



## PEER Action Request: Add Award Line & Grant Worktag

This process allows department users to submit a PEER request for new WorkDay accounts to manage externally sponsored research projects. Grant Worktags replace GL Cost Center Numbers. A Grant Worktag will correspond to an Award Line in Workday. Users may only request new Workday Grant Worktags/Award Lines for Coeus proposals owned by their unit. The two most common reasons to submit such requests will be:

- Research team requires a WorkDay Grant Worktag/Award Line to begin spending ahead of receiving the signed contract or grant agreement
- Research team needs additional Grant Worktag(s)/Award Line(s) for project investigators to manage discrete portions of the budget (ex. Multi-PIs or Program Project Grants (PPGs))

PEER is used to submit the request, which goes to the VUMC Office of Sponsored Research (OSP) for processing. The appropriate OSP administrator will review the request and create the new Grant Worktag/Award Line in WorkDay.

**PEER MENU**

1. Select **Submit New Request** within the **Action Request** tile on the PEER homepage to begin a new request.
2. Select **Request New/Reallocate Workday Grant Worktag(s)**.

**Workday Related**

2 [Request New/Reallocate Workday Grant Worktag\(s\)](#)

Technical Support



## PEER Action Request - Page 2

Follow the steps below to complete a PEER Action Request to request new Grant Worktags/Award Lines on an Award in Workday.

### Begin Request

1. Instructions will appear at the top of the request. Select **Close** to continue.

#### Grant Worktags

1

X Close

WorkDay Awards can have multiple Grant Worktags where required by the terms of the agreement or where necessary for compliant management of the project. Office of Sponsored Programs (OSP) expects to create Grant Worktags without requests from the department for situations involving:

- Subsequent years where automatic carry-forward is not approved
- Supplements or funding that requires separate accounting
- Cost Share – either sponsor required or voluntary committed
- Outgoing subawards
- Program project cores as outlined in the award document
- Multiple CFDA Numbers
- Spend restrictions on certain parts of the budget
- Different F&A parameters
- Different billing or revenue recognition parameters

Contact your OSP Post-Award Specialist if you believe one of the above was not created appropriately for your project.

#### Departments will need to submit a request in ONLY two situations:

1. Research team requires a WorkDay Grant Worktag to begin spending ahead of receiving the signed contract or grant agreement
2. Research team needs additional Grant Worktags for project investigators to manage discrete portions of the budget (ex. Multi-PIs or Program Project Grants (PPGs))

**NOTE:** Departments should not request additional Grant Worktags to manage separate budget years when automatic carry-forward is allowed by the sponsor or terms of the agreement.



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The user will be asked to enter the Coeus Institute Proposal (IP) number as the primary way to begin the ticket. There will also be an option to begin using the VUMC contract number. If the ticket detects the contract has already gone to Coeus, it will pull the data from Coeus. If the contract has not yet been sent to Coeus, that process will be initiated, and the ticket will proceed using data from PEER. All externally sponsored research grants and contracts are eventually recorded in Coeus – including VA-IPAs and industry clinical trials.

*This process is not appropriate for projects that don't go into Coeus, such as gifts, internal funding, or non-monetary agreements.*

### Select Proposal

1. Enter the **Coeus Institute Proposal (IP)** number and select **Import Info from Coeus**.
2. If you don't know your Coeus IP Number, but you do know your WorkDay Award ID, you may search for the IP number by selecting **Find IP Number from WD Award ID**.
3. If you don't have a Coeus IP, enter the **VUMC Contract Number**. See Appendix on page 8 for beginning a PEER Action Request with a VUMC Contract Number.

