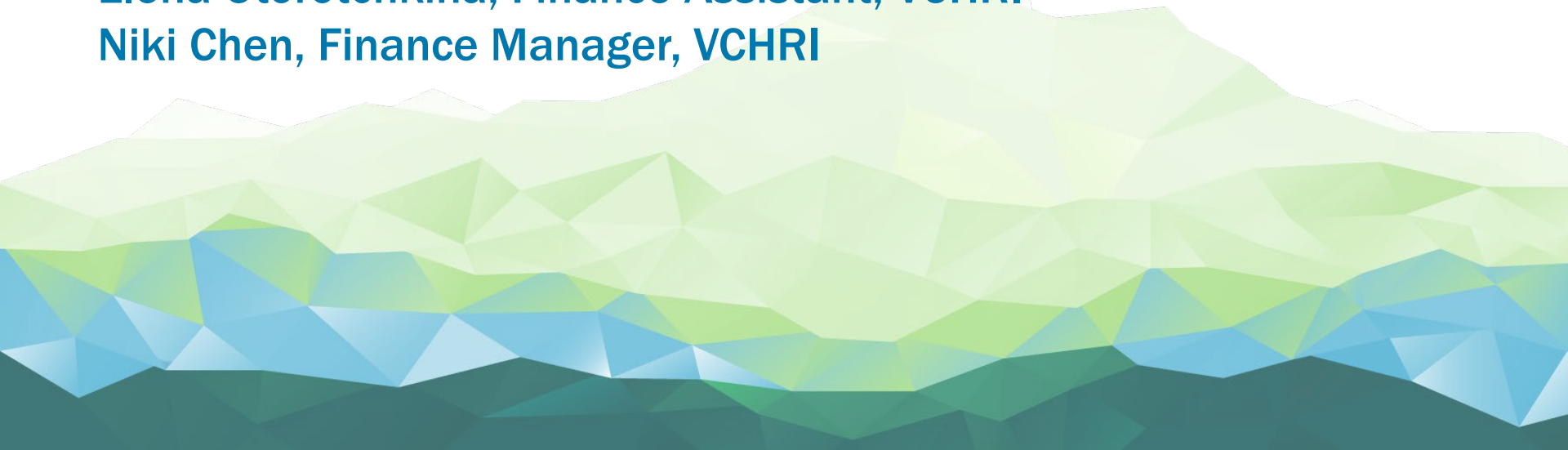


KNOWLEDGE TRANSLATION CHALLENGE

Finance Info. Session – Sept. 17, 2024

Elena Otorotchkina, Finance Assistant, VCHRI
Niki Chen, Finance Manager, VCHRI



Key elements in your award letter dated on June 7th

➤ Award term : 2 years from July 1, 2024, to June 30, 2026

➤ Awarded amount : \$5,000

➤ Financial and Reporting Requirements

1. All expenses are submitted to and reviewed by the VCHRI Awards Team.

2. Any unspent or residual funds at the end of the grant timeline will be returned to the funder.

3. Final written report is required at the end of the grant timeline. VCHRI, and where applicable the funder, will use these reports to publicize activities and evaluate the impact of the award program.

