal](#).

## Attachments

This page contains funding documents and supplementary materials that have been attached to this UTRAC. Attached documents can include research funding agreements, letters of award, amendments, master agreements, and other supporting documents. Attached documents are grouped by category.



**1 Document categories:**

- **Agreements:** Documents that can include research agreements, notice of awards, and amendments.
- **Supplementary:** Documents that can include progress reporting templates, Sponsor policies, etc.
- **Master:** Master agreement-related documents.

**2 Document name:** Title of the document filename and extension.

**3 Uploaded Date:** Date on which document was uploaded and description entered by Research Officer.

**4 Document Type:** Subcategory of document; e.g. research agreement, notice of award, amendment, etc.

**5 Document date:** Date of the document entered by the Research Officer.

**6 Effective Date:** Date on which the agreement or amendment takes effect.

**7 End Date:** Date on which the agreement or amendment ends.

**8 Date Fully Executed:** Date on which the agreement or amendment was fully executed, if applicable.

To access a document, click on the document name (blue hyperlink). Depending on the type of document and your browser settings, clicking a document will either open it directly in your browser or download it to your computer, where you can open it using the software installed on your computer.

## Comments

The Comments page can be used to leave comments related to the UTRAC for other viewers to read.

**\*\*Important Note: Comments made on this page will be visible to ALL users who can access the UTRAC.**

The screenshot shows the UTRAC Award Details page. The sidebar on the left includes links for Research Award Details, Sponsor Details, Financial Terms, Budget, Payments & Deliverables, Sub Awards, Other Terms, Linked Funds & NFA, Protocols & Permits, and Attachments. The main content area shows a comment from 'Mr Michael H' (1) and another from 'Prof Vince' (2). The comment from Mr Michael H says: 'Please see the document attachment section for a copy of the research agreement'. The comment from Prof Vince is empty. A search bar is located at the top right of the main content area.

- 1 Comment left by a user (e.g., Research Officer, Researcher, etc.), including the username and date stamp.
- 2 Search field can be used to filter through comments.

## Appendix A: Access to My Research Funds by Role

Role	How Access is Assigned	Comments
Principal Investigator (PI)	<p>For U of T paid employees, all tenured, tenure stream, non-tenure stream, teaching faculty with the rank of Professor, Associate Professor and Assistant Professor and Librarians have automatic access to the system.</p> <p>Hospital-paid clinicians and status-only researchers with a Professoriate rank will be given access upon request. Professors Emeriti will be provided access with the approval of their Unit Head.</p>	<p>See <a href="#">PI Eligibility Guidelines</a> for instructions on how to request exceptional case PI eligibility.</p>

Role	How Access is Assigned	Comments
Business Officer (BO) (For administrative staff who have access to FIS)	MRF access for business officers is included in the <b>RIS Business Officer Role in MRA</b> .	This role provides visibility to everything the PI sees on MRF, including access to attached documents.
Project Manager (PM) (For a researcher's U of T paid support staff who don't have access to FIS)	Submit the <a href="#">Access form</a> to request access.	This role provides visibility to everything the PI sees on MRF.
Unit Head (Chair/Director/Principal/Dean)	Assigned automatically based on appointments in U of T's human resources information system (HRIS).	It's important that these appointments are kept up to date by divisional officers in HRIS.
Unit Head (Chair/Director/Principal/Dean) Alternate Approver	Designated by Chair/Director/Principal/Dean within My Research Applications (MRA), or by the RAISE team upon request by the Unit Head via email at <a href="mailto:raise@utoronto.ca">raise@utoronto.ca</a> .	Must be a U of T faculty member.
Divisional Research Services Officer (DRSO)	Designated by Principal/Dean within My Research Applications (MRA), or by the RAISE team upon request by the Unit Head via email at <a href="mailto:raise@utoronto.ca">raise@utoronto.ca</a> .	Must be U of T administrative staff.

## Appendix B: No Posting

In cases where there is a compliance issue (e.g. expired Human Research Ethics protocol, Animal Use protocol, or Environmental Health & Safety permit), a No Posting status may be applied to the fund in combination with one or more funds center for the UTRAC. A No Posting status prevents expenditures from being charged to the fund until the compliance issue has been resolved.

