Research Workday Town Hall
February 15, 2024

Research Workday Town Hall Agenda

February 15, 2024

- Updates on Effort Reporting
- Principal Investigator Landing Page
- CR Find Purchase Orders by Organization with Balance
- Grant Budget Detail in Workday
- Expense Report Reminders
- Q&A

Updates on Effort Reporting

Communication from Launch of Effort Certification Process

Effort Reporting and Certification in Workday

First two effort certification periods will be 6 months each:

- March 26, 2023 – September 30, 2023
- October 1, 2023 – March 31, 2024

Effort certification will occur once a quarter NEXT YEAR – FY25

Take a deep breath... as we get started with Effort in Workday, we are going to:

- Extend our initial review period
- Allow for adequate time to learn the system and the review process
- Provide daily support and assist with changes as needed
- Recognize the importance of reviewing and ensuring effort is correct prior to certification
- Evaluate our processes and timeline as we go, document challenges and obstacles

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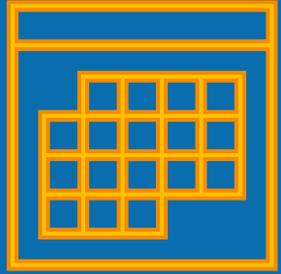
GOAL:

Successful, Compliant, and Not Traumatic!

Thank you to our Effort Certification Reviewers!

Amanda McGeshick
Amber Vongsamphanh
Amy Shelton
Angela Reese
Angela Thompson
Ann Neubecker
April Cribbs
Betty Cortner
Brennan Johnson
Brittiany Adams
Brooke Hooper
Cacy Roberts
Candice Stevens
Carla Parrish
Chelsea Custer
Chineme Chokuba
Christy Hinkle
Christy Kampe
Christy Nichols
Cindy Khoury
Colleen Angielczyk
Curtis Perez
Dana Walker
David Locke
Dawna Wagoner
Deandra Harris
Debrahia Walker
Denise Johnson
Destinee Trail
Donte' Carter
Doris Head

Douglas McCoy
Emily Robertson
Esther Rainey
Ethelle Fitch
Glenna King
Gregory Crutchfield
Hanna Hoover
Heather Misch
Heather Selke
James Mizell
Jamie McAdams
Janey Wang
Jeannine Courtney
Jennifer Martellotti
Karen Hagan
Karen Jackson
Karen Thompson
Katisha Moton
Keith Rawlings
Kelley Johnston
Kellie Cartelli
Kevin Cheatham
Kristi Daniel
Kristie Lee
Laura Elgin
Lauren Milam
Leslie Dysinger
Linda Stewart
Lisa Graham
Lisa Lawrence
Louis Rhodes

Maggie Ragheb
Marche Hicks
Maria Peng
Marina Holmes
Mentoria Jennings
Mustafa Nateqi
Myra Harris
Myressa Thomas
Nishq Mody
Orrin Sumatra
Patricia Herring
Richard Steinhart
Rob Harper
Sandra Hewston
Sandra Holtzclaw
Shanna Lafontaine
Shanti Venkatraman
Shelly McGehee
Shermeicka Bacon
Stephanie Haraway
Tasha Pritchard
Thayer Hamm
Theresa Sberna
Tiffany Ladd
Timothy Stafford
Traci Tidwell
Tracy Hendy
Tracy Martin
Tracy Perry
William Pojedinec

THANK YOU to our
Effort Certification Reviewer
Office Hour Extraordinaires!

Doug Smith
Robert Dow

Compliance – Federal Regulations and Institutional Practices

Effort Reporting and Certification in Workday

In accepting a federally-sponsored grant or contract, VUMC agrees to abide by certain federal rules and regulations regarding the use of the funds.

Please prioritize the any outstanding certifications in your work areas to target completion of our first certification by the **Friday, February 16th!**

Need assistance?

- Join TWICE daily office hours (links are available directly in the Effort Certification Reviewers teams channel under Posts)

- Contact vumc.effort@vumc.org to schedule a meeting with a team member who can assist with your questions

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Institutional practice and expectation:

Regular effort conversations on a monthly, no less than quarterly, basis for all individuals with federal funding sources.