4. This award does not allow research equipment costs nor gift cards.”

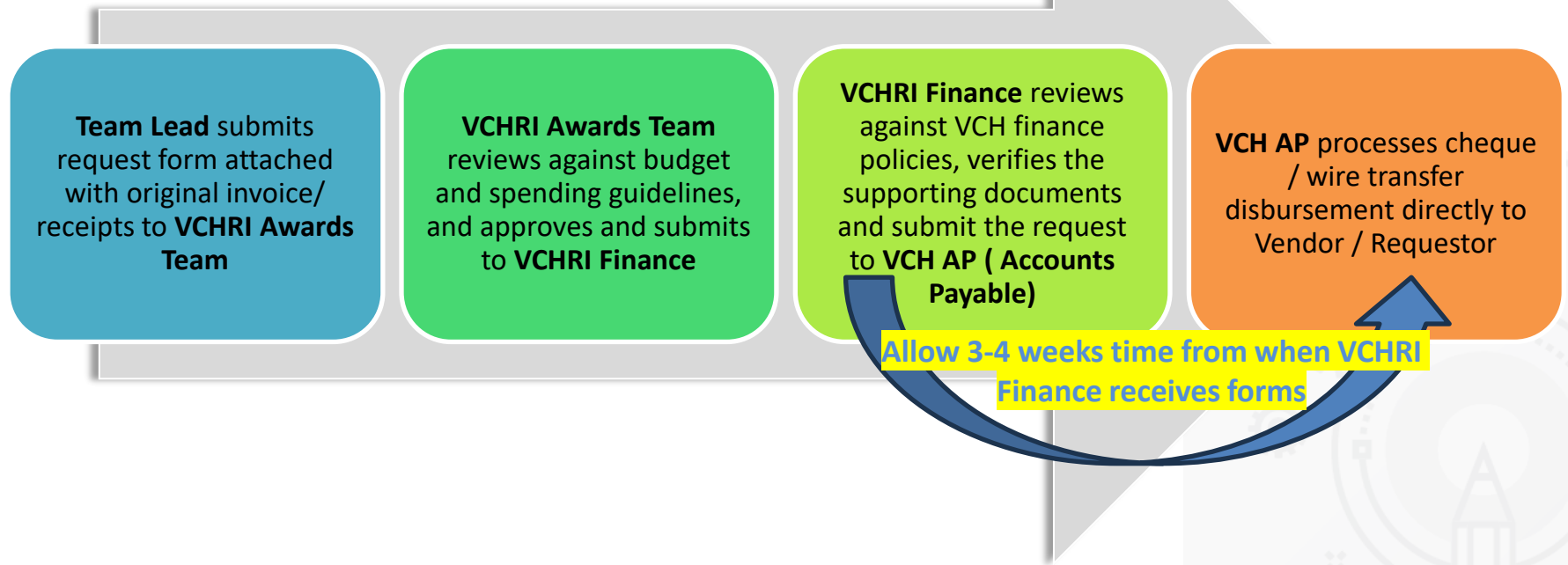
KNOWLEDGE TRANSLATION CHALLENGE

Expenses claim and funds disbursement

- No advance, receiving funds through reimbursement or payments directly to vendors after submitting claims/invoices to VCHRI.
- All project spending and transactions must follow VCH Financial Policies and Procedures.
- Funds are held in a VCHR cost center and claims and disbursements will be reviewed and processed only quarterly.

- The Team Lead is responsible to track your project spending against award BUDGET
- Change of BUDGET (=<20% or \$1,000) should be notify VCHRI in writing and approved by VCHRI Awards Team

Claim and Disbursement Process and Steps at VCH



KNOWLEDGE TRANSLATION CHALLENGE

Two different types of forms for different claims

Honorarium

- A. Payment for hours worked in addition to regular shift (outside of regular working hours).
- B. A voluntary payment made to a person for services for which fees are not legally or traditionally required, typically used to help cover costs for volunteers or guest speakers.
- C. Do not represent a service contract. / Are not an entitlement, as there is no expectation of payment in exchange for the service rendered. / Are not recurring payments to the same individual.

Expenses

Payment for goods/services:

- A. Expense Reimbursements
- B. Vendor Invoices
- C. Research Participant Incentives

KNOWLEDGE TRANSLATION CHALLENGE

Honorarium



Honorarium

What is an Honorarium?

A monetary token of appreciation given to an individual for providing a service on the project.

Who can receive an Honorarium?

