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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 (FRd). 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

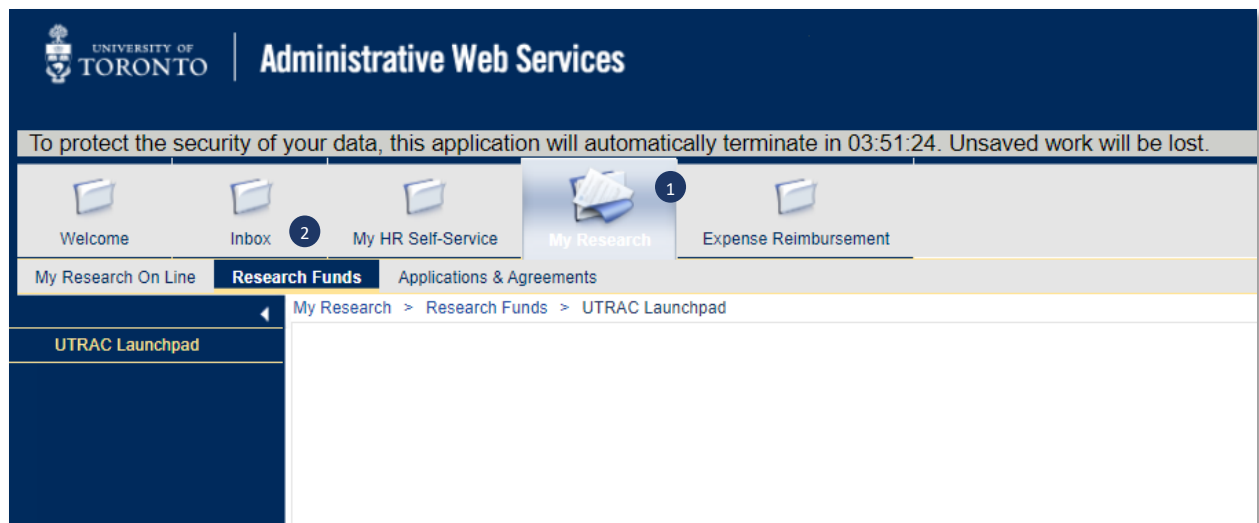
**Important Note:** Depending on your role, you may or may not have been assigned access to different My Research systems. For further details on how to obtain access, see [Appendix A](#).

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.

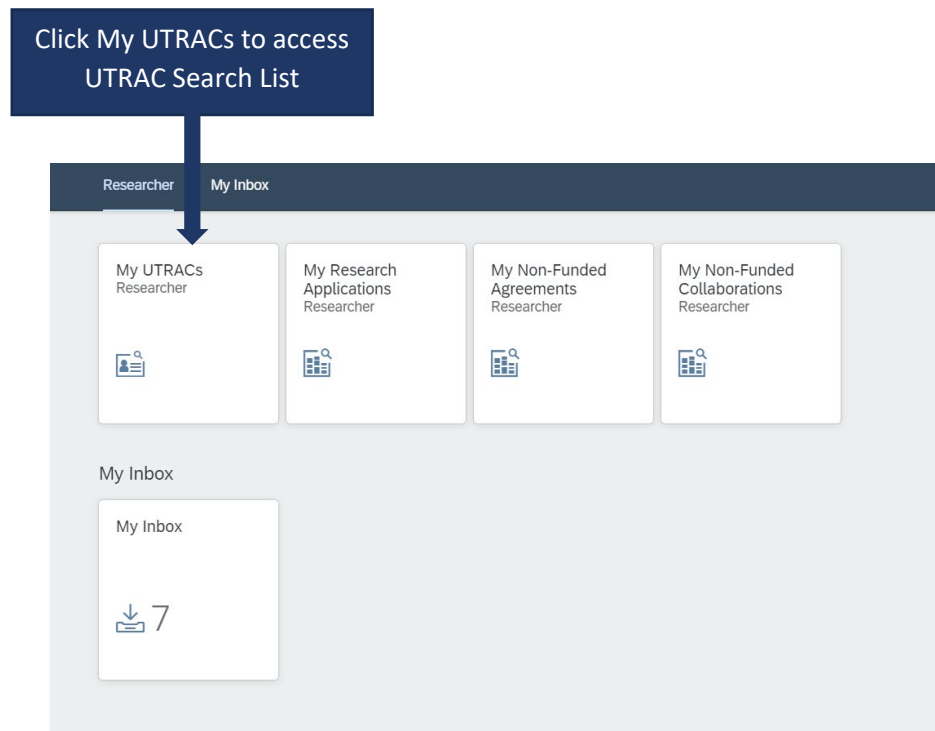
Standard UORMFA rules apply.

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



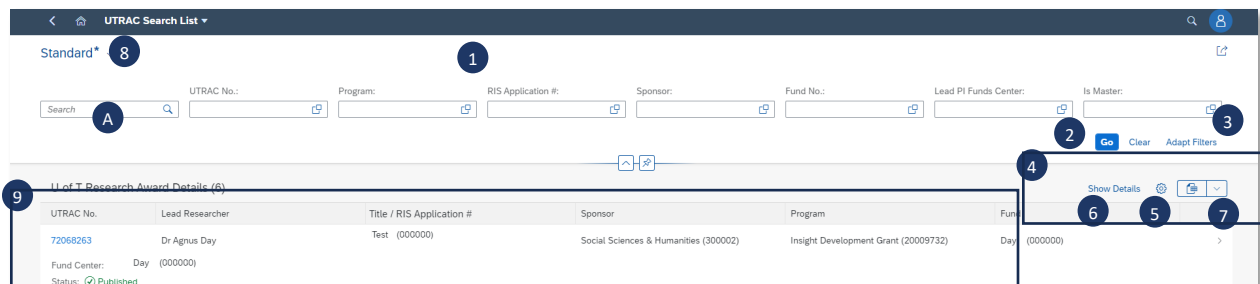
This will display a Home page that contains tiles that open different reports and tools in RIS, FIS, and HRIS. The tiles that are displayed in your view can vary depending on your role.

