

Research Workday Town Hall Agenda

November 21st, 2024



- Welcome
- Best Practices for 2025
 - Award Closeout
 - Effort Certification
- PAA Cost Transfer Justification Memo Update
- New Training Curriculum: Post-Award Essentials
- Q&A

Best Practices: Award Closeout

Best Practices for Financial Closeouts

Monitor Expiring Awards report to prepare for closeout

• Monitor CR FIN Expiring Awards

- Participate in monthly meeting with the Sponsored Programs Manager (SPM) to review awards with end date in the next 60-90 days.
- Make necessary pre-award requests via PEER when needed for NCEs, contract amendments, etc.

Proactively initiate changes

- Do costing allocations need to be updated?
- Have final invoices for subawards been received?
- Are POs closed?
- Are all expenses accounted for?
 - Monitor award expenses throughout the life to minimize transactions processed at the end of an award – this includes adding or removing charges
- Is the award overspent?

Ensure expenses are within the budget period and are processed timely

- Evaluate transactions that have posted outside of the award period to determine whether they are eligible for reimbursement.
 - Work with SPM if they are allowable so they can be billed.
 - Submit journals to remove if the charge isn't reimbursable on the award.

Managing Financial Closeout - Reports

Which reports should I run to review activity for financial award closeouts?

- **CR Fin – Research Transaction Summary**
 - Summary by ledger account, Direct costs, F&A, and Total expense

- **Cost Reimbursable Line Status**
 - Summary by Object Class and Grant for each Award
 - Should agree to CR Fin – Research Transaction Summary
 - Review items Pending Award Line Date Review or Awaiting Settlement to identify any journals needed, included potential accruals for closeout

- **CR Fin – Budget vs Actual for Grant or Award**
 - Ensure all Commitments and Obligations are ZERO

- **CR FIN Workflow Aging Report**
 - Confirm all pending transactions have posted

- **Find Supplier Invoices – VUMC**
 - Ensure Subaward invoices are processed; Filter by Spend Category = SC147 Subcontracts and Invoice Status = Draft, Incomplete or In Progress to show outstanding Subaward Invoices Unpaid

- **Effort Trend**
 - Ensure all payroll expenses are appropriate to the budget period and process PCAs for future expenses and PAAs if adjustments are needed

- **Award (AWDXXXXXX)**
 - Ensure “Cost Reimbursable Spend Outside Award Line Dates” is ZERO or known reasons are documented in the closeout

Completing Award Closeout Task

Department Grants Manager should complete assigned Award Closeout Task

- This action alerts Finance Sponsored Program Manager to review closeout and submit to sponsor

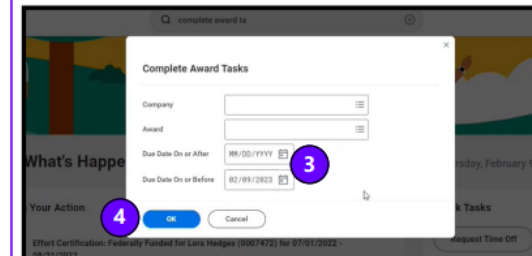
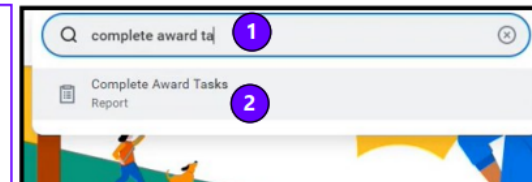


Completing Award Tasks



When a due date for an award task approaches, users must complete the steps detailed in the task and then submit the task.

