

# Research Workday Town Hall Agenda

August 15, 2024

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- Welcome
- Adding a New Supplier/Vendor
- Timely Pay on Invoices
- Effort Certification Update
- Principal Investigator Landing Page Update
- Topic Request Survey
- Q&A

# Adding a New Supplier/Vendor

# Requesting a New Supplier in Workday

Create Supplier Request

Please enter Supplier Name, Supplier Category, Justification, Phone, Address, Email, Supplier Contact, and Supplier Contact's Email. For Justification, please explain what products or services will be purchased, why this supplier was selected, and why we cannot use an existing supplier.

Worker \*

Supplier Name \*

DUNS Number

Unique Entity Identifier

Restricted to Companies

Supplier Category

Parent

Tax Authority Form Type select one

TIN Type

Tax ID

Justification

Contact Information Classification Attachments Supplier Contact

Phone

Add

Address

Add

Email

Cancel Save for Later OK

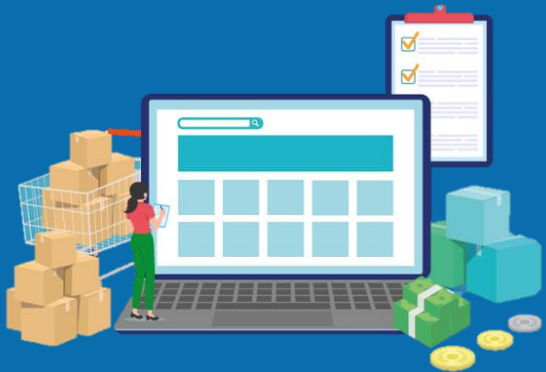
- All employees can request a new supplier to be added to Workday
- All request require manager approval
- Sourcing Team reviews the request for approval to move forward
- If approved, the Supplier Master team will initiate the onboarding process with the supplier via the Workday Supplier Portal
- Once supplier completes and submits all required information (i.e. W9/W8, banking, etc.), the VUMC team can complete the remaining processes for the vendor record
  - Examples of remaining process: OIG, banking and Tax ID verification, etc.
- Currently, average processing time from initial submission is 6 days
- Status inquires should be sent to: [yumcdsvendormaintenance@vumc.org](mailto:vumcdsvendormaintenance@vumc.org)

# Timely Pay on Invoices

# Invoices in Draft

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- Draft – Invoice is missing key pieces of information (or incomplete information) so it cannot be processed and is therefore not being paid
  - Invoices in draft status do not appear with match exceptions
- Reasons that an invoice falls into draft:
  - Invoice without a PO - need a WD PO, department must submit a requisition
  - Invalid PO - need a WD PO, department must submit a requisition
  - PO fully invoiced - department must contact Purchasing to resolve (new PO or change order)
  - Legacy PO - need a WD PO, department must submit a requisition
  - Supplier on invoice does not match supplier on PO - department must contact Purchasing to resolve (close incorrect PO, create new PO)
- Accounts Payable teams will reach out to the departments to address Invoices in Draft
  - Not visible to departmental users in Workday



# Effort Certification Update

# Compliance – Federal Regulations and Institutional Practices

## Effort Reporting and Certification in Workday

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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.

# Effort Certification Status Update

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**Effort Certification Reviewers – Thank you for your persistence!**

| Effort Cert Status as of 8-14-24 | % of Cert   |
|----------------------------------|-------------|
| CERTIFIED                        | 89%         |
| CURRENTLY IN WORKFLOW            | 9%          |
| CANCELLED, NOT ISSUED FOR PAA    | 2%          |
| <b>Grand Total</b>               | <b>100%</b> |

- Deadline for completion of effort certification for this period was **July 31, 2024**
- 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 April 1 to June 30, 2024**



To expedite a PAA review, email [vumc.effort@vumc.org](mailto:vumc.effort@vumc.org)



# Effort Certification Process Next Steps

PREPARE **NOW** FOR THE NEXT EFFORT CERTIFICATION

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- Review effort **now** for pay periods April 1 to June 30, 2024
- Corrections should be entered **now** as PAAs
- Do not wait until the Effort Certification is issued to review these periods
- At this time, we will continue to use the streamlined process
- Daily Office Hours will continue

## **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!



# Prepare for the next Effort Certification – Ongoing Effort Reporting and Certification in Workday

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- 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

## **Institutional practice and expectation:**

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



# Reviewer Assignments based on Default Org Cost Center

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

The screenshot displays the Workday interface for 'Costing Allocations'. The left sidebar shows navigation options: Research Specialist Sr, Actions, Email, Team, Summary, Job, Compensation, Absence, Pay, and Contact. The main content area is titled 'Default Organizational Assignments' and includes 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 table is partially visible with columns for 'End'.