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.




### 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.

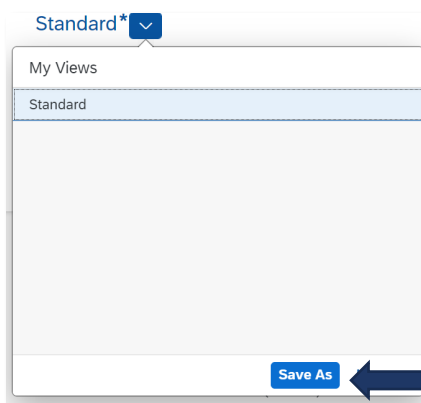
- **Sponsor:** The sponsor number for the agency, organization, or company that is funding the research. To search by sponsor name, click the  (double box) and use the sponsor name field.
- **Fund No:** Fund number assigned in FIS.
- **Lead PI Funds Center:** Funds Center corresponding to the primary 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.



Click “Save As” to save new default view

Save View

View:

Standard

☒ Set as Default
 ☐ Public
 ☒ Apply Automatically

Save

Cancel

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.

UTRAC No.	Lead Researcher	Title / RIS Application #	
72065496	Prof David	McLean Award (222981)	>
Sponsor	Connaught Fund (300743)		
Program	McLean Award (20002842)		
Funder			

Click the UTRAC number to open  
and view UTRAC details.

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

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

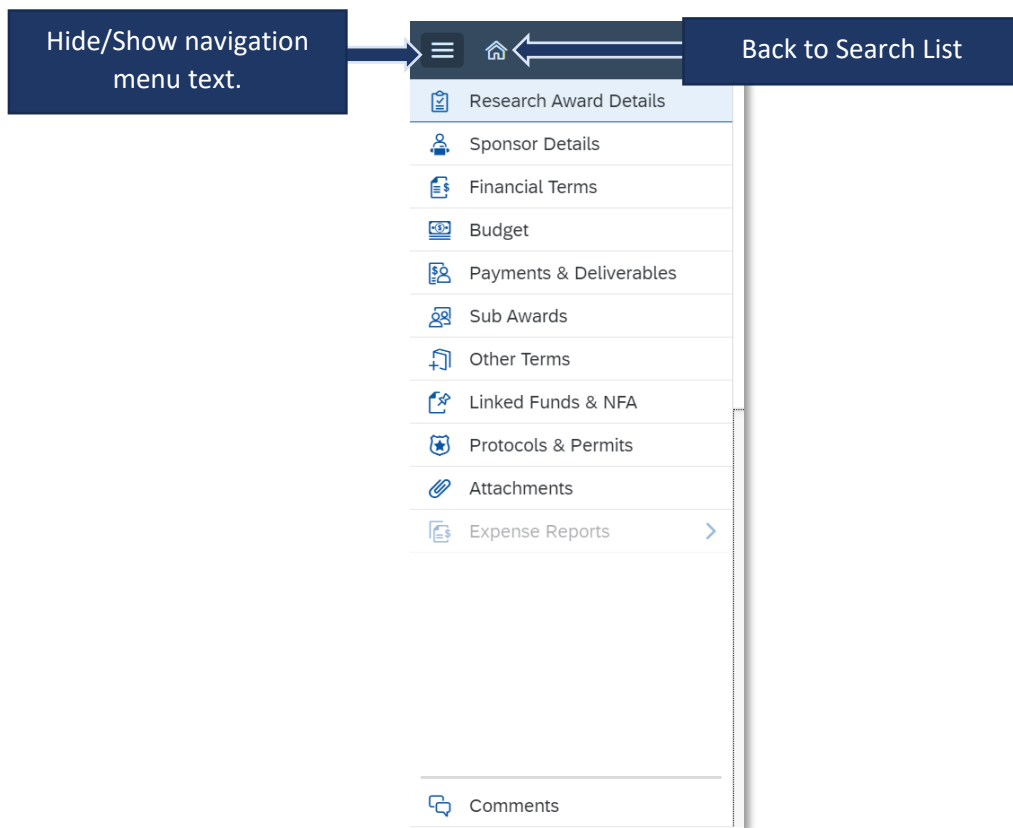
- **Version:** Version number (e.g. 1, 2,3, etc.)
- **Version Type:**
  - i. Original: First published version of UTRAC.