Effort Certification Status Update
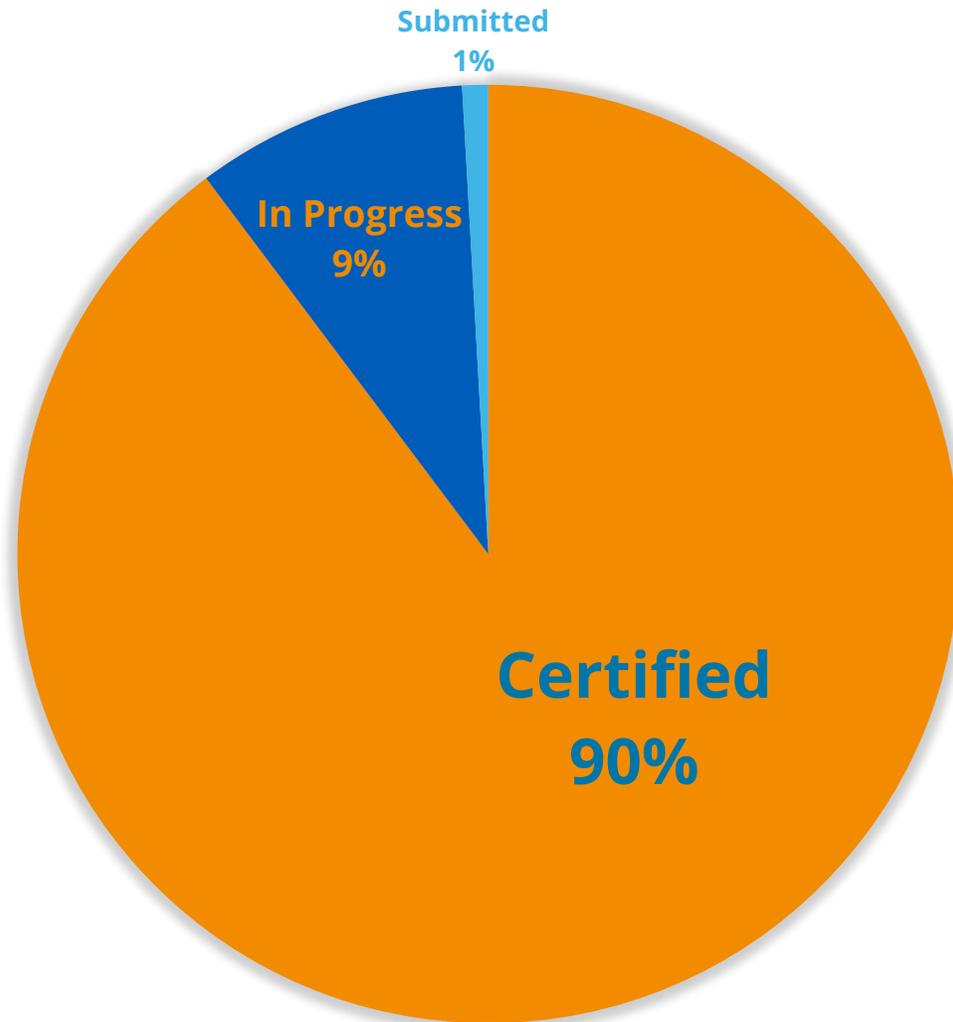
Status	Count of Employee
Certified	3030
In Progress	315
Submitted	30
Grand Total	**3375**

Effort Certification Process Definitions

(0) PAA Outstanding – Payroll Accounting Adjustment in progress preventing the effort certification process from being initiated.

(1) In Progress - Effort Certification has been initiated and awaiting completion of Administrative Review.

(2) Submitted - Administrative Review completed, Certification completed, Changes awaiting Grant Manager approval.

(3) Certified - Effort Certification process has been finalized.

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(0) Preventing the Effort Certification from being initiated.

EFFORT CERTIFICATION ROLES* AND RESPONSIBILITIES

EFFORT CERTIFICATION REVIEWER

EFFORT CERTIFIER

GRANT MANAGER*

PAYROLL COSTING INITIATOR

(1) Perform Administrative Review of Effort Certification

Submit with no changes

Change Effort

Changes Needed, Return to Reviewer

Certify Certification Complete

(3) Certify

Changes Needed, Return to Reviewer

(2) Approve

Changes Needed, Return to Reviewer

Complete PAA

*These are Workday Roles, not job titles/descriptions.

EFFORT CERTIFICATION ROLES*
AND RESPONSIBILITIES

EFFORT CERTIFICATION REVIEWER

Perform Administrative Review of Effort Certification

Submit with no changes

Change Effort

EFFORT CERTIFIER

Changes Needed, Return to Reviewer

Certify Certification Complete

Certify

Changes Needed, Return to Reviewer

GRANT MANAGER*

Approve

Changes Needed, Return to Reviewer

PAYROLL COSTING INITIATOR

Complete PAA

*These are Workday Roles, not job titles/descriptions.

PAYROLL COSTING INITIATOR

Complete PAA

Payroll Costing Initiator

-If corrections are made as part of the effort certification process, **ALL Payroll Costing Initiators** (security role on cost center) receive an inbox item AFTER the certifier certifies and the grant manager(s) approve.

-This inbox item is the PAA. The Payroll Costing Initiator OPENS the pre-filled PAA and **reviews** it to ensure the changes are what they were expecting and compares it to the supporting documentation to make sure the dollars agree. Then it goes through normal PAA steps, complete the questionnaire, grant manager, cost center manager approvals, Finance approvals. **DO NOT CANCEL THE PAA**

-If you change effort to this period after certification is complete, the person's effort will need to go through the review process and be **recertified**.