- A. Team members who performed work on the project
- B. Non-team members who performed work on the project



Example: a person who consults on data processing

Honorarium

- A. Honorariums will be paid out on a Quarterly basis, submit near end of the quarter
- B. Use the [Honorarium Request Form](#) (all fields mandatory)
 - Pay attention to:
 - Payee SIN number
 - Required for all payees. Do not leave this field blank.
 - Payee VCH Employee ID number
 - Employee ID must be provided. If non-VCH employee, then you must note “N/A”. Do not leave this field blank.
- A. **Payment method**
 - VCH employees will be paid via Payroll process (it will show on pay stub)
 - Non-VCH employees will receive payment via cheque unless they request Direct Deposit/EFT
 - A form has to be filled out, signed, and submitted with void cheque

Honorarium Request Form

<https://www.vchri.ca/award-application-forms-and-resources>

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Honorarium Request Form
Research Challenge and Knowledge Translation
Non-Employees: T4A will be issued for payments of over \$500/year for tax purposes
Employees: Payments will route through payroll and will impact taxes

Claim Date:
Payee Name:
Payee SIN:
Payee VCH Employee ID: ***EMPLOYEE ID OR N/A***
Payee Home Address:
Payee Email:
Team Lead Name:

Description of services provided

Dates and Times Worked

Dates and Times Worked	Hours	Rate	Total
<i>Example: May 5th, 2024 12pm-4pm</i>	4	\$20.00	\$80.00
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Grand Total:

Signature of Payee*:
*signature is confirmation that the hours claimed above were worked in addition to your regular payroll hours

Signature of Team Lead*:
*signature approval confirms that the hours claimed above were worked in addition to regular payroll hours

For internal use only

Awards Approval:	First Name	Last Name	Signature	Fund allocation:
Additional Description:	Program	Year	Team lead	<input type="checkbox"/> RHNH <input type="checkbox"/> Non-RHNH <input type="checkbox"/> RHNH Admin <input type="checkbox"/> Other

Robert H.N. Ho Research Centre, 6/F, 2635 Laurel Street, Vancouver, BC V5Z 1M9
www.vchri.ca

Honorarium Request Form

top of form



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Honorarium Request Form

Research Challenge and Knowledge Translation

Non-Employees: T4A will be issued for payments of over \$500/year for tax purposes

Employees: Payments will route through payroll and will impact taxes

Claim Date:

Payee Name:

Payee SIN:

Payee VCH Employee ID:

EMPLOYEE ID OR N/A

Payee Home Address:



Payee Email:

Team Lead Name:

Description of services provided

Example 1

Transcription services provided by Non-team member

Honorarium Request Form
 Research Challenge and Knowledge Translation
Non-Employees: T4A will be issued for payments of over \$500/year for tax purposes
Employees: Payments will route through payroll and will impact taxes

Claim Date: 28-Oct-22
 Payee Name: [Redacted]
 Payee SIN: [Redacted]
 Payee VCH Employee ID: N/A - Patient Partner ***EMPLOYEE ID OR N/A***
 Payee Home Address: [Redacted]
 Payee Email: [Redacted]
 Team Lead Name: [Redacted]

Description of services provided
 Patient Partner for KI [Redacted] Project. [Redacted] helped in the creation of an informational communication flyer that would be shared with patients and loved ones. [Redacted] participation consisted of two - 1 hr meetings and 1 hr independent review of the flyer and KT challenge project.

Dates and Times Worked	Hours	Rate	Total
<i>Example: May 5th, 2015 12pm-4pm</i>	3	\$20.00	\$60.00
February 23, 2022 (1400-1500)	1	\$20/hr	\$20.00
March 28, 2022 (1000-1100)	1	\$20/hr	\$20.00
Independent time reviewing documents	1	\$20/hr	\$20.00
Grand Total:			\$60.00

Signature of Payee*: [Redacted]
*signature is confirmation that the hours claimed above were worked in addition to your regular payroll hours

Signature of Team Lead*: [Redacted]
*signature approval confirms that the hours claimed above were worked in addition to regular payroll hours

VCHRI Approval: [Redacted]

Fund allocation:
 RHNH
 Non-RHNH
 RHNH Admin
 Other

Additional Description: Program: [Redacted] Year: [Redacted] Team lead: [Redacted]

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www.vchri.ca

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Expense



Expenses

A) Expense Reimbursements

- **Purchased out of pocket by team members**

Examples: Office supplies, project materials, catering, patient expenses

- **Purchased from businesses with valid invoice and GST number**

- **Ineligible purchases**

- It's paid out-of-pocket but a valid business receipt cannot be obtained.