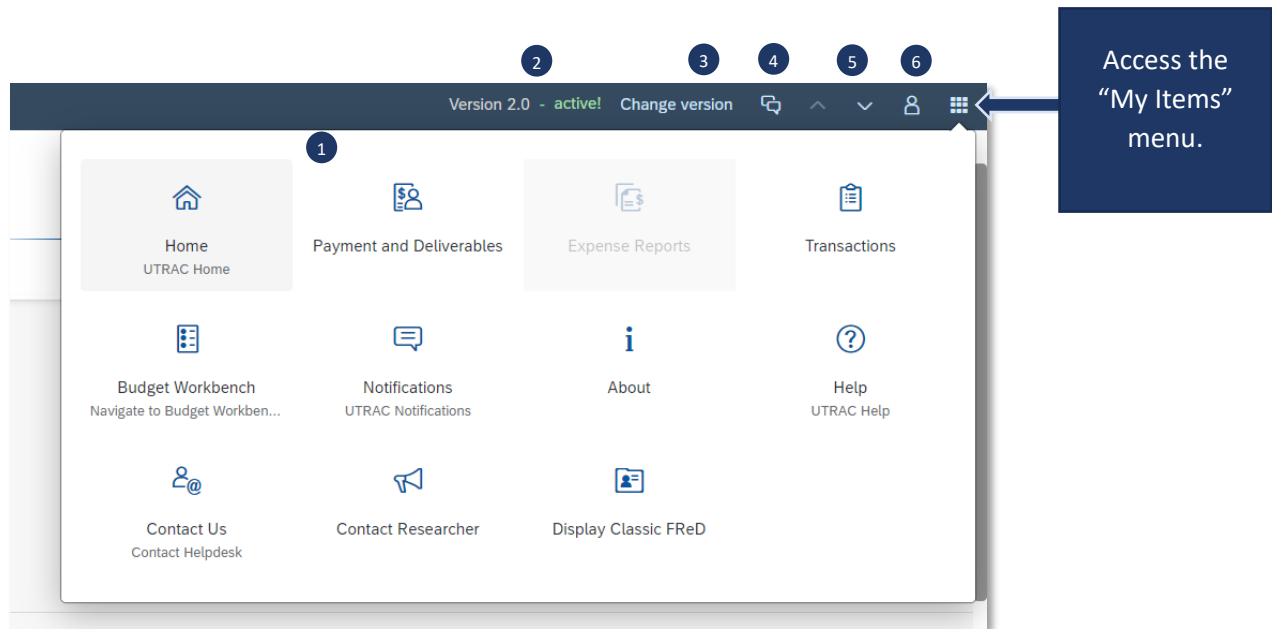


- ii. Revision: Revised version of the original UTRAC.
- **Published:**
  - i. Yes: This version is published.
  - ii. No: This version is not yet published; it is of Draft status and is being edited by the Research Officer.
- **Published Date:** Date this version was published by the Research Officer.
- ⓓ **Export:** Export version table as Excel file.
- ⓔ **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).
- ⓕ **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.

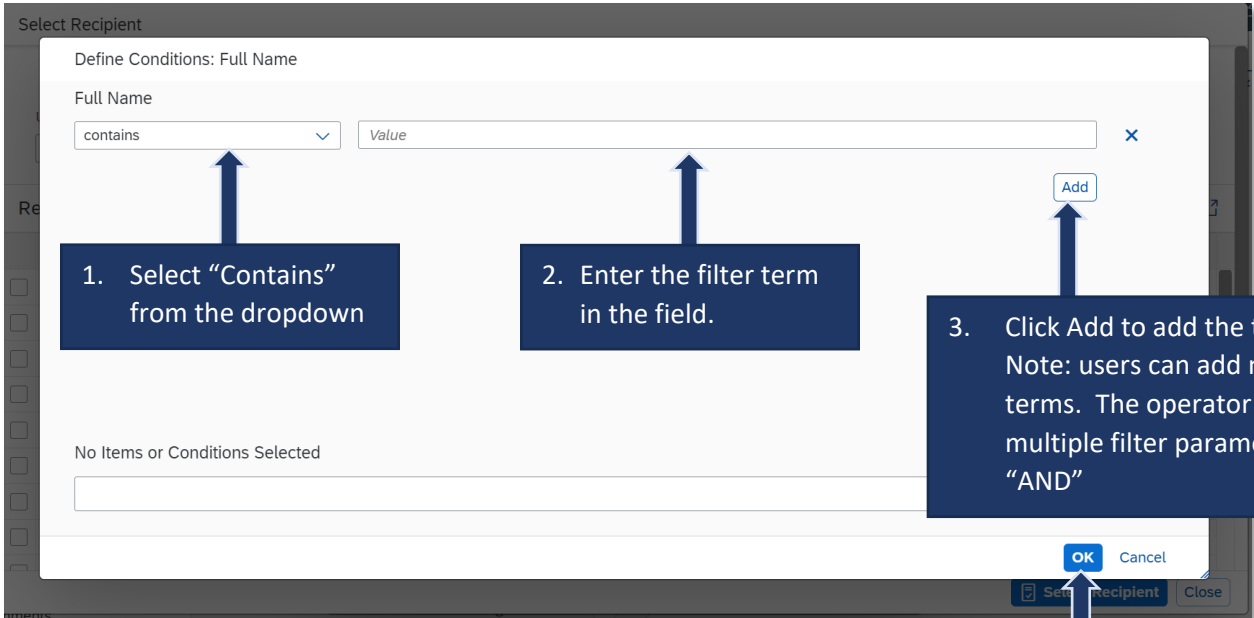
5 **Previous Page/ Next Page:** Navigate through each UTRAC section by going to the next/previous page using the arrows.

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.



1. Select “Contains” from the dropdown

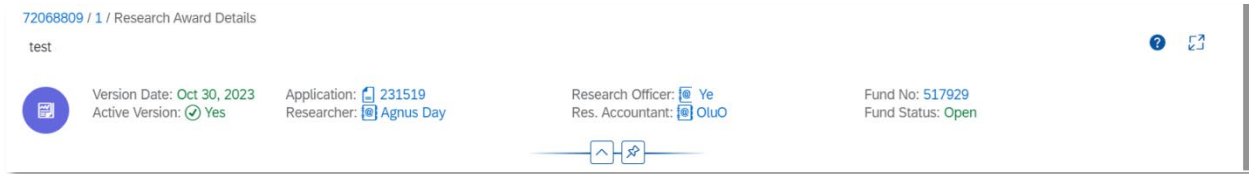
2. Enter the filter term in the field.

