



Operating Funds Transfer to Research Account Request (Non-Start-Up)

This form is to be used to transfer operating funds to a research account
(10-x-xx-xxxxxx-xxxxxx to 60-x-xx-xxxxxx-xxxxxx)

For start-up research funds transfers, please use the *START-UP Research Account Fund Transfer Request* form

Principal Investigator Information

PI Name

Department/Faculty

Research Account Information

Is a new Research Account required?

Yes (Complete Section A)

No (Complete Section B)

Section A - New Research Account Required:

Project Start Date

Project End Date

Please attach a document with the following information:

- The title for the research/scholarly project & description of the research/scholarship that will be supported
- The specific research/scholarly activities to be undertaken (i.e. what they are, when they will happen, & where they will happen)
- The anticipated results
- A budget of how the funds will be spent (include categories such as salaries & benefits, travel, equipment, materials & supplies, professional services)

Section B - Existing Research Account Exists:

Existing Account Number

Please explain the reason for the transfer to an existing research account:

Existing Project ID

Romeo Number

If more space is required, please attach a separate document

Transfer Information

Account(s) from which the funds will be transferred:

Operating Account Number	Project ID (if applicable)	Transfer Amount (\$)	Account Authority Name	Account Authority Signature

Note: An Account Authority cannot approve transfer of funds to their own research project

Total Transfer Amount

Fiscal Year of Transfer

One-Time
Annually*

*If transfer is to occur annually, please attach a document with additional details regarding the annual transfer, i.e. dates, amounts, reason, etc.

Required Signatures

Principal Investigator

Individual Responsible for the Research

Name

Signature

Date

Office of Research Services

Approval of Research Activities

Name

Signature

Date

Finance

Budget Approval

Name

Signature

Date

Protection of Privacy - The personal information requested on this form is collected under the authority of Section 31(c) of the PEI Freedom of Information and Protection of Privacy Act and will be protected under Part 2 of that Act. It will be used for the purpose of transferring funds to a research account. Direct any questions about this collection to Financial Services, University of Prince Edward Island, 550 University Avenue, Charlottetown PE C1A 4P3 (902)566-6000.