If a No Posting status has been placed on your fund, please follow the instructions provided in the notification you will receive.

To view No Posting details, click the “View No Post” button on the Research Award Details screen in UTRAC.

Funds Center Details			
Funds Center	Parent Funds Center	Lead PI	No Post
(200127)	MED:Physiolo Res(105984)	<input checked="" type="checkbox"/> Yes	 Yes
Cost Center: MED:Physiology:Research(10326)			
Internal Order: -			

**Click View No Post**



View No-Post for Fund

Fund Center List 1

Funds Center	Parent Funds Center	Lead PI	No Post	Cost Center
(200127)	MED:Physiolo Res(105984)	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> Yes	MED:Physiology:Research(10326)

No Post Conditions 2

Created By	Created On	Changed By	Changed On	Resolved?
Mark	Nov 13, 2023	Mark	Nov 13, 2023	No <input type="checkbox"/>

Protocol/Permit:

Human Protocol

20001790

Fund Center:

200127

Reason\*:

Protocol expired ages ago

History 3

Created By	Created On	Protocol / P...	Fund Center	Status	Issue Message	Resolved By	Resolved On	Resolved M...	Applied On /...
Mark	Nov 13, 2023	20001790 Human Protocol	200127 (Lead)	<input type="checkbox"/> ... Nov 13, 2023 / Mark	<a href="#">Show Message</a>				Nov 13, 2023 / Mark
Mark	Nov 13, 2023	20001151 Human Protocol	200127 (Lead)	<input checked="" type="checkbox"/> ... Nov 13, 2023 / Mark	<a href="#">Show Message</a>	Mark	Nov 13, 2023	<a href="#">Show Message</a>	Nov 13, 2023 / Mark

## 1 Funds Center List

- **Funds Center:** Funds center number. Will list the Lead PI Funds Center and any additional Funds Centers for Co-Investigators if budget has been split on the award.
- **Parent Funds Center:** Departmental funds center number under which the Funds Center resides.
- **Lead PI:**
  - **Yes:** This is the lead Researcher on this research project

- **No:** This is a Co-Investigator on this research project
- **No Post:**
  - **Yes:** This funds center currently has a No Posting status applied in combination with the fund.
  - **No:** This funds center does not have a No Posting status applied.
- **Cost Center:** Departmental cost center number

## 2 No Post Conditions

- **Created By:** Name of the VPRI contact who placed the condition driving the No Posting status.
- **Created On:** Date on which the condition was applied.
- **Changed By:** Name of the VPRI contact who last edited the condition.
- **Changed On:** Date on which the VPRI contact last edited the condition.
- **Resolved:** Date on which the condition driving the No Posting status was resolved for the specified reason.
- **Protocol/Permit:** Type of protocol/permit to which the condition was related (Human protocol, Animal protocol, Ethics permit, or Other) and the protocol/permit number, if applicable.
- **Funds Center:** Funds center number on which the No Posting status was applied.
- **Reason:** Reason entered by the VPRI contact for why the condition was applied or resolved.

## 3 History

- **Created By:** Name of the VPRI contact who placed the condition driving the No Posting status.
- **Created On:** Date on which the condition was applied.
- **Protocol/Permit:** Type of protocol/permit to which the condition was related (Human protocol, Animal protocol, Ethics permit, or Other) and the protocol/permit number, if applicable.
- **Funds Center:** Funds center number on which the No Posting status was applied.
- **Status:**
  -  **No Post Applied** No Posting status is currently placed on the specified funds center/fund combination, as of the listed date.
  -  **No Post Lifted** No Post was lifted on the specified funds center/fund combination, as of the listed date.
- **Issue Message:** The reason entered by the VPRI contact when specifying the condition driving the No Posting status.
- **Resolved By:** The name of the VPRI contact who resolved the condition.
- **Resolved:** Date on which the condition driving the No Posting status was resolved.
- **Resolved Message:** The reason entered by the VPRI contact when resolving the condition driving the No Posting status.
- **Applied On/By:** Date on which the No Posting status was applied and by whom.