Prepare for the next Effort Certification – Ongoing

Effort Reporting and Certification in Workday

- Review Payroll Costing Allocations on at least a monthly basis:
    - Is the plan as expected?
    - Are any grants expired or expiring soon?

- 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

- Peek into the Future with...

Institutional practice and expectation:

Regular effort conversations on a monthly, no less than quarterly, basis for all individuals with federal funding sources.

MW

Future Salary Effort Trend – Coming Soon!!

- Future Salary Effort Trend – Provides detail on future salary obligations on grants, cost centers, programs, gifts, and assignees

- Obligations through Award End Date for grants, and fiscal year for all other worktags

- Built off a PRISM data source

  - Updates nightly with Actuals from Workday (i.e. obligations relieved by payroll runs)

  - Future effort still calculating and updating bi-weekly with the bi-weekly payroll calculation (week of February 12th, February 26th etc)

  - Same *expanded* security as the Effort Trend and Salary Effort Trend (next slide)

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Workday Labor/Effort Reporting Security

Person or Supervisory Org

Gift

Grant

Program
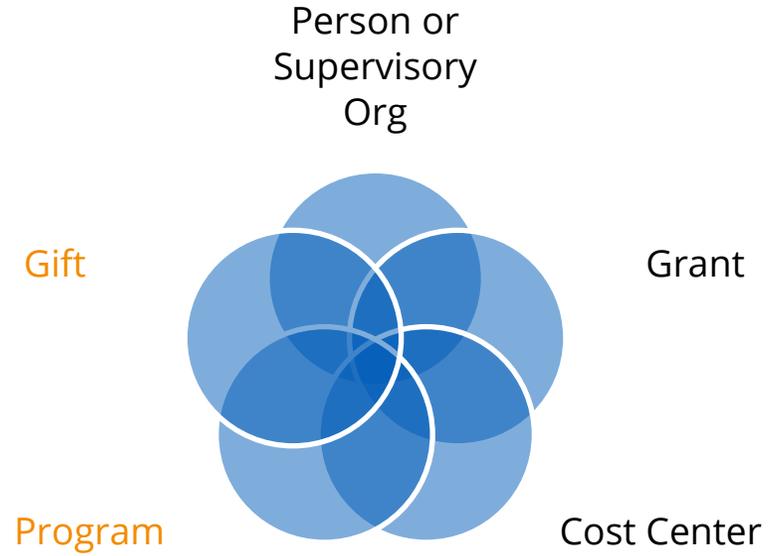
Cost Center

Supervisory Organization	Cost Center	Grant	Program	Gift
•Manager •HCM Business Manager •HCM Business Assistant with Compensation	•Cost Center Manager •Cost Center Financial Analyst with Payroll Details	•Grant Manager •Grant Financial Analyst	•Program Manager	•Gift Manager

Future Salary Effort Trend ⋯

Period FY24 - Feb   **Grant** GR0███████████████████████████████████████ (2023-09-01)

Job Profile	Worker	Supervisory Organization	Grant	Cost Center	Gift	Fund	Program	Assignee	SOC Type	Feb - FY24	
										Amount	Effort
4646 - Clinical Trials Associate 2		Emergency Medicine Research Department (Karen Miller (0065020)) (S104791AA)		CC01285 Emergency Medicine - CD Acad Grants Gifts	(Blank)	FD004 Sponsored Program Fund	(Blank)	(Blank)	(Blank)	431.52	20.00%
2120 - Professor		Emergency Medicine Research Department (Christy Kampe (0125192)) (S104791AC)		CC01285 Emergency Medicine - CD Acad Grants Gifts	(Blank)	FD004 Sponsored Program Fund	(Blank)	(Blank)	(Blank)	1944.25	8.24%
2120 - Professor		Emergency Medicine Research Department (Christy Kampe (0125192)) (S104791AC)		CC01288 Emergency Medicine - CD Clin Research Admin	(Blank)	FD001 General Fund	PG000 ████████	(Blank)	NIH Level II Salary Cap	1629.23	6.91%
2120 - Professor		Emergency Medicine Research Department (Christy Kampe (0125192)) (S104791AC)		CC01288 Emergency Medicine - CD Clin Research Admin	(Blank)	FD001 General Fund	(Blank)	(Blank)	NIH Level II Salary Cap	0	0.00%
4646 - Clinical Trials Associate 2		Emergency Medicine Research Department (Karen Miller (0065020)) (S104791AA)		CC01285 Emergency Medicine - CD Acad Grants Gifts	(Blank)	FD004 Sponsored Program Fund	(Blank)	(Blank)	(Blank)	190.4	36.09%
6841 - Nurse Resident Inpatient		Emergency Services 100 Department (Breehan Pfeiffer (0153778)) (S201909AA)		CC01285 Emergency Medicine - CD Acad Grants Gifts	(Blank)	FD004 Sponsored Program Fund	(Blank)	(Blank)	(Blank)	0	0.00%
3549 - Lead Project Manager		Emergency Medicine Research Department (Christy Kampe (0125192)) (S104791AC)		CC01285 Emergency Medicine - CD Acad Grants Gifts	(Blank)	FD004 Sponsored Program Fund	(Blank)	(Blank)	(Blank)	881.88	10.00%
2050 - Assoc Professor		Department of Biostatistics Department (Janey Wang (0026636))		CC01285 Emergency Medicine - CD Acad	(Blank)	FD004 Sponsored Program Fund	(Blank)	(Blank)	(Blank)	799.23	6.82%