An 'Actions' dropdown menu is open, listing various options. The 'Organization' option is highlighted with an orange border. A tooltip for 'Change Organization Assignments' is displayed, showing the option to 'View Roles for Worker Position'.

The worker's details are shown as follows:

- Worker**
- View Team**
- Contact**
- Email: [redacted]@vumc.org
- Work Address: 61 21ST AVE S NASHVILLE, TN 37232 United States of America
- 1161 21st Ave S MCN A3206 Nashville, TN 37232 United States of America
- Job**

IN CASE YOU MISSED IT...

[Research Administration Newsletter](#)



JULY 25, 2024

ISSUE 14

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### In This Issue:

- Cost Transfer Documentation
- Best Practices for Cost Transfer Justification and Support
- Effort Certification Process Update
- Effort Recertification
- PCA/PAA Tips
- Upcoming VPRAD Application Deadline

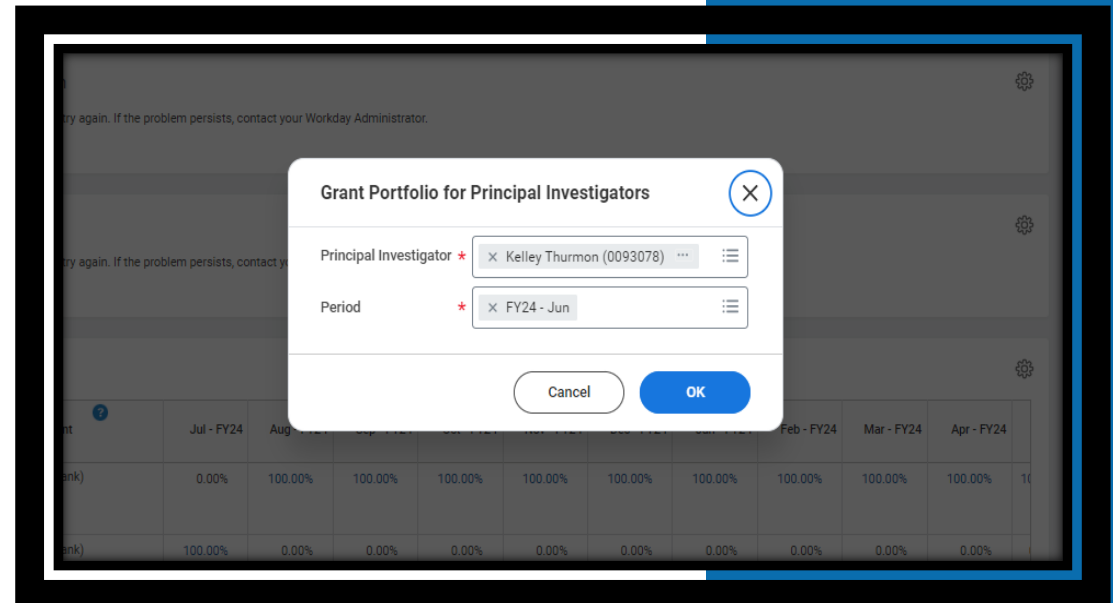
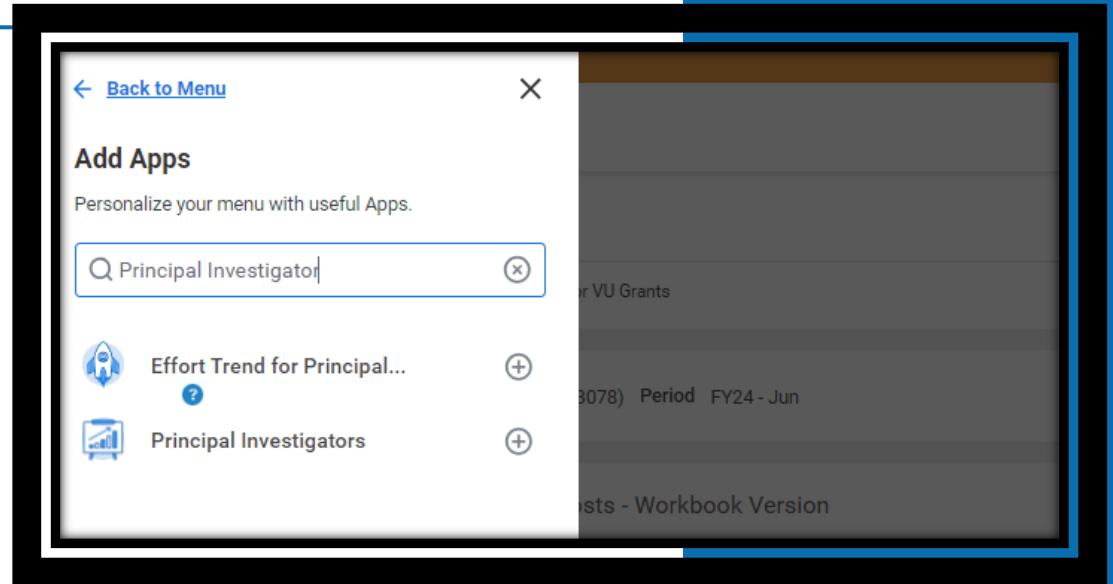
# Principal Investigator Landing Page Update