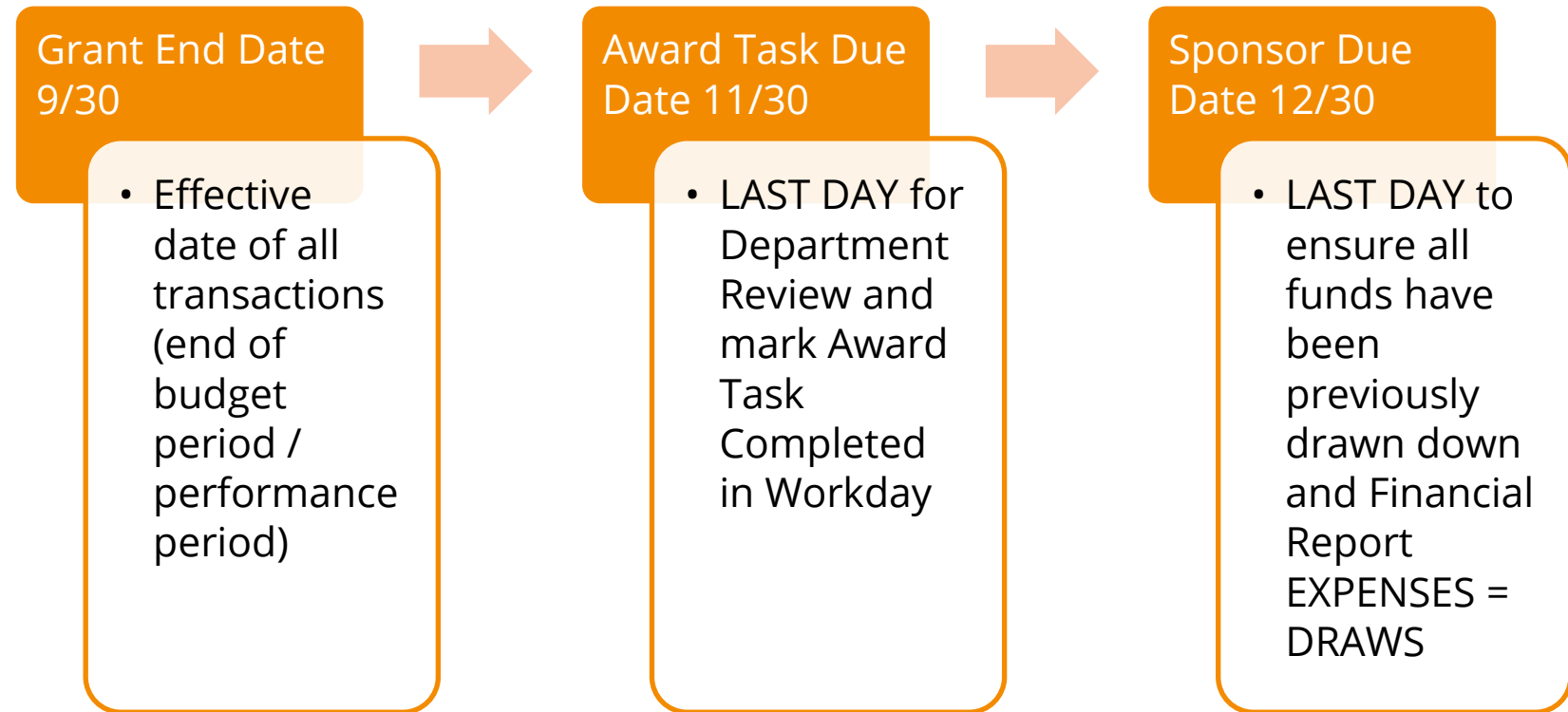
1. Search for **Complete Award Task**
 2. Select **Complete Award Task** from the dropdown
 3. Enter a **date range**
 4. Click **OK**
 5. Click **Complete** on the relevant task
 6. Follow the directions in the **Comments** section of the task
 7. Upload any necessary attachments
 8. Click **Submit**
- Note: Submitting your task will begin the business process and route your submission to central office personnel



Award Task	Organization	Award	Award Group	Award Line	Award Task Type	Start Date	End Date	Due Date	Billing Milestone	Complete
Q	Vanderbilt University Medical Center	AWD88963-22ZDN6L Estrogen signaling and energy metabolism in 01/01/2018 (version 5)	Spend Management	AWD88963 RC156 Federal Grant Revenue (Line 5)	Review Award Terms and Restrictions	02/15/2023	02/28/2023	02/28/2023		Complete
Q	Vanderbilt University Medical Center	AWD88963-22ZDN6L Estrogen signaling and energy metabolism in 01/01/2018 (version 5)	Spend Management	AWD88963 RC156 Federal Grant Revenue (Line 5)	Review Budget to Actuals	02/15/2023	02/28/2023	02/28/2023		Complete

Financial Reporting Close-Out Updates

Departments must complete Award Closeout Task by **award task due date** to reduce/eliminate risk of financial reports being late to sponsors



Complete all journals, adjustments, submit final invoices to be paid, etc. before Award Task Due Date – best practice is that transactions occur before the Grant End Date (during the budget period)

Don't forget to update any PCAs for next budget period – aim to do this before the payroll deadline

Payment Management System states: "Federal grants management policy specifies that within 90 days of the performance period end date, the grant recipient must submit its final financial report and have drawn all funds spent for the grant unless the awarding agency extends the grant award."

Best Practices: Effort Certification

Compliance – Federal Regulations and Institutional Practices

Effort Reporting and Certification in Workday

Although it feels like everything has changed, compliance remains the same...