...gram	Assignee	SOC Type	Feb - FY24		Mar - FY24		Apr - FY24		May - FY24		Jun - FY24		Jul - FY25		Aug - FY25	
			Amount	Effort %	Amount	Effort %	Amount	Effort %	Amount	Effort %	Amount	Effort %	Amount	Effort %	Amount	Effort %
...ank)	(Blank)	(Blank)	431.52	20.00%	431.52	20.00%	431.52	20.00%	431.52	20.00%	647.28	30.00%	431.52	40.00%	539.4	140.00%
...ank)	(Blank)	(Blank)	1944.25	8.24%	1944.25	8.24%	1944.25	8.24%	1944.25	8.24%	1944.25	8.24%	1944.25	36.06%	1944.25	36.06%
...000	(Blank)	NIH Level II Salary Cap	1629.23	6.91%	1629.23	6.91%	1629.23	6.91%	1629.23	6.91%	1629.23	6.91%	1629.23	30.22%	1629.23	30.22%
...ank)	(Blank)	NIH Level II Salary Cap	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
...ank)	(Blank)	(Blank)	190.4	36.09%	190.4	23.78%	190.4	21.28%	190.4	21.28%	285.6	31.92%	190.4	167.02%	238	267.02%
...ank)	(Blank)	(Blank)	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
...ank)	(Blank)	(Blank)	881.88	10.00%	881.88	10.00%	881.88	10.00%	881.88	10.00%	881.88	10.00%	881.88	100.00%	881.88	100.00%
...ank)	(Blank)	(Blank)	799.23	6.82%	799.23	6.82%	799.23	6.82%	799.23	6.82%	799.23	6.82%	799.23	1,500.62%	799.23	(299.98%)

Future Salary Effort Trend ...

29 items

Job Profile	Worker	Supervisory Organization	Grant	Cost Center	Gift	Fund	Program	Assignee	SOC Type	Feb - FY24	
										Amount	Effort
2050 - Assoc Professor		Department of Biostatistics Department (Janey Wang (0026636)) (S104268AE)		CC01285 Emergency Medicine - CD Acad Grants Gifts	(Blank)	FD004 Sponsored Program Fund	(Blank)	(Blank)	(Blank)	799.23	6.82%
2120 - Professor		Cardiovascular Medicine Department (Trina Taglialavore (0155844)) (S104333AU)		CC01140 Medicine - Cardiology Div - CD Clin VMG	(Blank)	FD001 General Fund	PG00(	(Blank)	NIH Level II Salary Cap	462.07	1.72%
2120 - Professor		Cardiovascular Medicine Department (Trina Taglialavore (0155844)) (S104333AU)		CC01285 Emergency Medicine - CD Acad Grants Gifts	(Blank)	FD004 Sponsored Program Fund	(Blank)	(Blank)	(Blank)	883.75	3.28%
4646 - Clinical Trials Associate 2		Emergency Medicine Research Department (Karen Miller (0065020)) (S104791AA)		CC01285 Emergency Medicine - CD Acad Grants Gifts	(Blank)	FD004 Sponsored Program Fund	(Blank)	(Blank)	(Blank)	230.72	11.56%
3403 - Clin/Tran Research Coord III		Emergency Medicine Research Department (Karen Miller (0065020)) (S104791AA)		CC01285 Emergency Medicine - CD Acad Grants Gifts	(Blank)	FD004 Sponsored Program Fund	(Blank)	(Blank)	(Blank)	653.47	16.27%
2155 - Senior Associate In ...		Emergency Medicine Research Department (Christy Kampe (0125192)) (S104791AC)		CC01285 Emergency Medicine - CD Acad Grants Gifts	(Blank)	FD004 Sponsored Program Fund	(Blank)	(Blank)	(Blank)	587.92	7.49%
2120 - Professor		Cardiovascular Medicine Department (Trina Taglialavore (0155844)) (S104333AU)		CC01285 Emergency Medicine - CD Acad Grants Gifts	(Blank)	FD004 Sponsored Program Fund	(Blank)	(Blank)	(Blank)	850	6.25%
2035 - Asst Professor		Emergency Medicine Research Department		CC01285 Emergency	(Blank)	FD004 Sponsored Program	(Blank)	(Blank)	(Blank)	1241.52	12.64%

