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**Tri-Agency Expense Eligibility Evaluation Request Form**

**Purpose: This form should be used to request an evaluation of the eligibility of a research expense related to a Tri-Agency (NSERC, SSHRC or CIHR) funded grant. Prior to requesting an evaluation, refer to the** [**Tri-Agency Projects: Quick Reference Guide to Expense Eligibility**](https://queensuca-my.sharepoint.com/:b:/g/personal/montesan_queensu_ca/EfEhqvcecDZKjQhgdsoRqdYBacbeydU8NeASHvFgBansQw?e=OMcVyc) **to determine if an expense is eligible. If the research expense is not listed, you may then complete and submit this form in order to request an evaluation.**

**THIS SECTION IS TO BE COMPLETED BY THE REQUESTOR AND SUBMITTED TO** [**research.accounting@queensu.ca**](mailto:research.accounting@queensu.ca) **FOR EVALUATION:**

Requestor First and Last Name: Click or tap here to enter text.

Requestor Email Address: Click or tap here to enter text.

Research Project #: Click or tap here to enter text.

Principal Investigator: Click or tap here to enter text.

Estimated Purchase Date: Click or tap to enter a date.

Estimated Amount: $Click or tap here to enter text.

Click or tap here to enter text.

Description of Expense Type (Please also briefly explain how it relates to the research project):

Grant expenditures must meet all of the following **Principles** governing the appropriate use of grant funds as per the Tri-Agency Guide on Financial Administration (TAGFA). **Please check all that apply:**

SelectExpense contributes to the direct costs of the research/activities for which the funds were awarded, with benefits directly attributable to the grant.

Select Expense is not provided by the administering institution to their research personnel.

Select Expense must be effective and economical. *Please note: If expense does not represent the lowest cost, please also attach comparison quotes to demonstrate it is effective and economical. For example: An upgraded economy fare may be more economical than the cost of an economy flight plus seat selection and luggage fees.*

Select Expense must not result in personal gain for members of the research team.

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**THIS SECTION IS TO BE COMPLETED BY RESEARCH ACCOUNTING STAFF:**

Grant expenditures must meet all of the following criteria to be considered an **eligible** expense (check all that apply):

Select Expense meets all four TAGFA principles.

Select Expense is not prohibited by TAGFA directives or program.

Select Expense is not prohibited by Queen’s University Policies and Procedures.

Select Expense is scheduled to be purchased within allowable use of grant funds period.

RESULTS OF EVALUATION:

Expense is considered Choose an item. (**Eligible** or **Ineligible**).

If **eligible**, please submit this completed and approved form with your expense claim in order to avoid processing delays.

If **ineligible**, another source of funds must be used to pay for the expense. The expense has been deemed ineligible for the following reason:

Choose an item.

Click or tap here to enter text.

Additional Comments (if any):

If you have questions regarding this evaluation, please contact Research Accounting at [research.accounting@queensu.ca](mailto:research.accounting@queensu.ca).

Click or tap here to enter text.

**Research Accounting Approval:**

**Date Approved:**

Click or tap to enter a date.