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

VUMC Effort Reporting and Certification Policy excerpt:

VUMC maintains systems and procedures documenting the distribution of activity to individual sponsored agreements in compliance with federal regulations as defined by 2 CFR Part 200. Any individual who performed work on a federally funded project or the project's principal investigator must certify their effort, unless in their absence, this task is reassigned to a designee who must have suitable means of verification of the distribution of effort.

Acceptance of federal funding by VUMC requires the institution to adhere to the effort reporting requirements prescribed by UG Standards for Documentation of Personnel Expenses in 2 CFR Part 200.430 (i).



Institutional practice and expectation:

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

Best Practices for Effort Reporting and Certification

BOLD STATEMENT: If “effort” is part of your daily responsibilities in whatever role you maintain, everything else will be more seamless and less stressful...

Effort Certification Reviewers and Grant Managers “roles” –

- Check Effort Certification Work Area on a DAILY BASIS
- Run your effort status reports weekly AND follow up
- Get organized and stay organized in a trackable, documented manner for each employee’s effort you are responsible for managing – Update daily as changes occur
- Run pro forma effort certifications to prepare for your monthly review and conversations
- Run pro forma effort certifications when you have questions about how effort is presented or payroll changes
- Monitor, review, and update your PCAs the first week of every month to get ahead of payroll deadlines
- Attend required training and quarterly meetings BEFORE you complete effort certification administrative reviews
- Communicate with those managing your sponsored budgets and proposals and financial reporting REGULAR SCHEDULED WEEKLY CHECK-INS
- Two-way communication with your certifiers at least once a month



Best Practices for Effort Reporting and Certification

BOLD STATEMENT: If “effort” is part of your daily responsibilities in whatever role you maintain, everything else will be more seamless and less stressful...

If you manage Sponsored Award Budgets and/or have Financial Reporting Responsibilities:

- Get organized and stay organized in a trackable, documented manner for each employee’s effort you are responsible for managing – Update daily as changes occur
- COMMUNICATE DAILY with your Payroll Costing Initiators so that PCAs are updated proactively before payroll deadlines
- COMMUNICATE IMMEDIATELY with your Payroll Costing Initiators when PAAs involve sponsored awards and follow up until changes are completed
- Be available and open to communicate with your effort certification reviewers and grant managers (if that is not you) regarding proposals and financial reporting REGULAR SCHEDULED WEEKLY CHECK-INS
- You have valuable information that others need to be aware of...



Best Practices for Effort Reporting and Certification

BOLD STATEMENT: If “effort” is part of your daily responsibilities in whatever role you maintain, everything else will be more seamless and less stressful...

Certifiers (those who are performing work and charging their time to federally sponsored awards) –

- Read the entire Effort Reporting and Certification Policy
- Respond promptly to Effort Certifications that arrive in your Workday Inbox – either review and certify or reach out to the Effort Certification Reviewer with questions
- Be aware of how you are spending your time
- Have regular conversations with your “research administrators” when how you spend your time changes (now and in the future)



Effort Certification Status Report – Create Filters!

Sandbox - vumc

MENU

W

My Tasks

All Items

Saved Searches

Filters

Archive

Bulk Approve

Manage Delegations

Effort Certification Status Report

if you leave both organization prompts blank, workday returns effort certifications in your supervisory organization or in the organizations that you have access to based on the other information you enter.

Worker Organization Assignments

Costed or Supervisory Organizations

Effort Certification Date From * 03/26/2023

Effort Certification Date To * 06/30/2024

Effort Certification Type

Has Supplemental Attachments

Effort Certification Status

Employee

Effort Certification has Costed Changes

Past Due

Past Due More Than (Days)

Filter Name

Manage Filters

104 20

/2024 - 05/31/2024

24 - 05/31/2024

W

Sokolow (0100830) - 08/01/2024 - 08/31/2024

Approve

Send Back

WalkMe Menu:

Effort Certification Status Report – Create Filters!

The screenshot displays the Workday interface with a modal dialog for configuring filters for an Effort Certification Status Report. The background shows a report table with columns for Effort Certification, Employee, and Has Supplemental Attachments. The dialog box contains the following fields and options:

- Instructions:** To search by organization assignments associated with the worker, use the "Worker Organization Assignment" prompt. To search by effort certification line organizations, supervisory organization, or company for the effort certification, use the "Costed or Supervisory Organization" prompt. If you leave both organization prompts blank, Workday returns effort certifications in your supervisory organization or in the organizations that you have access to based on the other information you enter.
- Worker Organization Assignments:** [Text input field]
- Costed or Supervisory Organizations:** [Text input field]
- Effort Certification Date From:** * 10/01/2023 [Calendar icon]
- Effort Certification Date To:** * 03/31/2024 [Calendar icon]
- Effort Certification Type:** [Text input field]
- Has Supplemental Attachments:**
- Effort Certification Status:** [List selection: In Progress, Submitted]
- Employee:** [Text input field]
- Effort Certification has Costed Changes:**
- Past Due:**
- Past Due More Than (Days):** 0 [Text input field]
- Filter Name:** [Text input field]

Buttons at the bottom of the dialog: Cancel, OK.