- This includes but is not limited to:

- payments you make directly to individual people for helping on your project (*i.e. a service fee*)
- purchases made on Facebook Market or Craigslist (*i.e. goods*)
- purchases made through friends/individuals that are not a registered business

- Ineligible expenses are not accepted by VCH Accounts Payable, and you will not receive reimbursement.

- Submit an [Expense Claim Form](#) and attach all original, **itemized receipts** or patient tracking lists. Photocopied receipts are not accepted.

Expense Claim Form

top of form



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Expense Claim

Research Challenge and Knowledge Translation

Include all original and itemized receipts for reimbursement

Only one receipt per line below - All fields are mandatory

Your claim will be reviewed for appropriate expenses

Claim Date:

PI Name:

Payee Name:

Payee Employee ID:

Payee SIN:




Home Address:

Phone or email:

Example 2

Out of pocket purchase for meeting/catering supplies

1.

\$5,000抽獎等您拿! 
 Monthly chances to win \$5,000!
 歡迎上網或掃描二維碼參加顧客滿意度評分!
Tell us how we did today! 
 如果您滿意，請向您的親友推薦來大統華購物吧!
 How likely are you to recommend T&T to your friends?

 Visit: www.storeopinion.ca or
 Call 1-877-234-2322 for full contest rules.

T&T Supermarket
 #106 2800 E 1st Ave., Vancouver, B.C., V5H 4H0
 Ph: (604) 254-9668 / Gst# 135747137H
 05/25/18 1:48:10 PM

031258322	10.00
FOOD	
COCOA VANILLA BUTTER BISCUIT	U \$5.99 U
(SALE) PASTRY BUTTER CAKE	U \$4.99
GREEN BEAN PASTE PASTRY	U \$5.99 U
SHISHI PARTY TRAY- C (58PCS)	U \$35.99 U
PRODUCE	
6IN ORCHIDS(2PC)-U/D POT	U \$17.88 G
SERVICE COUNTER	U \$0.04 G
T&T SHOPPING BAG	\$0.00
Points 60	

SUB TOTAL	\$70.86
GST	\$3.29
PST	\$1.25

TOTAL	\$75.42
Visa	\$75.42
Total points in this transaction: 60	
Points balance	: 2020
Item count: 6	
05/25/18 1:48:10 PM	

Vicky

2.