3. Click Add to add the term. Note: users can add multiple terms. The operator between multiple filter parameters is “AND”

4. Click OK then Go to filter and view results.

## Header

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



The screenshot shows the header of a UTRAC page. At the top left, it displays '72068809 / 1 / Research Award Details' and 'test'. Below this, there is a blue circular icon with a document symbol. To the right of the icon, the following information is displayed: 'Version Date: Oct 30, 2023', 'Active Version: Yes' (with a green checkmark), 'Application: 231519', 'Researcher: Agnus Day', 'Research Officer: Ye', 'Res. Accountant: OluO', 'Fund No: 517929', and 'Fund Status: Open' (in green). At the bottom center, there are two small icons: a square with an upward arrow and a square with a circular arrow.

- **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.

The screenshot shows the 'UTRAC Award Details' page for award 72066209. The page is divided into several sections. The 'Application Information' section shows the researcher as 'Dr Agnus Day' and the department as 'DEPT OF PHYSIOLOGY(173)'. The 'Research Award Details' section shows the award type as 'Funded', fund number as '000000', and the grant period from 'Apr 1, 2023' to 'Mar 31, 2025'. The 'Other' section shows the research officer as 'Day Ye' and the research accountant as 'Olu Eni'. The 'Contact me' button is highlighted in the bottom right corner.

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

The screenshot shows the same 'UTRAC Award Details' page, but with a 'Contact Details' modal box open. The modal box displays the contact information for the research officer, 'Day Ye', including their phone number, email address, and department. The 'Contact me' button is highlighted in the bottom right corner of the modal box.

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

The screenshot shows a contact form titled "Contact". It contains pre-filled information and a large text area for a message. Annotations with arrows point to specific parts of the form:

- An arrow points to the "Comments" text area with the text: "Write your message or question here."
- An arrow points to the "+" icon in the "Recipient List" section with the text: "You can add additional recipients from the '+' icon. For details on how to search, go to [Advanced Filters](#)."
- An arrow points to the "Send" button at the bottom right with the text: "Click send to send your message."

**Contact**

Contact M : directly for questions relating to application of University policies, regulations, and sponsor terms and conditions to your award or for questions relating to budget.

Phone:

Email:  
BLUEFORMUOFT@GMAIL.COM

Or you can fill out and submit the below form to send a query to Ms Wei Ye

**What would you like to tell Ye ?**

Sender Name:  
Dr Agnus Day

Sender Email:  
BLUEFORMUOFT2@GMAIL.COM

Sender Phone:  
416-978-2674

Subject:  
MR Funds: Fund : 000000 CFC : 000000

Comments:

**Recipient List**

Add Recipients(Click on '+' to add recipients)

ID *	Name	Email
Research Officer	Ye	BLUEFORMUOFT@GMAIL.COM

Send Close

## 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.

UTRAC Award Details

Research Award Details

Sponsor Details

Financial Terms

Budget

Payments & Deliverables

Sub Awards

Other Terms

Linked Funds & NFA

Protocols & Permits

Attachments

Expense Reports

72068209 / 1 / Research Award Details

test

Version Date: Jul 19, 2023  
Active Version:

Application: 000000  
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

1 Application Information

2 Other

Application: test

Researcher: Dr Agnus Day

Department: DEPT OF PHYSIOLOGY(173)

Is this a Master Agreement?: NO

Amendment Under Negotiation?: NO

Research Award Details

General Details

3

4 Other

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)

Research Accountant: Olu Eni

Research Officer: Day Ye

Cost Centre: MED:Physiology:Research 000000

Internal Order:

Minuet No.: -

Funds Center

5

Funds Center Details

View No Post

Funds Center: 000000

Parent Funds Center: MED:Physio Res(105984)

Lead PI: Yes

Cost Center: MED:Physiology:Research000000

Internal Order:

Versions

6

Available versions for Research Award

Version	Created Date	Active Version	Published	Published Date	Revision / Published Notes
1	July 19, 2023	Yes	Yes	September 14, 2023	asdf September 14, 2023 Show More

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-I.
- **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.

