

# Research Workday Town Hall Agenda

February 20<sup>th</sup>, 2025

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- Welcome
- Research Administrator Responsibilities
- Space Survey
- Reporting Updates
- Training & Resources
- eProcurement Decommissioning
- Contracts BPO Dashboard
- Q&A

# Research Administrator Responsibilities

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## Pre -Award & Award Set Up

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### **Submit award all proposals & budgets at our negotiated rate.**

- Proposal questions should be directed to your assigned OSP Pre-Award Services Grant Manager and/or Specialist.

### **Make PEER requests timely when award changes are needed.**

- Actions such as pre-award spending requests, reallocation of award line amounts, and no cost extension requests should be done timely to facilitate timely billing in reimbursement of eligible costs.
- Questions about current awards should be directed to your assigned OSP Award Management contact.

# Research Administrator Responsibilities

## Effort Certification & Payroll Costing

**Institutional practice and expectation:**

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

### **Proactively maintain accurate payroll costing allocations**

[PCA / PAA Tips](#)

[PCA/PAA Tips for “New to Research Administration” Employees](#)

### **Prioritize making payroll accounting adjustments as soon as possible when needed**

[Responsibility for Review in PCAs and PAAs](#)

[Cost Transfer Documentation](#)

### **Complete effort certifications timely**

[Best Practices for Effort Reporting and Certification](#)

*Questions about effort certification and payroll adjustments should be directed to the Effort Reporting team [vumc.effort@vumc.org](mailto:vumc.effort@vumc.org)*



# Research Administrator Responsibilities

## Spend Management & Award Closeout

### Review and approve non-payroll transactions for allowability of direct costs timely

Prioritize accounting adjustments and journals as soon as possible when needed.

- [Direct Charge Policy](#)
- [Workflow Aging Report](#)

### Address instances of overspending (deficits) in a timely manner

- [Deficits Report Guide](#)
- Run WD Reports:
  - *Research Transaction Summary w/ employee as worktag*
  - *CR Fin - Budget vs Actual for Grant or Award*
  - *Status Summary by PI for Direct Costs*

# Research Administrator Responsibilities

## Spend Management & Award Closeout

### **Timely completion of financial reporting/closeout tasks**

- [Financial Reporting and Closeout Policy](#)
- [Award Tasks Guide](#)
- Run WD report *CR FIN Expiring Awards*

### **Award budget maintenance**

- [Creating\\_and\\_Amending\\_Award\\_Budgets\\_QRG.pdf](#)

### **Timely receipt and processing of subaward invoices from our subrecipients**

- [Finance Policy - Subrecipient Monitoring v.1](#)
- [Research Subcontracts QRG](#)

# Research Administrator Responsibilities

## Spend Management & Award Closeout

### Reminder to spend VU Endowed Chairs and Funds (VU Grants) per Utilization Guidelines

- Run WD report *CR RG VU Grant Remaining Balance – Grant Org Level*

*Questions about spend management, deficit oversight, and financial reporting should be directed to your assigned Finance Post Award*

*Sponsored Programs Manager [Award Management Contacts](#)*

# Space Survey



# FY25 Space Survey for Academic and Research Areas

## Coming Soon...

- 4-minute video explaining why, how, and when is available in The Learning Exchange

## 2025 Space Survey Timeline



The annual Space Survey provides the full accounting of the activities occurring and the people that work in your space.

Accurate space information is crucial in preparing a solid and defensible IDC rate proposal.

# Reporting Updates

# New Report

## CR Fin - Budget vs Actual for Grant or Award - Trended Actuals


The screenshot shows a web interface for configuring a report. At the top, the title is "CR Fin - Budget vs Actual for Grant or Award - Trended Actuals" with a close button (X). Below the title is a link "View Report Definition" with a three-dot menu icon. The main configuration area includes four fields: "Grant" (empty), "Award" (empty), "Period" (set to "FY25 - Feb" with a red asterisk and a three-dot menu), and "Budget Date" (placeholder "MM/DD/YYYY" with a calendar icon). At the bottom, there is a "Filter Name" input field, a "Manage Filters" link, a "Save" button, and a status "0 Saved Filters".