# PI Landing Page- Access

This page is available to all users with grant roles: Grant Manager, Grant Financial Analyst, and Principal Investigator

For quick access, add to the landing page to your apps

Default view is based upon your own security. If you are a grant manager or grant financial analyst, you can run the dashboard for PI specific data by changing the principal investigator name in the prompt



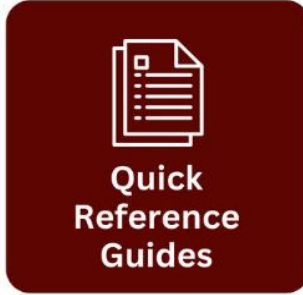
## TRAINING HUB



Town Halls & Workshops



Security Roles & Guides



Quick Reference Guides



WalkMe



Adaptive Planning  
(Forecast, Budget, LRP)



Additional Resources

<https://www.vumc.org/myworkday/traininghub>

### Training Quick Links

#### Town Halls and Workshops

- [Upcoming Town Halls](#)
- [Research Town Hall Recordings](#)
- [Upcoming Workshops](#)
- [Workshop Recordings](#)
- [HR Town Hall Recordings](#)

#### Security Roles & Guides

#### Quick Reference Guides

- [Adaptive Planning \(Forecast, Budget, LRP\)](#)
- [Getting Started in Workday](#)
- [Human Resources \(HCM\)](#)
- [Finance \(FIN\)](#)
- [Supply Chain \(SCM\)](#)
- [Tecsys](#)
- [Capital Planning](#)
- [Research and Grants](#)
- [Post Go-Live Support \(Pegasus\)](#)

#### Additional Resources

[PI Resources](#)

# PI Resource Page

Landing Page Overview



MyWorkday

Welcome Training Hub Workday Word Change Network Communications New Releases

## PRINCIPAL INVESTIGATORS

The **Principal Investigators Dashboard** in Workday provides PIs with comprehensive reporting for their awards. PIs can view their Grant Portfolio and their detail reports by Grant. Smart Tips within the report are available with WalkMe.

To access the Dashboard, log into Workday [here](#). Type and select **Principal Investigators** in the Workday search bar.

| Report Name  | Prompts  | Description  |
|--|--|--|
| <b>Grant Portfolio Tab</b>                               |  |  |
| Status Summary by PI for Direct Costs - Workbook Version | None required for PI. Report defaults to Awards for current PI and current Fiscal Period.    | Summary of direct costs per grant or award. Includes budget entered in Workday, actual spend, and remaining balance.   |
| VU Grant - Workbook Version                              | None required for PI. Report defaults to VU Grants for current PI and current Fiscal Period. | Summary of direct costs by VU grant. Includes budget entered in Workday, actual spend, and remaining balance.  |
| Effort Trend for Principal Investigators                 | None required for PI. Report defaults to Awards for current PI and current Fiscal Period.    | Displays 100% of the PI's effort for the last 12 periods. Note that the last period displayed is the last closed period.   |
| <b>Detail by Grant Tab</b>                               |  |  |
| CR Fin - Budget vs Actual for Grant or Award             | Grant number or name, and fiscal period (defaults to current)                                | Budgeted costs compared to actual spend per grant or award, displayed by direct cost category. Report also displays total direct and indirect costs for grant or award.  |
| Effort Trend for Principal Investigators                 | Grant number or name, and fiscal period (defaults to current)                                | This report displays the effort for staff and faculty charging effort to the grant(s) selected in the report prompt. The effort percentage displayed is summarized by fiscal period. Biweekly payrolls will be averaged. |

