THE UNIVERSITY OF BRITISH COLUMBIA

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FM3050: Financial Management – Research Accounting

University of British Columbia RECORDS SCHEDULE	Schedule Number: FM3050
Primary Title: Research Accounting	**Office of Primary Responsibility (OPR):** UBCV: Research Finance UBCO: Office of Research Services

Series consists of records relating to the administration of Project Grant (PG) on behalf of Principal Investigators conducting research at the university. Records include budget, speed charts, financial and progress reporting and revenue collection. Also included in this series are audits conducted on the Project Grant either internal or external.

Note: Once records are loaded and approved in Workday the record holder should destroy the referent records.

Vital: Yes	PIB: No
Authority BoG Policy LR2: Research Tri-Agency Guide on Financial Administration Budget Transparency and Accountability Act [SBC 2000] Chapter 23 Records Management Office Digitization Standard	Date Approved: 20220729

Secondary No.	Secondary Title	Retention, Destruction & Disposition
01	**Policies and Procedures**	EV+5Y, FR EV=Date superseded or obsolete FR=UA will fully retain records from this series
05	**General**	EV+5Y, D EV=Date superseded or obsolete
10	**Audit**	FY+7Y, D
13	**Compliance Reporting**	FY+7Y, D
15	**Funds Transfer**	EV+7Y, D EV=Date of transfer

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25	**Project Grants Accounts**	EV+7Y, D EV=At end of research term or end or when account is empty
60	**Reports**	CY+5Y, SR SR=UA will selectively retain records from this series

Acronym Key. AY = Academic Year; CY=Calendar Year; D=Destroy; EV=Event; FY=Fiscal Year; FR=Full Retention by University Archives unless otherwise noted; OPR=Office or Department responsible for *source of truth* records; SO=When superseded or obsolete; SR=Selective Retention by University Archives; Y=Year