	Program	Assignee	SOC Type	Feb - FY24		Mar - FY24		Apr - FY24		May - FY24		Jun - FY24		Jul - FY25		Aug - FY25	
				Amount	Effort %	Amount	Effort %	Amount	Effort %	Amount	Effort %	Amount	Effort %	Amount	Effort %	Amount	Effort %
4 Sponsored am	(Blank)	(Blank)	(Blank)	799.23	6.82%	799.23	6.82%	799.23	6.82%	799.23	6.82%	799.23	6.82%	799.23	1,500.62%	799.23	(299.98%)
I General	PG00	(Blank)	NIH Level II Salary Cap	462.07	1.72%	462.07	1.72%	462.07	1.72%	462.07	1.72%	462.07	1.72%	462.07	17.17%	462.07	34.33%
4 Sponsored am	(Blank)	(Blank)	(Blank)	883.75	3.28%	883.75	3.28%	883.75	3.28%	883.75	3.28%	883.75	3.28%	883.75	32.83%	883.75	65.67%
4 Sponsored am	(Blank)	(Blank)	(Blank)	230.72	11.56%	230.72	11.16%	230.72	11.07%	230.72	11.54%	346.08	16.60%	230.72	(215.55%)	288.4	(115.55%)
4 Sponsored am	(Blank)	(Blank)	(Blank)	653.47	16.27%	653.47	10.00%	653.47	10.00%	653.47	10.00%	653.47	10.00%	653.47	15.38%	653.47	15.38%
4 Sponsored am	(Blank)	(Blank)	(Blank)	587.92	7.49%	587.92	6.80%	587.92	6.38%	587.92	6.38%	587.92	6.38%	587.92	21.45%	587.92	21.45%
4 Sponsored am	(Blank)	(Blank)	(Blank)	850	6.25%	850	5.00%	850	5.00%	850	5.00%	850	5.00%	850	100.00%	850	100.00%
4 Sponsored am	(Blank)	(Blank)	(Blank)	1241.52	12.64%	1241.52	12.64%	1241.52	10.20%	1241.52	10.20%	1241.52	10.20%	1241.52	50.00%	1241.52	50.00%

Principal Investigator Landing Page

Principal Investigator Landing Page – WIP (VUMC5)

Reports Included

- Status Summary by PI – workbook version
- VU Grant – workbook version (**New**)
- CR Fin – Budget vs Actual for Grant or Award (**Updated**)
- CR Fin - Budget vs Actual for VU Grant (**Updated**)
- Effort Trend – DBV (**New**) *working title*

Security

- Principal Investigator (Grant)
- Grant Manager
- Grant Financial Analyst

Next Steps for Sponsored Research Reporting:

Feedback and Design Sessions (through March 1)

Research Town Hall	BPO Executive Steering	BPO Focus Groups

Data Validation

Load up to date grant budgets in Workday	Verify future PCA allocations (payroll obligations)	Process Accounting Adjustments and PAAs as needed