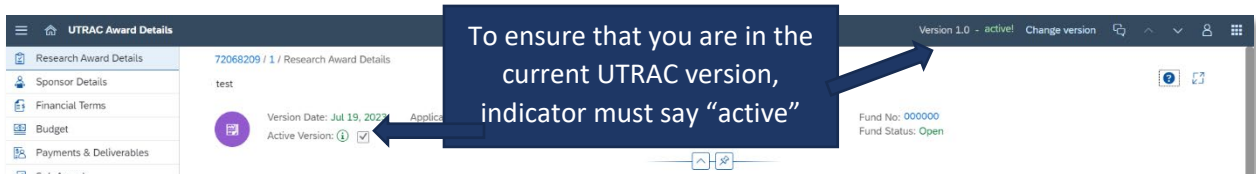
## 6 Versions

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 displays the 'UTRAC Award Details' interface. The left sidebar lists various sections: Research Award Details, Sponsor Details (selected), Financial Terms, Budget, Payments & Deliverables, Sub Awards, Other Terms, Linked Funds & NFA, Protocols & Permits, Attachments, and Expense Reports. The main content area is titled '72068209 / 1 / Sponsor Details' and includes a 'Post clone test' button. It features a header with version information (Version 1.0 - active! Change version) and a status bar. The 'Sponsor Details' section is highlighted with a blue circle '1' and contains the following information: Sponsor: Social Sciences & Humanities(300002), Program: Insight Development Grant(20009732), Division: Insight and Connection(10005098), Customer ID: Social Sciences & Humanities Research Council(300002), and Sponsor Reference: asdf. The 'Other Details' section is highlighted with a blue circle '2' and contains a 'Sponsor Additional Information' field with a rich text editor. The text in the field reads: '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@sshr-csrh.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 displays the 'UTRAC Award Details' page, specifically the 'Financial Terms' section. The page is titled '72068209 / 1 / Financial Terms' and includes a 'Post clone test' button. The main content area is divided into several sections, each with a numbered icon (1-5) and a title. Section 1, 'Payment', shows 'Sponsor Approved Amount: 100,000.00 CAD' and 'In-Kind Contribution: 0.00 CAD'. Section 2, 'Holdback', shows 'Percentage: 0.00' and 'Amount: 0.00 CAD'. Section 3, 'Carryforward', shows 'Rule: 100%(A)'. Section 4, 'Overhead', shows 'Overhead Distribution' and 'Calculation Rule: Automated | Manual | None'. Section 5, 'Other Details', shows a list of items: 'Carry Forward Details', 'Budget Transfer Rule', 'Extension Rule', 'Eligible Expenses', 'Ineligible Expenses', and 'Overhead'. A red box highlights the 'Carry Forward Details' item in the list. The page also includes a sidebar with navigation links and a top bar with version information.

UTRAC Award Details

Version 1.0 - active | Change version

72068209 / 1 / Financial Terms

Post clone test

Version Date: Jul 19, 2023  
Active Version: ☒

Application: 000000  
Researcher: Dr Agnus Day

Research Officer: Day Ye  
Res. Accountant: Olu Eni

Fund No: 000000  
Fund Status: Open

General Information | Overhead | Other Details

**Payment** 1

Sponsor Approved Amount: 100,000.00 CAD  
In-Kind Contribution: 0.00 CAD

**Holdback** 2

Percentage: 0.00  
Amount: 0.00 CAD

**Carryforward** 3

Rule: 100%(A)

**Overhead** 4

Overhead Distribution  
Calculation Rule: Automated | Manual | None

**Other Details** 5

Carry Forward Details  
Budget Transfer Rule  
Extension Rule  
Eligible Expenses  
Ineligible Expenses  
Overhead

Comments

### 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.

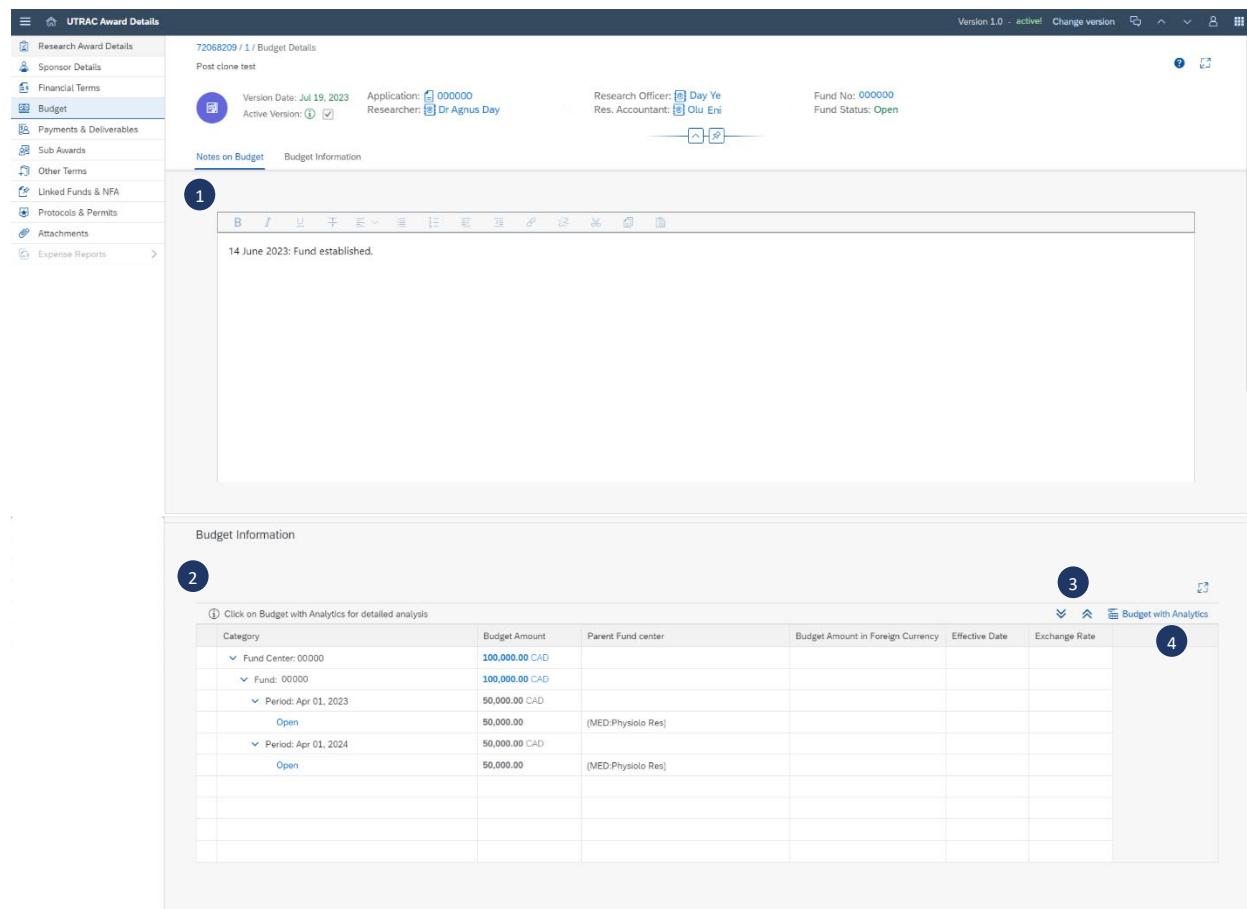
- **Carry Forward Details:** Additional information related to the carry forward rule for unspent balance between budget periods set by the Sponsor, if applicable.
- **Budget Transfer Rule:** Information related to any restrictions on transferring budget between budget categories and steps that need 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.