The screenshot shows the PEER Action Request form. At the top, there is a navigation bar with 'PEER' and menu items: Home, Admin, Grants, Contracts, Action Requests, Notifications, and Help. The user name 'Chris Renee' is visible in the top right. Below the navigation bar, the page title is 'Action Request Menu > Home > Submit an Action Request'. The main heading is 'ACTION: Request New/Reallocate Workday Grant Worktag(s)'. A blue instruction box states: 'Instructions: Enter either a Coeus Institute Proposal Number or a contract VUMC number below, then click Import. Complete the remaining parts of the form that appears and then submit.' The form has three main sections, each with a numbered callout: 1. 'Coeus Institute Proposal (IP) Number' with a text input field and a callout '1'. 2. 'OCM Contract Number' with a text input field and a callout '3'. 3. A section with two buttons: 'Import info from Coeus' (callout '2') and 'Find IP Number from WD Award ID'. Below the 'OCM Contract Number' section, there is a section labeled '\*\* OR \*\*' with a 'VUMC' text input field and a callout '3', and a button 'Import info from Contract'.



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This example continues with the Coeus Institute Proposal (IP) information on the Action Request.

### Coeus IP

1. If the user enters a Coeus IP number, PEER will pull the appropriate data elements from Coeus.

The Coeus IP number is the essential ingredient because it will be associated with a specific year or modification of the project and contain the appropriate dates and dollars for that year/modification.

The screenshot shows the PEER Action Request form. At the top, there is a navigation bar with 'Action Requests' selected. Below the navigation bar, the breadcrumb trail reads 'Action Request Menu > Home > Submit an Action Request'. The main heading is 'ACTION: Request New/Reallocate Workday Grant Worktag(s)'. A blue instruction box states: 'Instructions: Enter either a Coeus Institute Proposal Number or a contract VUMC number below, then click Import. Complete the remaining parts of the form that appears and then submit.' The 'Coeus Institute Proposal (IP) Number' field contains 'M2103768' and is highlighted with a red circle containing the number '1'. To the right of this field are buttons for 'Import info from Coeus' and 'Find IP Number from WD Award ID'. Below the IP field, a green status message reads 'Proposal info imported.' The 'Project Information' section includes fields for 'WorkDay Award ID (Read-Only)' (AWD000439), 'Principal Investigator' (Leonard Bradshaw), 'Project Title' (Noninvasive markers of functional nausea in children), 'Sponsor' (National Institute of Child Health and Human Devel), 'Unit (Department)' (Surgery/General Surgery), and 'Department Contact/Requested By' (Chris Renner). The 'Financial Information' section shows a table of 'WorkDay Amounts (read only)' with columns for 'Direct Cost' (\$205758), 'Indirect Cost' (\$100477), and 'Total' (\$306235).

For situations where PEER **does** detect an existing WorkDay AWD number, the ticket will assume the request is for one or more additional WorkDay Grant Worktag(s)/Award Line(s).

For situations where PEER **does not** detect an existing WorkDay AWD number, the ticket will assume the request is for the creation of an entirely new WorkDay AWD record along with at least one Grant Worktag/Award Line.



## PEER Action Request - Page 5

Follow the steps below to complete a PEER Action Request to request new Award Lines on an Award in Workday.

### DOLLARS AND DATES

1. The **Financial Information** section contains Direct and Indirect Cost dollar amounts from Coeus. These amounts are read only and may not be changed.
2. **Budget Period Dates** are displayed from Coeus. These dates are read only and may not be changed.

#### Financial Information

1		WorkDay Amounts (read only)
Direct Cost	\$	205758
Indirect Cost	\$	100477
Total	\$	306235

#### Budget Period Dates

2		WorkDay Dates (read only)
Begin Date		2021-08-01
End Date		2023-07-31

### Create Additional Grant Worktags

1. Enter the **Originating Grant Worktag** that associated with an Award Line that is currently on the Award in Workday.
2. Add a **Description**.
3. Indicate the **Total Value** of the Grant Worktag.
4. Select the **Investigator and Unit**, which comes from the list in Coeus or PEER.
5. Complete the required **Reason** for the additional Grant Worktag. Choose one:

**Multiple PIs**

**Multi-Project or Cores**

**Other (must provide explanation)**

Note: VUMC Departmental management preferences is no longer an acceptable rational for additional child centers, now grant worktags. There must be a sponsor requirement for separate accounting or for separate initiatives as outlined in the proposal or awarding documents.

