

# Research Workday Town Hall

## October 19, 2023

# Research Workday Town Hall Agenda

October 19, 2023

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- Welcome
- Ad Hoc Approver for Payroll Costing Allocations
- Finance Reporting Review
- Security Access for Effort Trend Report
- Effort Certification
- Q&A

# **Ad Hoc Approver for Payroll Costing Allocation**

# Ad Hoc Approver for Payroll Costing Allocation

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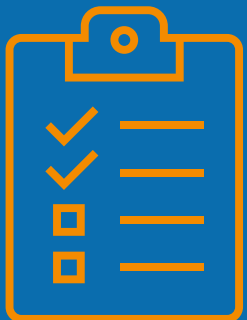
A new option is added to PCAs to allow for the addition of Ad Hoc Approver(s) for grants in direct response to Voice of the Customer Feedback!

This option should be used:

- If your cost center manager is not the same person as the grant manager and the grant manager has direct knowledge of the need for change.
- If the employee's effort that is being adjusted is on a cost center outside of the department that is initiating the PCA.

*Note: Ad-hoc approvers can only be added by one of the required approvers. Once an approver adds an ad-hoc approver, no subsequent approvers will have the option to add ad-hoc approvers.*

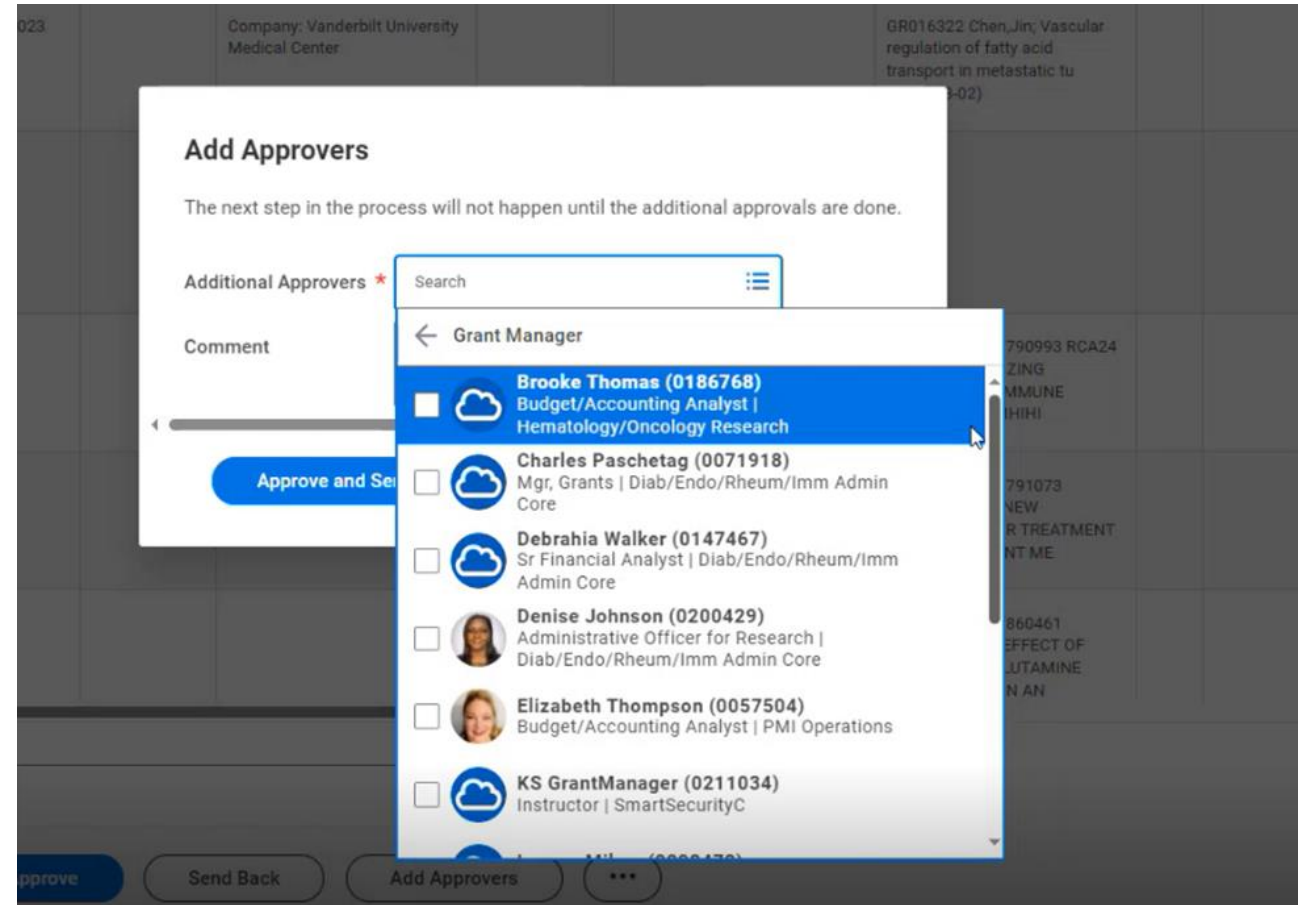
***Ad hoc approvers should not be added unless it is necessary!***