Background report table (partial view):

Effort Certification	Employee	Has Supplemental Attachments
Federally Funded 10.1.23-3.31.24 for Aaron Brinen (0173171) for 10/01/2023 - 03/31/2024	Aaron Brinen (0173171)	
Federally Funded 10.1.23-3.31.24 for Aaron Lanton (Terminated) (0187434) for 10/01/2023 - 03/31/2024	Aaron Lanton (Terminated) (0187434)	
Federally Funded 10.1.23-3.31.24 for Aaron Moberly (0191517) for 10/01/2023 - 03/31/2024	Aaron Moberly (0191517)	Yes
Federally Funded 10.1.23-3.31.24 for Abby Kaplan (0209316) for 10/01/2023 - 03/31/2024	Abby Kaplan (0209316)	Yes
Federally Funded 10.1.23-3.31.24 for Abdullah Naveed (Terminated) (0181510) for 10/01/2023 - 03/31/2024	Abdullah Naveed (Terminated) (0181510)	
Federally Funded 10.1.23-3.31.24 for Abel Belachew (0137652) for 10/01/2023 - 03/31/2024	Abel Belachew (0137652)	
Federally Funded 10.1.23-3.31.24 for Abel Belachew (0137652) for 10/01/2023 - 03/31/2024	Abel Belachew (0137652)	

> Details

Effort Certification Status Report

50 of 50 items

Effort Certification	Employee	Type	Start Date	End Date	Status	Awaiting Persons 	Due Date	Days Past Due	Has Costed Changes	Is Effort Certification Change Multi-Company
Federally Funded for Sandra Simmons (0070944) for 03/26/2023 - 06/30/2023	Sandra Simmons (0070944)	Federally Funded	03/26/2023	06/30/2023	In Progress	Jamie McAdams			No	No
Federally Funded for Daniel Barry (0077343) for 03/26/2023 - 06/30/2023	Daniel Barry (0077343)	Federally Funded	03/26/2023	06/30/2023	In Progress	Jamie McAdams Myra Harris			No	No
Federally Funded for Frank Revetta (0061525) for 03/26/2023 - 06/30/2023	Frank Revetta (0061525)	Federally Funded	03/26/2023	06/30/2023	Certified	KS CostCenterManager Sara Jo Tomasek Theresa Sberna			Yes	No
Federally Funded for Tia Hughes (0089242) for 03/26/2023 - 06/30/2023	Tia Hughes (0089242)	Federally Funded	03/26/2023	06/30/2023	Submitted	KS GrantManager Sara Jo Tomasek Theresa Sberna			Yes	No
Federally Funded for Laura Reinert (0010636) for 03/26/2023 - 06/30/2023	Laura Reinert (0010636)	Federally Funded	03/26/2023	06/30/2023	In Progress	Lauren Milam			No	No
Federally Funded for Natasha Halasa (0039990) for 03/26/2023 - 06/30/2023	Natasha Halasa (0039990)	Federally Funded	03/26/2023	06/30/2023	In Progress	Natasha Halasa			No	No
Federally Funded for Shinieka Wilson (Terminated) (0069511) for 03/26/2023 - 06/30/2023	Shinieka Wilson (Terminated) (0069511)	Federally Funded	03/26/2023	06/30/2023	Certified	Rachael Pompura			Yes	No
Federally Funded for Laura Dugan (0119562) for 03/26/2023 - 06/30/2023	Laura Dugan (0119562)	Federally Funded	03/26/2023	06/30/2023	Certified	Shanti Venkatraman			Yes	No

Prepare for changes prior to your Administrative Review

The Salary Effort Trend report can be used to update for the changes you are making
https://www.vumc.org/myworkday/sites/default/files/public_files/Training/FIN/Effort_Trend_QRG.pdf

Exported from the Salary Cap Calculator -
<https://finweb.app.vumc.org/apps/DOFAppPAACalculators/PAACalculator?SOC=True>