Change MGMT

Develop Principal Investigators resource page

Move to Production
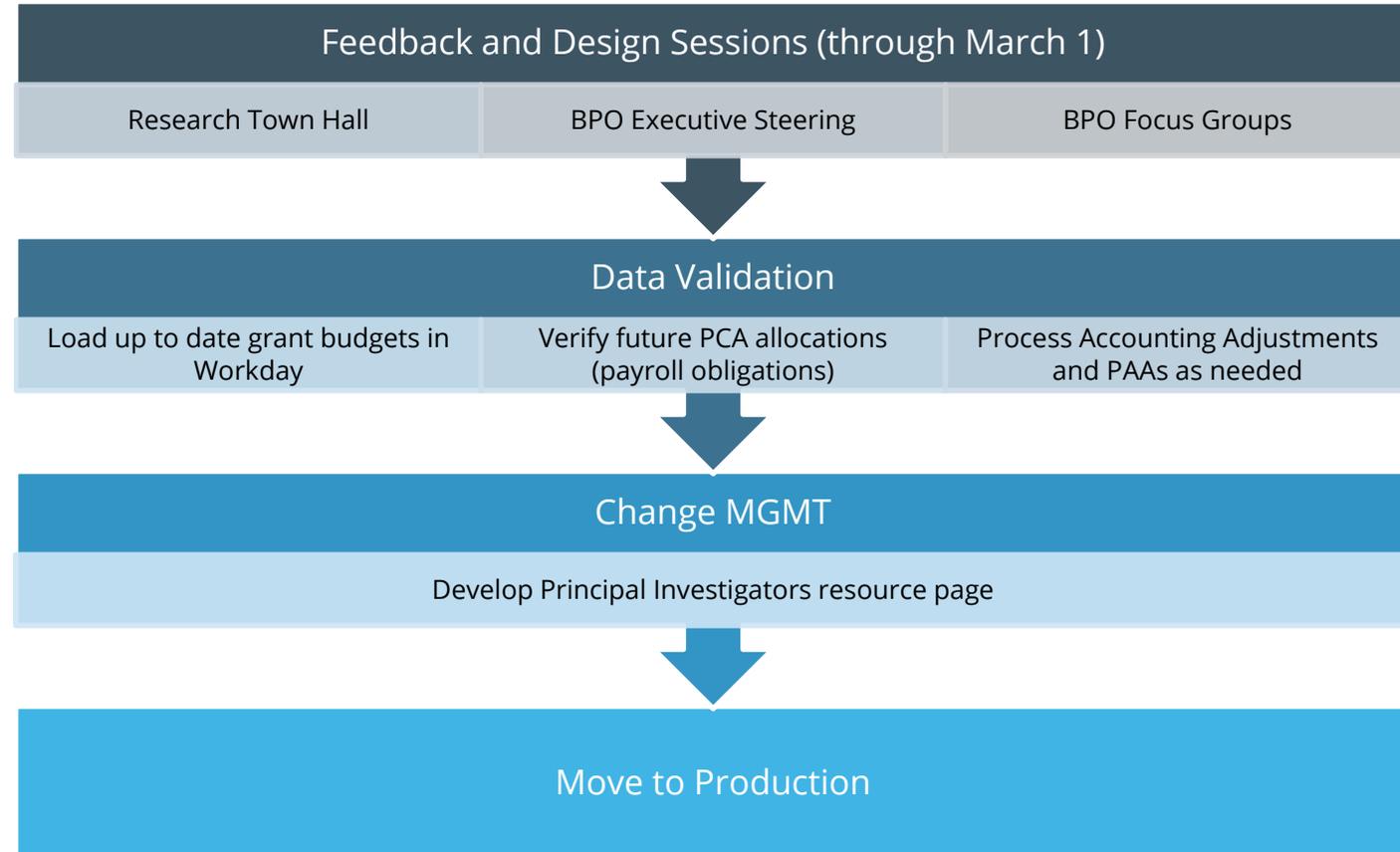
Future Development

Personal Effort

- Expand access to Effort Trend to allow PIs to see 100% of their own effort

Gift Reporting

- Develop and enable PI security to financial reporting with payroll details on gifts
- Add Departmental Gifts reporting to the landing page
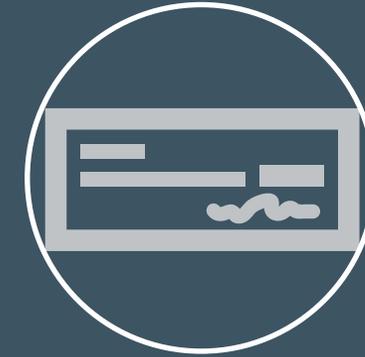
Programmatic and Residual Funds

- Security
- Reporting format

CR Find Purchase Orders by Organization with Balance

CR Find Purchase Orders by Organization with Balance

- Allows for view of the balance that remains on a purchase order

- Ability to filter the data based on Worktags

- Purchase Order balances should be reviewed on a frequent basis to ensure your obligations are properly reflected

CR Find Purchase Orders by Organization with Balance   ····

Companies	
ⓘ Organization	
Purchase Order Type	
Purchase Order	
Document Date On or After	MM/DD/YYYY 📅
Document Date On or Before	MM/DD/YYYY 📅
Due Date On or After	MM/DD/YYYY 📅
Due Date On or Before	MM/DD/YYYY 📅
Status	
Requisitions	
Requisition types	
Requester	
Approver	
Supplier	

OK   Cancel

Memo	Business Document Internal Memo	Obligation Amount	Obligation Amount Liquidated	Obligation Amount Remaining	Obligation Quantity	Obligation Quantity Liquidated	Obligation Quantity Remaining
Department Contact:		783.91	389.13	394.78	0	0	0

Grant Budget Detail in Workday

Objective: Ensure the Accuracy of Workday Budgets on Active Award Records

Catalyst:

- **PI dashboards and administrative reporting functionality requires Workday Grant Tag budget creation and monitoring**

Target:

- **Extremely large population of budgets requiring update**

Outcome:

- **Accurate data for reporting, including status of budget to actual**

Who has access for creating and amending award budgets in Workday?

Creating and amending budgets is a task performed by those with a **Grant Budget Specialist** role in Workday.