# Ad Hoc Approver for Payroll Costing Allocation

If appropriate, an approver can add an ad-hoc approver as part of their approval.

- Click **Add Approvers**
- From the Additional Approvers filed, search for the individual(s) to add.
- Select all approvers necessary to add.
- Enter a comment explaining the reason for the ad-hoc approval.
- Click **Approve and Send to Approvers**



# Finance Reporting Review

# Finance Reporting Review

**Department Finance Reports**

Clinical Enterprise    Academic Enterprise

**CR Academic Enterprise Reports**

Report Task	Brief Description
<a href="#">CR Fin - Academic Enterprise Clinical Practice Details</a>	P&L format for Clinical areas of the Academic Enterprise. Organization prompt can be run by cost center, or cost center hierarchy level. If run at the department level, returns the budgeted margin for that department (i.e. no grant or gift activity).
<a href="#">CR Fin - Academic Enterprise Cores</a>	Filtered results based on CARTS values to return CORES data. P&L format for Clinical areas of the Academic Enterprise. Organization prompt can be run by cost center, or cost center hierarchy level. If run at the department level, returns only CORES activity.

**CR Labor Reports**

Report Task	Brief Description
	selected during the runtime
<a href="#">CR - Labor Distribution by Earnings_Detailed</a>	Provides detailed information about each employee's earnings by categories such as Regular, PTO, Sick, Orientation, Other, Overtime, Shift and Premium
<a href="#">CR - Labor Distribution by Hours</a>	Provides summary of hours by each cost center, divided into categories such as Regular, PTO, Sick, Orientation, Other, Overtime, Shift and Premium. It also drills down to Ledger Account, Job Category and employee level

**CR Research Reports**

Report Task	Brief Description
<a href="#">CR Effort Actuals and Obligations</a>	
<a href="#">CR Fin - Budget vs Actual for Grant or Award</a>	
<a href="#">CR Fin - Department Salary Trend for Grant or Award</a>	Combines actual and obligation journals from payroll to trend salary and fringe by person for the prompted grant or award. Payroll obligations build for the current fiscal year, or for research only through the award line end date.

[View More ...](#)

**CR FDM Reports**

Report Task	Brief Description
<a href="#">CR FIN Cost Center Lookup</a>	Provides a list of valid cost centers as well as rollup levels for the cost center hierarchy

[View More ...](#)