### Additional PI Resources

- [PI Resource Page](#)
- [WalkMe](#)
- [Workday Glossary](#)
- [Quick Reference Guides](#)
- [Reports in Workday](#)
- [Security Roles](#)
- [Workday Presentations](#)
  - [Research Town Hall Recordings](#)
  - [HR Town Hall Recordings](#)
- [Additional Resources](#)
  - [Research & Grants Resources](#)
  - [Workday Training Hub](#)
  - [Cost Center Translator](#)

Navigation Menu

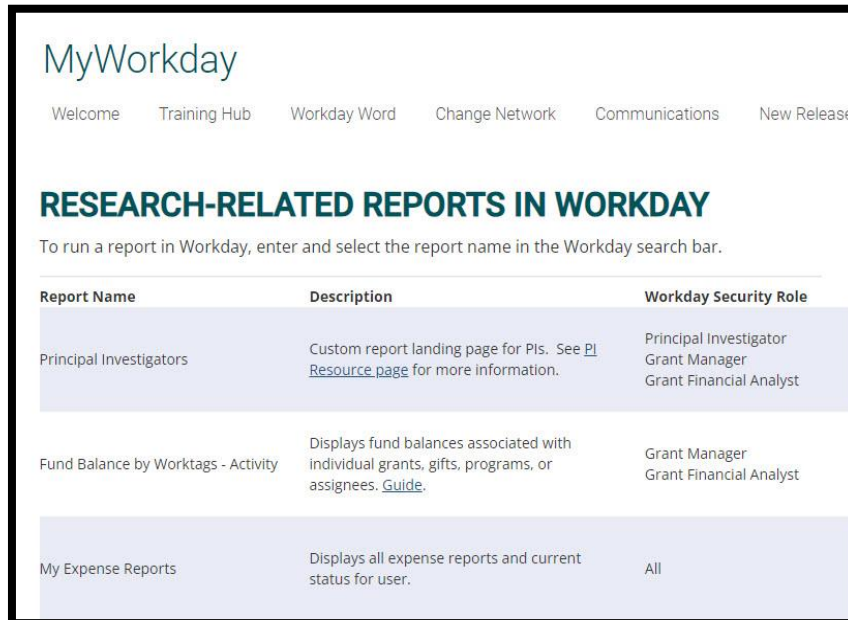




# PI Resource Page

## Helpful Guides

### Relevant Reports



The screenshot shows the MyWorkday interface with a navigation bar (Welcome, Training Hub, Workday Word, Change Network, Communications, New Releases) and a section titled "RESEARCH-RELATED REPORTS IN WORKDAY". Below the title is a brief instruction: "To run a report in Workday, enter and select the report name in the Workday search bar." A table lists three reports with their names, descriptions, and security roles.

| Report Name                         | Description  | Workday Security Role  |
|-------------------------------------|--|--|
| Principal Investigators             | Custom report landing page for PIs. See <a href="#">PI Resource page</a> for more information.                   | Principal Investigator<br>Grant Manager<br>Grant Financial Analyst |
| Fund Balance by Worktags - Activity | Displays fund balances associated with individual grants, gifts, programs, or assignees. <a href="#">Guide</a> . | Grant Manager<br>Grant Financial Analyst                           |
| My Expense Reports                  | Displays all expense reports and current status for user.  | All  |

### MyWorkday

Welcome Training Hub Workday Word Change Network Communications New Releases

### QUICK REFERENCE GUIDES

Guides are available for the following research-related Workday business processes. More information about specific security roles within Workday is available using the security roles link in the side task panel.

| Business Process               | Description   | Audience   | QRG Link  |
|--------------------------------|---|--|---|
| Effort Certification           | How individuals with federal effort certify in Workday.   | Faculty or staff with federally funded effort.                           |    |
| Effort Review & Approval       | How to complete the administrative review of an employee's effort distribution by the Effort Certification Reviewer before an employee certifies their effort in Workday. | Supervisors of staff with federally funded effort.                       |    |
| Outgoing Subaward Process      | Outline of each Step for setting up an outgoing subaward and receiving payment for an outgoing subaward in Workday.   | Faculty or Staff involved in the administration of outgoing subawards.   |  |
| Grant Notifications in Workday | How to view and act on grant-related notifications in Workday.  | Faculty or staff with financial responsibilities on a sponsored project. |  |



# Topic Request Survey

**Next Research Town Hall: Sept 12<sup>th</sup>**



Questions?