# File Organization

## Row 1 Definition

* Send Report To: Names listed will be the one receiving monthly financial report (need to build contact database)
* Depart ID: this is the account number, it is unique and corresponds to Specific FAS # and Ethics No under column K and L
* Account Name: this is unique and an name for Department ID, this is unique as well
* PI/Account Holder/Signing up to $5,000: this is the primary account holder/PI for the
* Level Designate: Alternate signing authority
* Level 2/Signing up to $20,000: this is typically the department head (ie: HLI accounts are all Dr. Don Sin)
* Dept: this is the department PI of the account holder belongs to
* Sponsor: this is the company funding the study/account (probably need to build contact database)
* Country/Province: sponsor location
* Type: This is the type of study/account, either grant, Clinical Trial or general operating
* FSA: this is account identification in RiSE (UBC grant/funding tracking system), unique
* Ethics: this is the unique # for each study, Clinical Trials must have this # whereas operating account typically do not have this number
* Overhead: % of OH applicable to the study
* Admin Email: contact info for send report to names
* PI Email: contact info for account holder
* Other Notes: for finance internal use

## How Finance Uses this template

* Regular update as new account is opened
* Regular closing of account as study finishes (option to close account)
* Regular update as department/admin contact changes (should be initiated at department level)
* Should restrict viewing access by PI/department/contact