**UTRAC Award Details** | Version 1.0 - active | Change version

Research Award Details: 72068209 / 1 / Budget Details  
Post clone test

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

**1** Notes on Budget | Budget Information

14 June 2023: Fund established.

**2** Budget Information


**3** 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)			



**4** Budget with Analytics

- 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.

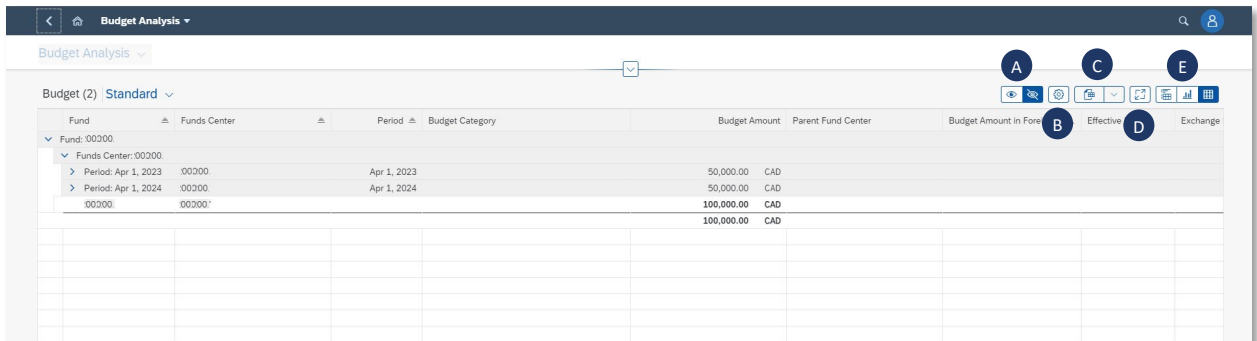
## 2 Budget Information

- 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



Fund	Funds Center	Period	Budget Category	Budget Amount	Parent Fund Center	Budget Amount in Foreign Currency	Effective Date	Exchange Rate
Fund: 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			

- A Show Items:** Either shows all budget data in table view, or only shows data based on selection on the chart visualization.
- B Settings:** Add additional columns or remove listed columns. Users can also shuffle the order of the columns using .
- C Export:** Export budget data as an Excel file.
- D Full Screen:** Minimize/maximize section.
- E 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.

UTRAC Award Details

72068209 / 1 / Payments & Deliverables

test

Version Date: Jul 19, 2023  
Active Version: 1

Application: 000000  
Researcher: Dr Agnus Day

Research Officer: Day Ye  
Res. Accountant: Olu Eni

Fund No: 000000  
Fund Status: Open

Research Award Details

Sponsor Details

Financial Terms

Budget

Payments & Deliverables

Sub Awards

Other Terms

Linked Funds & NFA

Protocols & Permits

Attachments

Expense Reports

General Information

Payment Method

Deliverables

Other Details

Payment Details

Approved 1

Expected 2

Sponsor Approved Amount: 100,000.00(CAD)  
Holdback Percentage: 0.00  
Holdback Amount: 0.00(CAD)  
Difference: 100,000.00(CAD)

Total Expected Amount: 100,000.00(CAD)  
Expected holdback: 0.00(CAD)  
Difference: 100,000.00(CAD)

Payment Method

Payment methods / Activity types 3

4

Activity Type  
Fixed Instalments

Frequency  
Annual

Expected Amount  
100,000.00

Deliverables 5

Deliverables

Deliverable  
Financial Reporting

Frequency

Payment Driver  
No

Required  
No

Deliverable  
Audit

Frequency

Payment Driver  
No

Required  
No

Deliverable  
Progress Report

Frequency  
Irregular

Payment Driver  
No

Required  
Yes

Other Details 6

Methods of Payment-Other

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	Frequency	Expected Amount	Scope Start Date	Scope End Date	Deduct Holdback per Invoice
<div>  Invoiced - fixed </div>	Annual	100,000.00	Apr 1, 2024	Mar 31, 2024	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.

4 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	<div>   Scheduled </div>
Final	50,000.00	Apr 1, 2025	Apr 1, 2024	Mar 31, 2025	<div>   Scheduled </div>

- **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 <sup>△</sup> K

Hold 0

Payment Other Types 100K Fund Start Apr 1, 2023 Fund End Mar 31, 2025

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 <sup>△</sup> K

Hold 0

Payment Other Types 100K

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:

↑

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

Assign Notification Roles: Principal Investigator (PI)

Notification Frequency before Due Date

Frequency Days:




**More Details**

i Deliverables Schedule A

Report Type	Requested Amount	Due Date	Scope Start	Scope End	Notification
Interim	0.00	Mar 31, 2024	Apr 1, 2023	Mar 31, 2024	<span style="color: red;">⊗</span>
Final	0.00	Mar 31, 2025	Apr 1, 2024	Mar 31, 2025	<span style="color: green;">⊗</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)  Notifications are OFF: No user(s) will be sent any notification for the selected deliverable(s).

