

CFI – Infrastructure Operating Fund (IOF) Expense Claim Process

The Office of Research and Innovation has recently revised the process to access the IOF funds in efforts to streamline the process for Researchers. All requests to access the CFI-IOF are to be submitted to researchfinance@trentu.ca. Research Finance and the ORI will review all requests, and approvals will be sent out by researchfinance@trentu.ca. Detailed steps are provided below for payroll requests, or when submitting expenses via Requisition Creation or Chrome River. Please see below:

Step	Salary expenses	Non-salary (Requisition Creation)	Non-salary (Chrome River reimbursement)
1	PI would like to fund a technician or professional from the IOF*	PI would like to fund the purchase of a part or repair from the IOF*	PI would like to fund the purchase of a part or repair from the IOF*
2	PI completes the CFI-IOF Employment Form and submits to Research Finance.	PI obtains quote(s), completes CFI-IOF Expense Request Form and submits to Research Finance.	PI incurs cost out of pocket. PI completes CFI-IOF Expense Request Form and attaches to Chrome River Expense form. PI charges expense to their own research account.
3	Research Finance and ORI will review for approval.	Research Finance and ORI will review for pre-approval.	Research Finance and ORI will review for approval.
4	Research Finance notifies PI of approval or denial.	Research Finance will notify PI of pre-approval or denial.	Research Finance notifies PI of approval or denial.
5	If approved, PI to hire the individual using the Research Personnel Employment Form and charge wages to their own research account.	If pre-approved, PI will create a purchase requisition, charge expense to their own research account, submit invoice and Expense Request Form to purchasedocs@trentu.ca for payment.	If approved, Research Finance updates account allocation in Chrome River report to CFI-IOF.
6	Each month, Research Finance will transfer the approved wages to the CFI-IOF account.	Once payment is processed, Research Finance will transfer the expense to the CFI-IOF account.	

*The CFI-IOF Employment Form and the CFI-IOF Expense Form are attached to this email. Please review page 2 of each form to ensure your expenses are eligible. If you have questions regarding eligibility, please contact researchfinance@trentu.ca.