Primary Costing Worktag	New Effort % on PAA	% Effort Charged to Grant	% Effort Over the Cap	Monthly Salary	\$ Amount to Grant	\$ Amount Over the Cap
prior to March	30.0000 %	14.4938 %	15.5062 %	\$ 11,482.50	\$ 5,547.50	\$ 5,935.00
In March	40.0000 %	19.3251 %	20.6749 %	\$ 15,310.00	\$ 7,396.67	\$ 7,913.33
	0.0000 %	0.0000 %	0.0000 %	\$ 0.00	\$ 0.00	\$ 0.00

																		UPDATED FOR CHANGE						
																		Effort %	Amount					
13	Job Profile	Worker	Grant	Cost Center	Fund	Program	Assignee	SOC Type	10/01/2023 - 10/31/2023 (US)	11/01/2023 - 11/30/2023 (US)	12/01/2023 - 12/31/2023 (US)	01/01/2024 - 01/31/2024 (US)	02/01/2024 - 02/29/2024 (US)	03/01/2024 - 03/31/2024 (US)	03/01/2024 - 03/31/2024 (US)	03/01/2024 - 03/31/2024 (US)	03/01/2024 - 03/31/2024 (US)	03/01/2024 - 03/31/2024 (US)						
14	2120 - Profess	Example W	GR098765	CC09999	IFD004	S1 (Blank)	AS0099999	(Blank)	14.01%	5,302.50	14.01%	5,302.50	14.01%	5,302.50	13.85%	5,302.50	14.49%	5,547.50	14.49400%	5,547.50	19.3251 %	7,396.68		
15	2120 - Profess	Example W	GR098765	CC09999	IFD004	S1 (Blank)	(Blank)	(Blank)	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00000%	0	0.00000%	0	0.00	
16	2120 - Profess	Example W	GR098765	CC09998	IFD001	G1 PG009876	E (Blank)	NIH Level II	15.99%	6,055.00	15.99%	6,055.00	15.99%	6,055.00	16.15%	6,180.00	15.51%	5,935.00	15.50600%	5,935.00	20.6749 %	7,913.32		
17	2120 - Profess	Example W	(Blank)	CC09997	IFD001	G1 PG006543	E AS0099999	(Blank)	45.00%	17,036.25	45.00%	17,036.25	45.00%	17,036.25	45.00%	17,223.75	45.00%	17,223.75	45.00000%	17,223.75	45.00000%	17,223.75	45.00000%	17,223.75
18	2120 - Profess	Example W	(Blank)	CC09997	IFD001	G1 PG006543	E (Blank)	(Blank)	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00000%	0	0.00000%	0	0.00	
19	2120 - Profess	Example W	(Blank)	CC09998	IFD001	G1 PG005432	E AS0099999	(Blank)	25.00%	9,464.59	25.00%	9,464.59	25.00%	9,464.59	25.00%	9,568.75	25.00%	9,568.75	25.00000%	9,568.75	15.00000%	5,741.25		
20	2120 - Profess	Example W	(Blank)	CC09998	IFD001	G1 PG005432	E (Blank)	(Blank)	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00000%	0	0.00000%	0	0.00	
21	Total								100.00%	37,858.34	100.00%	37,858.34	100.00%	37,858.34	100.00%	38,275.00	100.00%	38,275.00	100.00000%	38,275.00	100.00000%	38,275.00	100.00000%	38,275.00

In this example, we are making a change to effort for the month of March to increase GR098765 from 30% to 40% and we are reducing PG005432 by 10% to 15%.

The employee and the grant are subject to salary cap so we need to calculate the correct portion to charge the grant and the salary over the cap funding source.

Reviewer Assignments based on Default Org Cost Center

EFFECTIVE DATE
must be July 1, 2024, or
earlier for next Effort
Cert to route to correct
Effort Cert Reviewer

The screenshot displays the Workday interface for a 'Research Specialist Sr' profile. The left sidebar contains navigation options: Summary, Job, Compensation, Absence, Pay, and Contact. The main content area is titled 'Default Organizational Assignments' and lists the following details:

- CARTS: CTAAC Administrative - Administrative - Academic
- Company: Vanderbilt University Medical Center
- Cost Center: CC03020 Pediatrics - Infectious Diseases Div - CD Clin Re
- Function Code: FC18018 Instruction and Departmental Research
- Fund: FD001 General Fund
- Operating Entity: OEclin_RA Clinical Department Research and Adminis

Below this information, there is a section for 'Current and Future Costing Allocations' with 2 items. A dropdown menu is open, showing the following options:

- Actions
- Frequently Used
- Start Proxy
- Compensation
- Job Change
- Manage Work
- Organization
- Payment
- Payroll
- Payroll Interface
- Personal Data
- Procurement

The 'Organization' option is highlighted with an orange border. A tooltip for 'Change Organization Assignments' is visible, showing the address: '61 21ST AVE S NASHVILLE, TN 37232 United States of America'.