Starbucks Coffee Canada #4389
 7010 Kerr Street
 Vancouver, BC V5S 4W2

CHK 725782
 05/28/2018 05:31 PM
 2475982 Drawer: 1 Reg: 1

Coffee Traveler	15.00
Coffee Traveler	15.00
Mastercard	31.50
XXXXXXXXXXXX0043	

Subtotal	\$30.00
GST 5%	\$1.50
Total	\$31.50
Change Due	\$0.00

Check Closed
 05/28/2018 05:31 PM

To pick up on May 30



Example 3

Out of pocket for patient/participant expenses - tracking sheet

LOGY RESEARCH		
_____ (NAME OF MEETING)	25 JAN 2021 (V7) & 26 APR 2021 (V9) (DATE(S) ATTENDED)	
PLEASE ATTACH ALL <u>ORIGINAL</u> RECEIPTS AND ALLOW 2-4 WEEKS FOR PROCESSING *** For participant expenses, please attach the relevant section of the ICF describing this ***		
NAME	ADDRESS	CITY/PROVINCE
		COMOX, BC
	TELEPHONE	POSTAL CODE
		V9H 1P4
	DETAILS	TOTAL (local currency) & CDN \$
ACCOMODATION (Hotel)		
GROUND TRANSPORT (km x rate)		
MEAL EXPENSE (see below)		
	TRAVEL EXPENSE (FERRY) V7	\$17.15
OTHER	TRAVEL EXPENSE (FERRY) V9	\$35.10
	TRAVEL EXPENSE (PARKING) V9	\$31.25
TOTAL EXPENSES:		\$83.50
THE FOLLOWING EXPENSES WILL BE REIMBURSED: 1. Round trip economy airfare to the meeting destination. 2. Meal expenses incurred during travel to and from the meeting: Total = \$60.00 (\$14.00 Breakfast, \$16.00 Lunch, \$30.00 Dinner) (includes GST & gratuities) (rates reflect both Cdn & US dollar values) Alcoholic beverages not included. <u>Original</u> receipts must be submitted. 3. Round trip ground transportation between your home, airport, as well as parking at the airport. Mileage will be reimbursed at \$.49/km. (UBC Travel Policies: www.travel.ubc.ca/) 4. Transportation to and from meeting sites. 5. Overnight (hotel) accommodation.		
SIGNATURE		DATE
		27 Jul 2021
I certify that these expenses will not be claimed from any other source.		
Please return to: _____ Name, role, department, address, phone number and email address		

Example 4

Purchase of supplies from business vendor

 Room 217 Care through Music		Box 145 Port Perry, ON L9L 1A2		Sales Invoice	
Invoice To [Redacted] North Vancouver, BC [Redacted]		Ship To [Redacted] North Vancouver, BC [Redacted]		Date 6/18/18	Invoice # 7178
		Rep	P.O. No.	Terms PAID With Thanks	
Item	Description	Qty	Rate	Sales Person	Amount
SH21705	Warm Breezes CD	1	19.95		19.95
Shipping	Shipping & Handling		5.95		5.95
	GST On Sales		12.00%		2.40
	PST On Sales		0.00%		0.00
					
CRA Business Number 857285092					
Thank you for helping us Care through Music.					
Please note that 2% interest per month will be charged on Unpaid balances past 30 days.				Total	CAD 28.30
				Payments/Credits	CAD 0.00
				Balance Due	CAD 28.30

Expenses

B) Vendor Invoices

- **Purchase of supplies or services where the vendor bills VCHRI for payment**

Examples: Café Ami, LifeLabs, ProHealth Clinical Research Inc.

- **Payments are made directly from VCH to the vendor**
- **Must be a registered business entity with GST number**

Example 5

Interpreting services; Invoice billed to VCHRI

STILL INTERPRETING INC.
3469 Mons Drive,
Vancouver,, British Columbia V5M 3B5

INVOICE

Invoice No.: 10369
Date: 06/30/2022
Ship Date:
Page: 1
Re: Order No.

Sold to:
V.C.H.R.I.
6/F, 2635 Laurel Street
Vancouver, British Columbia V5Z 1M9
Canada

Ship to:
Jaashing He
jaashing.he@vch.ca
Research Project

Business No.: 126415439 RP0001

Item No.	Unit	Quantity	Description	Tax	Unit Price	Amount
11/6	2	2	Research Project (Tim Lim)	G	60.00	120.00
			G - GST - 5%			6.00
			GST			
Shipped By: Tracking Number:					Total Amount	126.00
Comment: Payable upon Receipt. Thank you for your business.						
Sold By:						

Expenses

C) Research Participant Incentives

What is a participant incentive?

- Small Token of Appreciation given to patients who participate in your research study

How do we pay participant incentives?

- VCH does not allow the use of petty cash for participant fees
- Teams may pay out of pocket for participant fees, then submit an expense claim form - providing all necessary information is recorded on a patient tracking list
- Please contact VCHRI Awards/Finance if you wish to provide incentives to your participants
- Any incentives disbursed before consultation with VCHRI will not be processed

KNOWLEDGE TRANSLATION CHALLENGE

Questions & Answers

<https://www.vchri.ca/award-application-forms-and-resources>

VCHRI Finance Contacts

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Niki Chen, Finance Manager

Niki.Chen@vch.ca 604.875.4111 ext. 21699

Note: We are working under a hybrid model arrangement and not always in the office. It is best to reach us via email.

KNOWLEDGE TRANSLATION CHALLENGE