GRANT MANAGER

- Approves grant transactions
- Completes award tasks
- Views grant reporting

GRANT FINANCIAL ANALYST

- Views grant records and grant reporting

GRANT BUDGET SPECIALIST

- Creates award budgets
- Amends award budgets

THE GRANT BUDGET SPECIALIST ROLE (EDITOR) SHOULD BE ASSIGNED IN CONJUNCTION WITH THE GRANT MANAGER ROLE (APPROVER)

TO REQUEST A ROLE ASSIGNMENT IN WORKDAY, SUBMIT A WORKDAY APPLICATION DEPARTMENTAL SECURITY REQUEST IN PEGASUS

At what point in the award set-up process can a budget be created in Workday?

Q

Upon award approval by Finance post-award team.

a

VUMC RECEIVES NGA OR CONTRACT

AWARD ENTERED INTO COEUS

OSP's Award Set-Up Team enters relevant award data into Coeus

COEUS TRANSMITS INFO TO WORKDAY

Coeus communicates with Workday to transmit data about the award

OSP VERIFIES & APPROVES WORKDAY DATA

OSP's Award Set-Up Team verifies Worktag data and approves award for notification

FINANCE REVIEWS DATA & SETS UP BILLING SCHEDULE

Finance reviews information, sets up billing schedule, creates financial tasks, and approves

DEPARTMENT RECEIVES WORKDAY NOTIFICATION

Workday notifies department of award receipt and sends an action item to the Grant Budget Specialist

DEPARTMENT USES AWARD LINK TO CREATE BUDGET

Using the award link in the inbox, the Grant Budget Specialist creates budgets for awards in Workday

Full training guide available via the MyWorkday Training Hub

How do I access budget creation functionality in Workday?

Via the award link in the Workday action item

GRANT BUDGET SPECIALIST RECEIVES ACTION ITEM

DEPARTMENT USES AWARD LINK TO CREATE BUDGET

Using the award link in the inbox, the Grant Budget Specialist creates budgets for awards in Workday

SELECT THE BUDGET TAB

SEARCH OR FILTER THE APPROPRIATE GRANT IN THE ORGANIZING DIMENSION FIELD

SELECT OK

SELECT MAINTAIN BUDGET
Note: when budgeting for multiple grants, this task needs to be completed for each individual grant

Overview   Award Lines   ① Budget   Award Tasks

⌄ **Details**

Budget Template   22DNU_Award Budget Structure : AWD000107: Investigating the role o 08/01/2017 (version 0)

Budget   AWD000107: Investigating the role of the JAK/STAT3 Pathway in 08/0

Edit Budget Check Enabled   No

Edit Budget Check Options   ② Maintain Budget   Submit Budget

③ Organizing Dimension   ⭐   ✕ GR005492 4043790291 KHL138291- 05:INVESTIGATING THE ROLE OF THE JAK/STAT3 PATH

Ledger Account/Summary

Worktags

④ OK   Cancel

Full training guide available via the MyWorkday Training Hub

How do I create or update a Workday budget on an existing award record?

Once a budget has been created in Workday, a department can amend it by searching for the award number.

EXISTING AWARD FOR A GRANT OR CONTRACT

DEPARTMENT LOCATES AWARD RECORD IN WORKDAY

Grant Budget Specialist searches award number from Workday home screen

SELECT THE BUDGET TAB

SELECT THE RELATED ACTIONS ICON NEXT TO THE AWARD BUDGET HYPERLINK
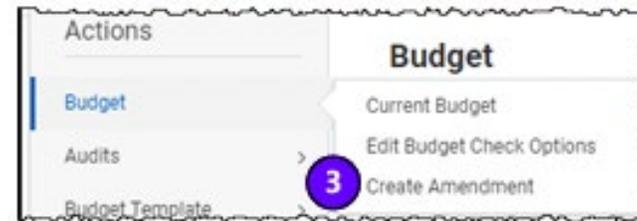
FROM THE RELATED ACTIONS MENU, SELECT THE BUDGET TAB AND THEN CREATE AMENDMENT

Full training guide available via the MyWorkday Training Hub

Q Can a budget in Workday be established prior to receiving an official NGA or fully executed contract?

a Yes! If you know an award or contract is imminent, submit a request for a Grant Worktag via PEER.

DEPT. RECEIVES INDICATION THAT FUNDING IS IMMINENT

DEPARTMENT SUBMITS AWARD INTENT REQUEST VIA PEER

Department administrator submits action (intent) request in PEER, complete with attached sponsor communication indicating imminent funding

OSP SETS UP GRANT WORKTAG

OSP's Award Set-Up Team creates a 'pending' Award Line and Grant Worktag using estimated dates and funding amounts for the pending award

OSP VERIFIES & APPROVES WORKDAY DATA

OSP's Award Set-Up Team verifies Worktag data and approves award for notification

FINANCE REVIEWS DATA & SETS UP BILLING SCHEDULE

Finance reviews information, sets up billing schedule, creates financial tasks, and approves

DEPARTMENT RECEIVES WORKDAY NOTIFICATION

Workday notifies department and prompts further action as needed

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How do I adjust the authorized amount among active AWD Worktags?