#### Create Additional Grant Worktags

Originating Grant Worktag	Description	Total Value (Direct + Indirect)	Investigator/Unit	Reason
1	2	3	4	5
		\$	Select One...	Select One... explanation text (required for "other")

Add a Row



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When requesting a new grant worktag, funds must be reallocated from other worktags in order to cover the costs.

### Reallocate Money Between Worktags, Additional Information, Attachments and Submit

1. Complete the **WD Grant Worktag that \$ is pulled from** with an existing grant worktag on the award that has funds to be transferred to the new one.
2. Complete the **WD Grant Worktag that \$ is put into** with the new worktag where funds are being transferred to.
3. Indicate the dollar amount to be transferred from one worktag to the other.
4. Indicate the total amount that is transferred in the **Reallocation Total**.
5. Provide optional **additional information** and/or attachments if they are pertinent to the request.
6. Select **Submit** at the bottom of the request.

**Reallocate Money Between Worktags**

WD Grant Worktag \$ is pulled from	WD Grant Worktag \$ is put into	Amount being transferred	
1	2	\$0 3	

Reallocation Total: \$ 4

**Additional Information**

Detailed Justification 5

1000 character(s) left

**Attachments**  
Optional. Add up to 3 attachments.

Choose File	no file selected
Choose File	no file selected
Choose File	no file selected

6



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### AFTER SUBMISSION

After submitting the ticket, the request will be logged similarly to other PEER Action Requests. The user will have access to review the status and provide additional comments to the appropriate OSP administrator.

1. To add comments, select **Change Status**.
2. Enter comments in **Comment Text**.
3. Select **Save**.

Action Request # 67122 X Close

#### Details

Status	Pending
Request ID	A67122
Request Type	Workday Related: Request New Award Line(s) in Workday
Requested by	Chris Renner
Date of Request	2023-02-27 09:29 AM

Details of Request

**costDirectRequested:** 32250  
**costIndirectRequested:** 0  
**costTotalRequested:** 32250  
**dateStartRequested:** 2023-02-01  
**dateEndRequested:** 2023-02-28  
**description:** Primary  
**amount:** 32250  
**investigator-unit:** Ambra Pozzi | Nephrology | 104375  
**reason:** other  
**reason-other:** no reason  
**justification:** this is a justification  
**contractTrackingId:**

**1** Change Status

#### Comments (newest first)

By	Date	Status	Comments
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contractTrackingId:

Change Status

Status of Request: Pending

Comment Text **2**

750 character(s) left

**3** Save Cancel

Send email notice of this comment to requester

#### Comments (newest first)

By	Date	Status	Comments
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## APPENDIX - Page 8

### SEARCHING BY VUMC CONTRACT NUMBER

The requestor can search using PEER VUMC contract number. If the record has been sent to Coeus, this search will connect with the Coeus Institute Proposal number automatically. If the record is not yet in Coeus, the PEER system will initiate that process but still allow the user to proceed with the ticket request based on PEER data.

1. Enter **VUMC Number**.
2. Select **Import Info from Contract**.
3. Select the correct **Contract**.

Return to page 5 to continue your request.

Tracking #	Type	Start Date	End Date	Direct Cost	Indirect Cost	Total Cost	Final Action	Coeus Institute Proposal #	Center #	Action
188872	AMENDMENT	2021-08-01	2021-08-31	0	0	0	Fully Executed			
188862	ORIGINAL CONTRACT	2021-04-01	2021-04-13	1000	290	1290				Select

### QUESTIONS?

Please email [BusinessEducation@vumc.org](mailto:BusinessEducation@vumc.org).