#### **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.

#### **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 displays the 'UTRAC Award Details' interface. The left sidebar contains a navigation menu with items: Research Award Details, Sponsor Details, Financial Terms, Budget, Payments & Deliverables, Sub Awards (highlighted), Other Terms, Linked Funds & NFA, Protocols & Permits, Attachments, and Expense Reports. The main content area is titled '72068939 / 2 / Sub Awards'. It includes a header with version information (Version 2.0 - active!, Change version) and user details (Research Officer: Safa, Res. Accountant: Vanessa, Fund No: 518031, Fund Status: Open). Below this, there's a 'General Information' tab and a 'Sub-Awards Details' tab. The 'Sub-Awards Details' tab is active, showing 'Amount Details' with fields for Sponsor Approved Amount (300,000.00(CAD)), Holdback Percentage (10.00), Holdback Amount (30,000.00(CAD)), and Difference (270,000(CAD)). Below this is a 'Sub-Awards Details' section with a table of award details. The table has columns: Vendor/Sub-Awardee Institution, Researcher, Default, and Payments & Deliverables / Documents. The first row shows 'Baycrest Centre(114381)' as the institution, 'Rob Bob' as the researcher, and a 'Default' checkbox. The 'Payments & Deliverables / Documents' column contains buttons for 'Display Schedule', 'Display Address', and 'View Attached IIA Docs'. Below the table, there are fields for 'Hold Item', 'Sub-Award Type' (set to 'Original'), 'IIA Details' (Amount: 10,000.00, Currency: CAD, Holdback %: 0.000), 'Commitment Item' (EQUIP-S), 'Period From' (May 1, 2023), and 'Period To' (Apr 30, 2026). A 'Comments' section is at the bottom left.

Vendor/Sub-Awardee Institution	Researcher	Default	Payments & Deliverables / Documents
Baycrest Centre(114381)	Rob Bob	<input type="checkbox"/>	<a href="#">Display Schedule</a> <a href="#">Display Address</a> <a href="#">View Attached IIA Docs</a>

Hold Item: ☐ Sub-Award Type: Original

IIA Details:  
Amount: 10,000.00 Currency: CAD Holdback %: 0.000  
Commitment Item: EQUIP-S  
Period From: May 1, 2023 Period To: Apr 30, 2026

- 1 **Vendor/Sub-Awardee Institution:** The organization or institution that will be receiving the funding from U of T.
- 2 **Researcher:** Name of the Co-Investigator (Co-I) at the Sub-Awardee Institution.
- 3 **Payments & Deliverables / Documents:**
  - o **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.
  - o **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).

**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 displays the 'UTRAC Award Details' interface. The left sidebar lists various sections, with 'Other Terms' selected. The main content area is titled '72068209 / 1 / Other Terms' and includes a 'test' label. Below this, there are fields for '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'. A tabbed interface shows 'Intellectual Property', 'Equipment Ownership', 'Publications', 'Copyright', 'Inventions', and 'Other'. The 'Intellectual Property' tab is active, showing a text area with the following content: 'Ownership of all intellectual property generated in the performance of this research project is in accordance with University of Toronto policies. [For more details, refer to - Inventions Policy - Copyright Policy](#)'. The 'Equipment Ownership' tab is also visible, showing: 'Ownership of equipment purchased with grant funds is in accordance with University of Toronto policies. [For more details, refer to - Guide to Financial Management - Capital Assets](#)'. The 'Publications' tab shows: 'Dissemination of research project results and publication rights are governed in accordance with University of Toronto policies. [For more details, refer to: Publication Policy](#)'. Each text area is preceded by a numbered circle (1, 2, 3) indicating the section order.

1

2

3





- 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 displays the 'UTRAC Award Details' page for award 72068939 / 2 / Linked Funds & NFA. The page is divided into three main sections: 'Linked UTRAC's details', 'Linked Funds( Same MRA )', and 'Non-Funded Research Agreement'.

**Linked UTRAC's details (1):** This section shows a table of linked UTRACs. The table has columns for UTRAC ID, Fund, Is Master?, Sponsor Ref., and Sponsor. A single entry is shown with UTRAC ID 72000030, Fund 407068, Is Master? No, and Sponsor Natural Sciences & Engineering(300001). Below the table, additional details are provided: Program: Industrially Oriented Research Grants(20000071), Researcher: Prof Paul, Application: Technologies in support.

**Linked Funds( Same MRA ) (2):** This section shows a table of linked funds. The table has columns for UTRAC ID, Fund, and Sponsor. No linked funds are displayed, with the message 'No Linked Funds to display'.

**Non-Funded Research Agreement (3):** This section shows a table of non-funded research agreements. The table has columns for Agreement No., Type, Status, and Effective Date. A single entry is shown with Agreement No. 50000004, Type Material Transfer Agreement (MTA), Status Executed, and Effective Date Aug 6, 2019. Below the table, additional details are provided: Expiry Date: Sep 1, 2021, Title: Quantification of FZD2.