Submit a request via PEER.

DEPARTMENT IDENTIFIES NEED FOR REDISTRIBUTION

DEPARTMENT SUBMITS ACTION REQUEST VIA PEER

Department administrator submits action request in PEER that specifies the source Worktag and destination Worktag

Note: authorized carryover operates similarly. Upon approval, funding is moved from one period to another

OSP MODIFIES GRANT WORKTAG

OSP's Award Set-Up Team makes requested changes in Workday, in line with action request

OSP VERIFIES & APPROVES WORKDAY DATA

OSP's Award Set-Up Team verifies Worktag data and approves award for notification

DEPARTMENT RECEIVES WORKDAY NOTIFICATION

Workday notifies department of redistribution and prompts further action as needed

How to Request New Worktags or Change Worktags

Submit an action request in PEER:

For grants: search by the Coeus Institute Proposal (IP) number that identifies the appropriate budget segment/year/supplement.

Note: the Coeus IP number is available (1) in CoeusWeb after successful submission or (2) in Workday by searching by Award ID (for projects already in Workday)

For contracts: search by VUMC contract number for an industry contract under negotiation. For contracts already associated with a Coeus record, search by IP

REMINDER

PEER action requests are appropriate for the following scenarios:
- Requesting new Grant Worktags (intent or child)
- Reallocating funding between existing Worktags
- Requesting responsible PI change on an existing "child" Worktag (Lead PI on AWD award header follows sponsor prior approval process)
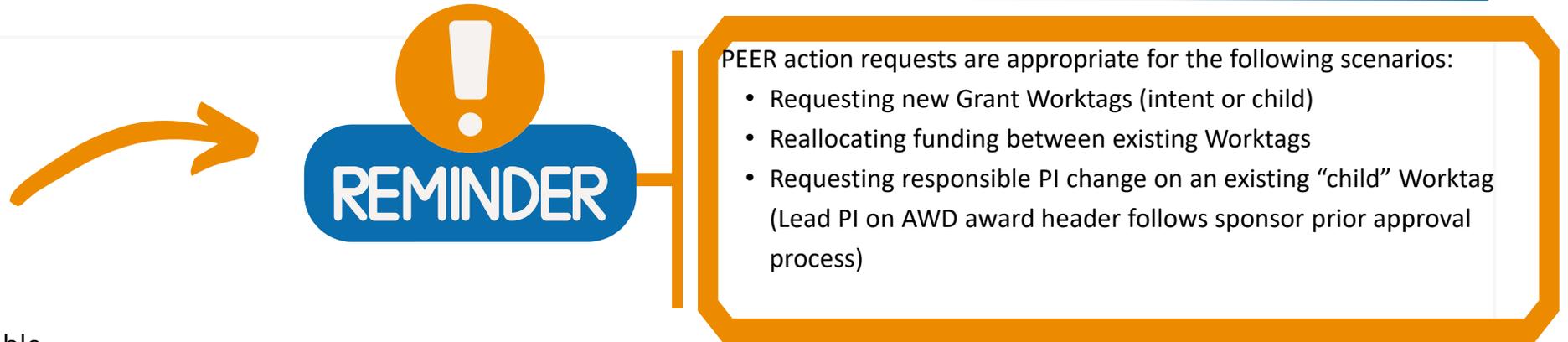
PEER ▾Home ▾Grants ▾Contracts ▾Action Requests 🔔Notifications ❓Help

OSP-Award Management ☰ All Tickets

Home > Submit an Awards Ticket

Awards Management Request Menu:

Requests for Workday actions:

New/Change Workday Grants Worktags
Request OSP create new Grant Worktag(s) in WorkDay, reallocate funding between existing Worktags, or request a PI change on an existing Worktag.

⚠️ **Upon receiving a Worktag, the department should create a Workday budget utilizing the proposed or negotiated budget**

Training & Resources

MyWorkday Training Hub

- **Creating & Amending Award Budgets**
- **Grant & Award Basics: Roles**
- **PEER Action Request: Add Award Line & Grant Worktag**

Learning Exchange

- **WDRG 109: Intro to Award Budgets**
- **WDRG 110: Creating & Amending Research Award Budgets**

Individual Questions

- **Award set-up questions: OSP award set-up representatives**
- **PEER action requests related to Workday: OSP award set-up representatives**
- **General: sponsoredprograms@vumc.org**

MW

Expense Report Update

Expense Report Reminders

Company	Purchasing entity for cost centers – <u>One</u> Company per expense report
Personal Expenses	<u>Not</u> reimbursed
Itemization	Only <u>required</u> for Hotels Can be used to split charges by cost center
International Travel Questionnaire approval	Must be attached for foreign travel
Billable Checkbox	Select for sponsored projects
Multiple card charges on a single expense report?	YES
Disputed Charges	Call U.S. Bank

Next Research Town Hall: March 21, 2024