



**Ray McNichol**

Director

**Financial Services**

305-2075 Wesbrook Mall  
Vancouver, BC V6T 1Z1

Tel: (604) 827-5018

Fax: (604) 822-2417

Email:

[mcnichol@finance.ubc.ca](mailto:mcnichol@finance.ubc.ca)

# MEMORANDUM

---

**TO:** Head of Department/Unit; Administrators/Finance Managers;  
Director of Finance/Administration

**DATE:** June 8, 2009

**CC:** Dean of Faculty; Evelyn Miguel, Manager of Research and  
Trust Accounting; RTA Analysts

**RE: PG Email Notification**

---

Finance is pleased to add the service of email reminders for research (R) and specific purpose (S) project/grants (PGs). Effective June 8, 2009, the PG managers of research and specific purpose PGs will receive an email in the following two scenarios:

1. For grants expiring/expired within 90 days; and
2. For grants with a PG balance approaching its limit or is overspent.

#### Expiring/expired within 90 days

Ninety days prior to the PG end date an email will be sent to the PG manager to remind them to initiate a request for an extension from their sponsors, if required.

#### PG Balance

PG managers will receive an email notification when the PG balance is 10% or less of the total budget balance at the beginning of the project year. This serves as a reminder for researchers to take action to avoid a deficit or to clear the deficit in their PG.

We hope that the implementation of this service will help highlight PGs that may require extra attention.

**Please distribute this memorandum to all faculty members involved in the research process and to those who need to be aware of these controls.**

Do not hesitate to contact me if you have any questions.

Regards,

Ray McNichol  
Director