INSTRUCTIONS FOR REQUEST FOR PARTICIPANT PAYMENT ADVANCE

August 2012

The Participant Payment Advance form is used to request an advance for funds needed in order to pay participant for involvement in research. The advance amount goes into a holding account and is not charged to the department code until the claimant completes a Travel and Expense Form after the research is completed.

Date Required	Input the date that you need to receive the cheque by. Please leave sufficient time for Accounts Payable to process the cheque. This is usually 7 business days. If circumstances make it necessary for you to have the cheque in a shorter length of time, please note this on the form and have it hand-delivered to Accounts Payable. Participant payment advances are issued only within 30 days of the start of the research.
Payee Information	Input name and department of the payee. If the cheque is to be mailed through Canada Post, please include the full mailing address including the Postal Code.
Delivery Information	Select the delivery method required. If picking it up, include your name and extension.
Advance Amount Required and Fund Type	Advance request are processed for amounts between $1,000 and $5,000 and are available in Canadian currency only.
Expected Completion Date of Research	The expected completion date of research should be the estimated end date of the payment to participants.
Purpose of Advance	Please give a brief description for the purpose of the advance and provide an estimate of the nature of expenses to be incurred.
Expenses will be Eventually Charged to	This information is needed to help track down advances that have not been cleared by the Travel and Expense Form. All advances for travel prior to April 30th should clear before the first Friday in May to be included in the correct fiscal year.
Signature	Correct signatures are vital to prompt processing of a payment request. Forms with incomplete or incorrect signatures will be returned.
Payment Requestor	This signature is required if the person filling in the form is not the person to whom the payment will be made.
Claimant	The claimant's signature acknowledges that he/she is aware of the information contained in the advance section of the Travel & Related Expense Policy. Some of the relevant information in the policy are:

	• Outstanding advances are considered the responsibility of the recipient. • Further advances will be withheld until older advances are cleared. • Invoices older than 90 days from the date of the expected completion of the research will be considered personal expenses and invoiced accordingly. • An Travel and Expense Form must be submitted with original receipts when the research has been completed.
Authorized Approver	The signature of the authorized approver is required since the cheque will be paid to the claimant. The authorized approver is authorizing the advance but is not authorizing individual expenditures as being eligible under University policy. Once the participant payments are complete, the claimant must fill out an Travel and Expense Form and have the authorized approver approve the actual expenditures.