Effort Certification Status Updates

Effort Certification Reviewer Expectations

CONGRATULATIONS and THANK YOU!

- Workday role assigned to the person in the effort certification process tasked with performing the administrative review of those employees required to certify their effort
- Responsible for **reviewing** and **entering changes**, if needed, directly to the employee's effort for the certification period prior to the certifier's review
- Must be comfortable and familiar with the regular monthly effort conversations that occur as part of our effort compliance institutional practices
- Person in the workflow that a certifier will "send back" their certification to if **changes** are necessary
- Required training will be provided for anyone in this role
- Guide on Training Hub [Effort Certification Reviewer Effort Admin Review QRG.pdf](#)



Effort Certification Status Update

Effort Certification Reviewers – Thank you for your persistence!

	10.1.23 to 3.31.24 (due 7/31/24)	4.1.24 to 6.30.24 (due 10/31/24)
NOT IN WORKFLOW	19	27
ADMIN REVIEW	17	173
AWAITING CERTIFIER	20	113
% Uncertified	1.7%	10%
Certifications Remaining to Complete	56	313
Total Certifications Required	3241	3148

Please let us know how we can help you wrap this up because it is time to issue the next Effort Certification for the period July 1 to September 30, 2024



To expedite a PAA review, email vumc.effort@vumc.org

Effort Certification Process Next Steps

PREPARE **NOW** FOR THE NEXT EFFORT CERTIFICATION

- Review effort **now** for pay periods July 1 to September 30, 2024
- Corrections should be entered **now** as PAAs
- Do not wait until the Effort Certification is issued to review these periods
- We are continuing with the streamlined process
- Daily Office Hours will resume when the certification is issued

Streamlined process:

- Effort certification with changes does not auto-generate a PAA
- If you are an Effort Certification Reviewer, check the Teams Channel daily for updates!



Cost Transfer Questionnaire Responses on PAAs

Cost Transfer Questionnaire Responses on PAAs



Challenge: Users lost visibility of the Cost Transfer Questionnaire Responses after submitting Payroll Accounting Adjustments

Solution: Display a custom report on the Worker Profile Pay tab named “Cost Transfer Justification for PAAs”

Access: Grant Managers, Cost Center Managers



Complete Questionnaire

'I certify that the cost transferred is an appropriate expenditure for the sponsored grant/contract charged and that the expenditure complies with the terms and restrictions governing that sponsored grant or contract.' for Payroll Accounting Adjustment: [redacted] - 10/01/2023 - 10/31/2023 [more]

Cost Transfer Justification

Please provide cost transfer justification by providing response to the questions below. When submitting this questionnaire, you are attesting to your certification that the cost transferred is an appropriate expenditure for the sponsored grant/contract charged and that the expenditure complies with the terms and restrictions governing that sponsored grant or contract.

Why were these expenses originally charged to the cost center from which they are now being transferred? (Required)

Why should the charge(s) be transferred to the proposed receiving project (How does the project benefit)? (Required)

Why are the charges allowable and allocable based upon the terms and conditions of the receiving project? (Required)

What type of corrective action has been put into place to prevent future need for cost transfers of this type? (Required)

Are you complete with all changes for this reporting period? (Required)


- Yes
 No

Submit

Save for Later

Cancel

Cost Transfer Justification for PAAs (new tab)

MENU 

Mgr, ()

Actions






Email Team

- Summary
- Job
- Compensation
- Absence
- Pay**
- Contact
- Personal
- Performance
- Career
- Feedback