**CR VMG Reports**

Report Task	Brief Description
<a href="#">CR FIN - Allocation Transactions</a>	This report offers Journal Level detail for transactions with the Professional Service Revenue (4020) and Allocations (6495) Ledger Accounts.
<a href="#">CR FIN - Cost Center Professional Revenue Trend</a>	This report shows FYTD trends for transactions posted with the Professional Service Revenue (4020) and Allocations (6495) Ledger Accounts.
<a href="#">CR FIN - Professional Revenue Trend - Cost Center Level</a>	This report will deliver the FYTD trend for Professional Service Revenue (4020) Ledger Account by Cost Center.
<a href="#">CR Fin - Provider Collections by Bill Area Trend</a>	This report delivers FYTD Trending for Provider and Bill Area level collection amounts for the Professional Services Ledger Account (Account #4020) and

**CR Gifts Reports**

Report Task	Brief Description
<a href="#">CR Fin Endowment Gifts</a>	
<a href="#">CR Fin Spendable Gifts</a>	

[View More ...](#)

# Coming Soon – WalkMe for Report Prompts

Enter or select the Fiscal Period (e.g., FY23 - Jun). Note that some reports (e.g., FTE reports) will only display data for closed fiscal periods. Also note that data prior to FY23-Apr will be limited.

### CR Fin - Academic Enterprise Clinical Practice Details

? Organization \*

? Period \*

? Worktags

Manage Filters   
0 Saved Filters





workday



*Demo*



# **Security Access for Effort Trend Report**

# Security Access for Effort Trend Report

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**Role:**

Manager

HCM Business  
Manager

HCM Business  
Assistant with  
Compensation

**Supervisory Organization**

**Role:**

Cost Center  
Manager

Cost Center  
Financial Analyst  
with Payroll  
Details

**Cost Center**

**Role:**

Grant Manager

Grant Financial  
Analyst

**Grant**

# Effort Certification

# As Discussed in the September 21 Town Hall:

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## Prepare for Effort Certification – Actions Needed Now

### Effort Reporting and Certification in Workday

Review Payroll Costing Allocations now:

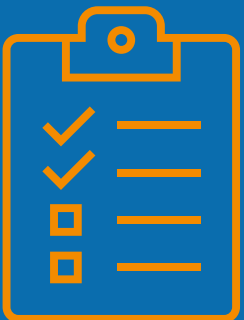
- Is the plan as expected?
- Are any grants expired?

On an ongoing basis, proactively communicate and update the individual's Payroll Costing Allocation when changes occur:

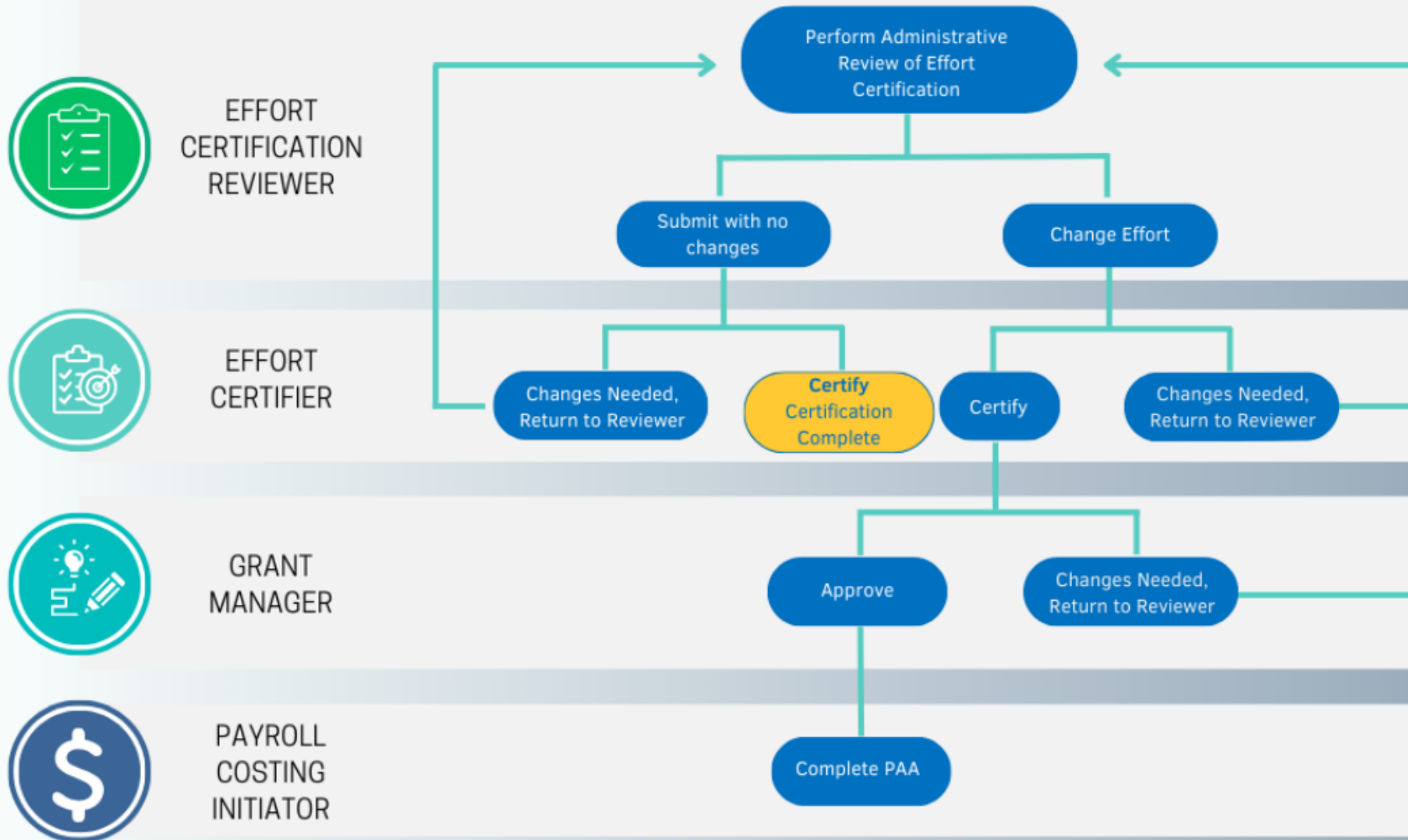
- New awards begin
- Existing awards close
- Work increases, decreases across various awards

First Certification will be generated after September close, likely towards the end of the week of October 16 for the period of:

- March 26, 2023 – September 30, 2023



# EFFORT CERTIFICATION ROLES AND RESPONSIBILITIES



## Items to Note:

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Effort Certification Reviewer Role Assignments are being setup now.

Effort Certification will not be generated until after the first Effort Certification Reviewer Role meeting. Invitations will be sent out today. Meetings are scheduled for next week and ongoing daily office hours will follow indefinitely.

PAA's in workflow will prevent an individual's Effort Certification from being created.

Please notify your Payroll Costing Initiators: Once the certification is generated, PAA's cannot be initiated for the individual until the certification is complete. At this time, any changes that are needed for periods prior to September 30 should be completed as part of the effort certification administrative review.

# Research Admin Newsletter

[Research Administration at VUMC – VUMC – Office of Sponsored Programs \(wordpress.com\)](#)

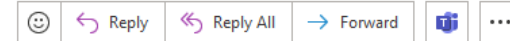
Research Admin at VUMC | Issue 8 | October 16, 2023



Christen <christen.m.parzych@vumc.org>

To Garcia-Taylor, Tesha

[If there are problems with how this message is displayed, click here to view it in a web browser.](#)



Mon 10/16/2023 7:18 PM



OCTOBER 16, 2023

ISSUE 8

## In This Issue:

- Shared Drive in Workday: 'Sponsored Research – Resources in Drive'
- Exporting PAAs to Excel
- Voluntary Committed Cost Share
- Salary Over the Cap for Part-Time Faculty
- Effort Certification Reviewer Role and the Timing of the Upcoming Effort Certification
- NIH Career Development (K) Award Salary Allocation for PIs in Workday
- Effort Trend Reports
- Reviewing Payroll Expenses Using the CR – Center Account Summary – Salaries and Wages





Questions?