### 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.

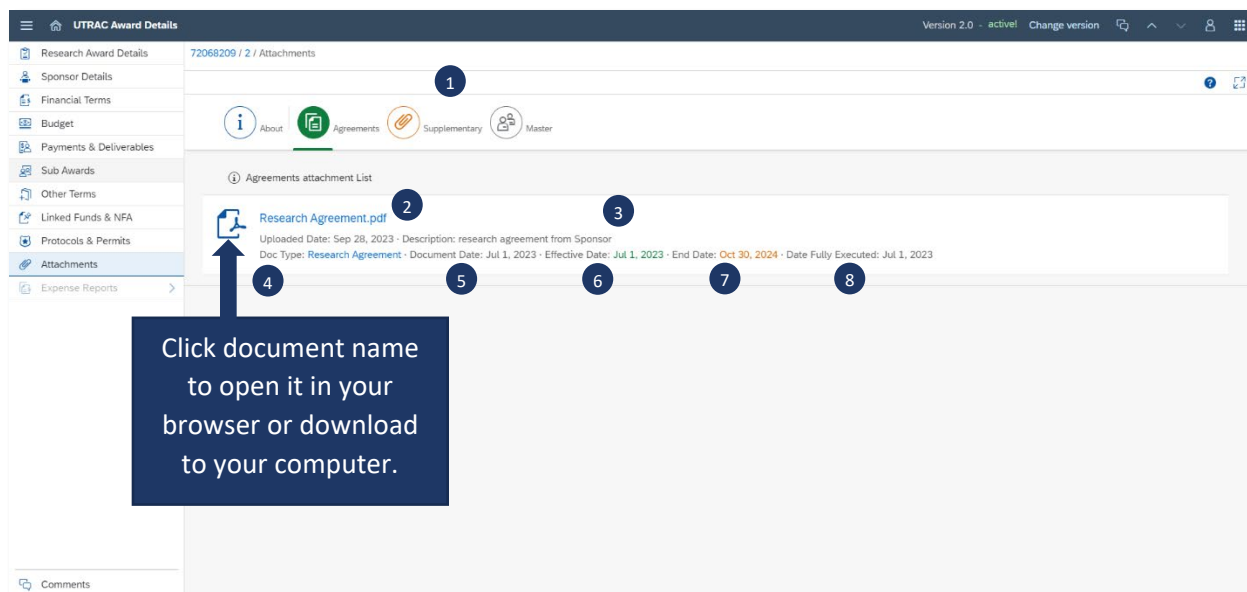
1. **Type:** Category of protocol or permit (Animal, Human, or Health & Safety).
2. **Protocol:** RIS ID number assigned to the protocol or permit.
3. **Title:** The title of protocol or permit.
4. **Expiry:** Date on which the protocol will expire / has expired.
5. **Status:** The current status of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



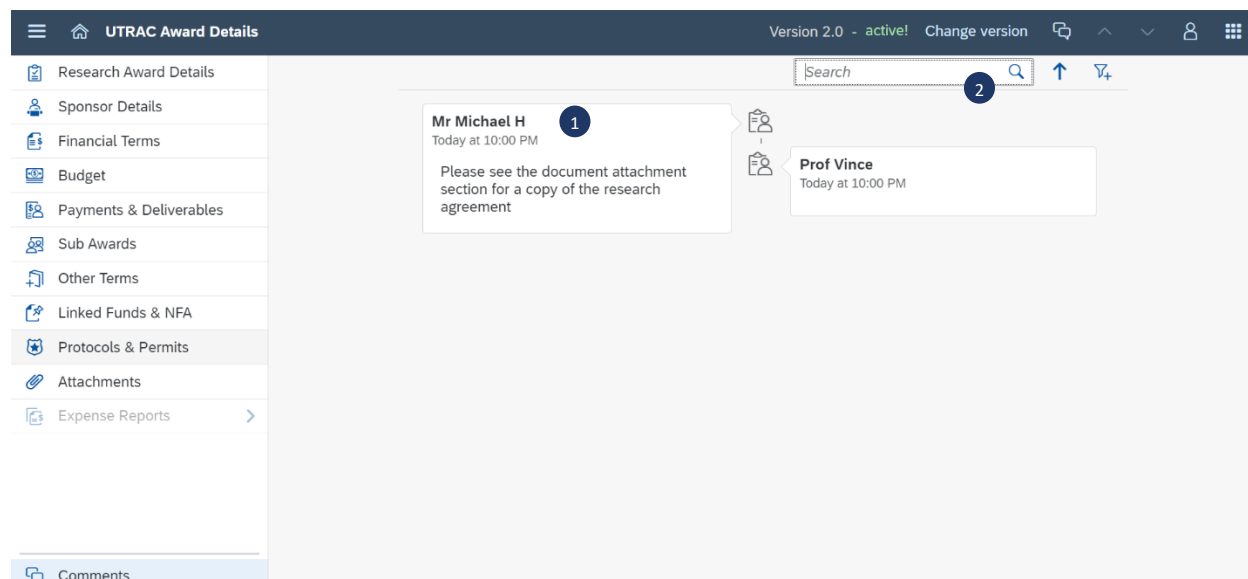
- 1 **Document categories:**
  - **Agreements:** Documents that can include research agreements, notice of awards, and amendments.
  - **Supplementary:** Documents that can include progress reporting templates, Sponsor policies, etc.
  - **Master:** Master agreement-related documents.
- 2 **Document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



- 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)	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. 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.	See <a href="#">PI Eligibility Guidelines</a> for instructions on how to request exceptional case PI eligibility.

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.

The screenshot displays the 'Funds Center Details' section of the UTRAC Research Award Details screen. It features a table with the following data:

Funds Center	Parent Funds Center	Lead PI	No Post
(200127)	MED:Physiolo Res(105984)	✓ Yes	Yes

Below the table, the following details are listed:

- Cost Center: MED:Physiology:Research(10326)
- Internal Order: -

A blue button labeled 'View No Post' is located in the top right corner of the table. A blue arrow points from a dark blue callout box at the bottom right, which contains the text 'Click View No Post', to the 'View No Post' button.



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)	✓ Yes	⚠ 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

Protocol/Permit:

20001790

Fund Center:  
 200127

Reason\*:

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)	⚠ ... Nov 13, 2023 / Mark	Show Message				Nov 13, 2023 / Mark
Mark	Nov 13, 2023	20001151 Human Protocol	200127 (Lead)	✓ ... Nov 13, 2023 / Mark	Show Message	Mark	Nov 13, 2023	Show Message	Nov 13, 2023 / Mark

Close

### 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.