Search

Results Input Costing Allocations **Cost Transfer Justification for PAAs**


55 items     

Business Process Transaction	Submitted On	Questionnaire Answers	
		Question	Answer
Payroll Accounting Adjustment: [redacted] - 06/01/2024 - 06/30/2024	11/11/2024	Are you complete with all changes for this reporting period?	Yes
		What type of corrective action has been put into place to prevent future need for cost transfers of this type?	Corrections were submitted as soon as we were notified of effort changes to be made. Monthly meetings with faculty are occurring to reconcile effort.
		Why are the charges allowable and allocable based upon the terms and conditions of the receiving project?	The charges are allowable and allocable because this employee's effort was budgeted for this project, and the employee worked on this project for that period of time.
		Why should the charge(s) be transferred to the proposed receiving project (How does the project benefit)?	The employee worked on this project during this period of time
		Why were these expenses originally charged to the cost center from which they are now being transferred?	Employee's effort was not updated to reflect what true allocation should be. We are submitting this PAA to correct the employee's effort.
Payroll Accounting Adjustment: [redacted] - 07/01/2024 - 08/31/2024	09/25/2024	Are you complete with all changes for this reporting period?	Yes
		What type of corrective action has been put into place to prevent future need for cost transfers of this type?	Corrections were submitted as soon as we were notified of effort changes to be made. Monthly meetings with faculty are occurring to reconcile effort.
		Why are the charges allowable and allocable based upon the terms and conditions of the receiving project?	The charges are allowable and allocable because this employee's effort was budgeted for these projects, and she worked on these projects for this period of time.
		Why should the charge(s) be transferred to the proposed receiving project (How does the project benefit)?	This person worked on these projects during this time period.
		Why were these expenses originally charged to the cost center from which they are now being transferred?	We are submitting this PAA for multiple work tags for June 2024 - August 2024 to accurately reflect the employee's effort. The effort allocation percentages were

Items per page All 1-55 of 55 items



Cost Transfer Justification for PAAs (new tab)

MENU 

Research Professor

Actions

Email Team

Summary

Job

Pay

Search

Cost Transfer Justification for PAAs

20 items

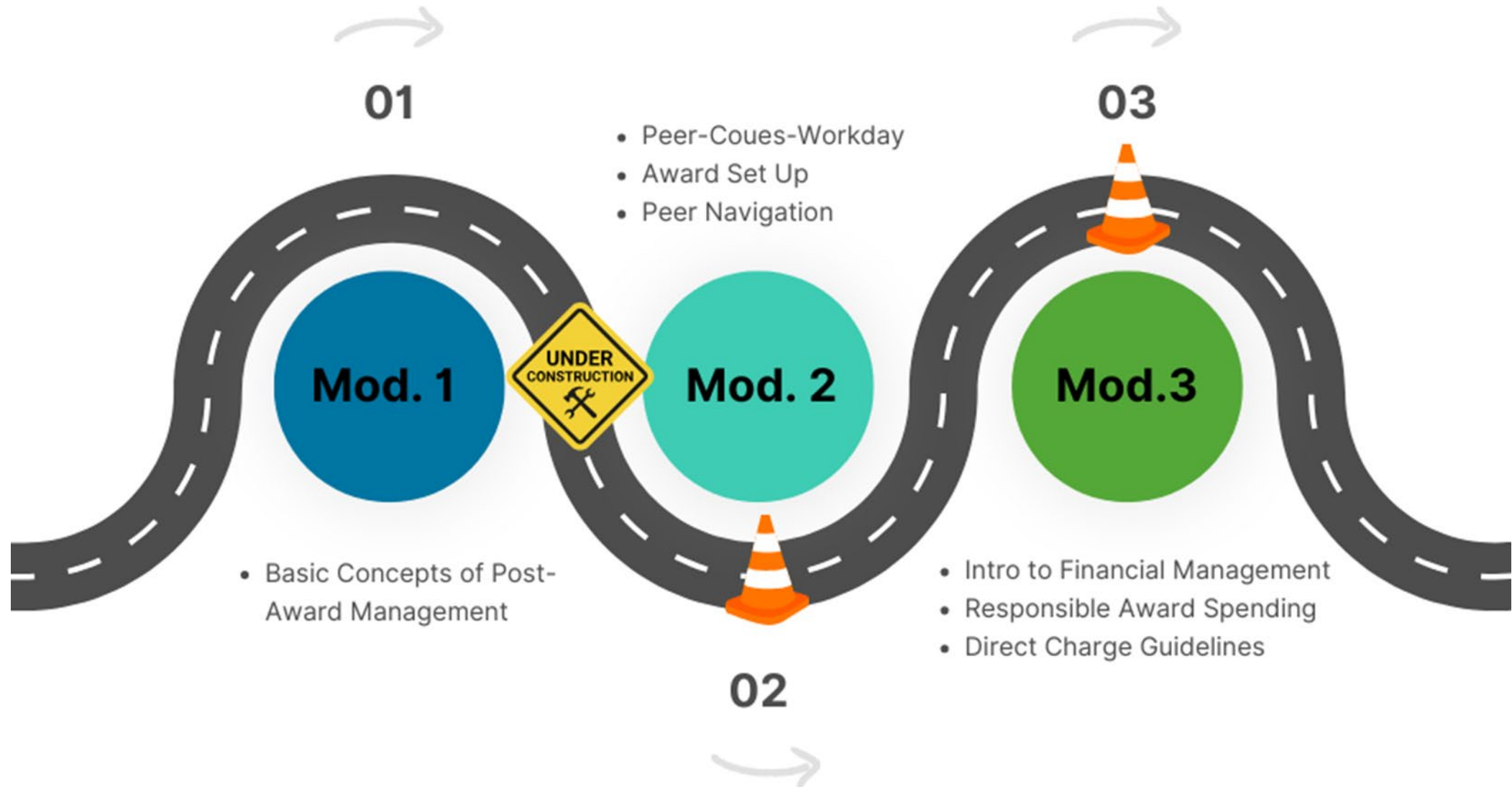
    

Business Process Transaction	Submitted On	Questionnaire Answers	
		Question	Answer
Payroll Accounting Adjustment: [redacted] - 08/01/2024 - 10/31/2024	11/15/2024	Are you complete with all changes for this reporting period?	Yes
		What type of corrective action has been put into place to prevent future need for cost transfers of this type?	Corrective action involves meeting and/or verifying effort distributions with our investigators on a monthly basis and providing updates to Workday in a more timely fashion.
		Why are the charges allowable and allocable based upon the terms and conditions of the receiving project?	These charges are allowable per the scopes of work and specific aims of these projects.
		Why should the charge(s) be transferred to the proposed receiving project (How does the project benefit)?	This reallocation reflects real effort spent on these awards. This reallocation is appropriate and directly benefits the goals of these projects.
		Why were these expenses originally charged to the cost center from which they are now being transferred?	This effort distribution was entered correctly at the time of entry.
Payroll Accounting Adjustment: [redacted] - 09/01/2023 - 09/30/2023	10/16/2023	Are you complete with all changes for this reporting period?	Yes
		What type of corrective action has been put into place to prevent future need for cost transfers of this type?	Workday tag dates updated on 10/16/23.
		Why are the charges allowable and allocable based upon the terms and conditions of the receiving project?	[redacted] effort is within the scope of work.
		Why should the charge(s) be transferred to the proposed receiving project (How does the project benefit)?	The effort directly benefits the grants as detailed in the proposal.
		Why were these expenses originally charged to the cost center from which they are now being transferred?	Effort was correctly allocated until 7/31/23.
Payroll Accounting Adjustment: [redacted] - 08/01/2023 - 08/31/2023	10/16/2023	Are you complete with all changes for this reporting period?	Yes



New Training Curriculum: Post-Award Essentials

Post Award Essentials



Basic Concepts of Award Management Topics



01

Workday Roles and Security

02

Workday Award Navigation

03

Central Office Contacts

Workday Security Roles



Supervisory Organization roles, like Manager



Financial, such as Cost Center Manager



Research & Grants, such as Grant Manager



Pegasus Request for additional Workday Security



MY REQUESTS

Your personalized requests view is below. This includes any draft requests, favorites and currently open/active requests.

- Favorite Requests
- Drafts
- Active Requests
- Recent Requests

OTHER REQUESTS

- General Purpose Request

Request Discovery

Do you need work or a service performed? This is a good place to start.

Search for a request:

Workday

SEARCH

Showing results for: **workday** (22 found)

SUGGESTED REQUEST: (based on your search)

WORKDAY APPLICATION DEPARTMENTAL SECURITY REQUEST

Use this form to request departmental roles (security groups) be newly assigned or removed from a worker in Workday. This request will require manager and Workday Security approval.

Fulfilled by: VUMC IT WORKDAY - APP SUPPORT

INFORMATION

SUBMIT

SEARCH RESULTS:

FINANCE

- WORKDAY ADAPTIVE PLANNING SECURITY REQUEST APP SECURITY - VHAN
- WORKDAY ADAPTIVE PLANNING SECURITY REQUEST APP SECURITY - VHS
- WORKDAY ADAPTIVE PLANNING SECURITY REQUEST APP SECURITY - VRSM
- WORKDAY CONFIGURATION ENHANCEMENT REQUEST

HUMAN RESOURCES

- WORKDAY CONFIGURATION ENHANCEMENT REQUEST
- WORKDAY REPORT REQUEST

WORKDAY

- WORKDAY APPLICATION CENTRAL OFFICE SECURITY REQUEST
- WORKDAY APPLICATION DEPARTMENTAL SECURITY REQUEST
- WORKDAY CONFIGURATION ENHANCEMENT REQUEST

OTHER

- WORKDAY - GENERAL QUESTION REQUEST
- WORKDAY ADAPTIVE PLANNING SECURITY REQUEST

Next Research Town Hall: December 19th