Important Reminders for  
all Budget vs Actual  
reporting

- LTD expense for sponsored awards is loaded into March 23 ledger period
- Remaining balance calculations in this report depend on accuracy of award budget. Keep budgets up to date for accurate reporting.

# New Report

## CR Fin - Budget vs Actual for Grant or Award - Trended Actuals

CR Fin - Budget vs Actual for Grant or Award - Trended Actuals ⋮ 



Grant

Period FY25 - Feb

9 items



Object Class	Grant	Purpose Code	Award	Grant From Date	Grant To Date	Project End Date	Budget	Mar - FY23	Apr - FY23	May - FY23	Jun - FY23	Jul - FY24	Aug - FY24	Sep - FY24	Oct - FY24
								Actuals	Actuals	Actuals	Actuals	Actuals	Actuals	Actuals	Actuals
Salaries		Research		07/01/2022	03/31/2025	03/31/2026	\$574,222.00	\$150,194.42	\$15,903.53	\$16,472.70	\$15,124.54	\$18,152.42	\$18,155.89	\$17,991.56	\$19,875.31
Fringe Benefits		Research		07/01/2022	03/31/2025	03/31/2026	\$120,407.00	\$34,035.80	\$3,584.45	\$3,742.65	\$3,496.90	\$4,281.49	\$4,282.45	\$4,065.33	\$4,760.45
Materials & Supplies		Research		07/01/2022	03/31/2025	03/31/2026	\$47,680.00	\$79,502.58	\$1,756.08	\$2,046.86	\$6,408.90	\$3,213.25	\$6,270.77	\$7,597.36	\$930.89
Other Direct Costs		Research		07/01/2022	03/31/2025	03/31/2026	\$199,790.00	\$1,600.98	\$5,944.97	\$28,052.61	\$6,159.51	\$5,795.05	\$6,655.43	\$7,812.65	\$5,763.46
Subaward Costs		Research		07/01/2022	03/31/2025	03/31/2026	\$0.00	\$23,723.07	0.00	0.00	0.00	0.00	0.00	0.00	0.00



# New QRG Available

## Cost Reimbursement Line Status Report

The Cost Reimbursable Line Status report allows the user to view the billing status for transactions on cost reimbursable award lines.

**Cost Reimbursable Line Status Report Prompts**

After searching for the Cost Reimbursable Line Status report in the Workday Search bar, select the search results for the prompt to pop-up.

Run the report by:

1. **Award**

OR

2. **Grant Worktag**

3. Select **OK**.

**Cost Reimbursable Line Status** [X]

Company: Vanderbilt University Medical Center

Sponsor

**1** Awards

Billing Status

Transaction Source

Fund

**2** Grant

Grant Status

Filter Name

Manage Filters Save

0 Saved Filters

Cancel **3** OK

Total expenses within this report should tie to ledger-based reporting for grants. This report is reconciled against the Research Transaction Summary at closeout to ensure all cost reimbursable expenses are billed.

# Training & Resources

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## Learning Exchange

- **Training Curriculum by Role** (Search: “Workday Curriculum”)
  - [Workday Curriculum: Grant Manager](#)
  - [Workday Curriculum: Grant Roles \(various\)](#)
  - [Workday Curriculum: Gift Roles \(various\)](#)
- **Post Award Essentials** (required for Grant Manager & Effort Certification Reviewer roles in Workday)
  - [Module 1: Basic Concepts of Post-Award Management](#) (live, virtual class)
  - [Module 2: Award Set up](#) (online, self-paced)



## Workday Training Hub

- [Town Halls & Workshops](#)  
Includes recordings of previous town halls and workshops along with schedule of upcoming town halls.
- [Security Roles and Guides](#)  
Overview of the various security roles available and recommended training.
- [Quick Reference Guides](#) – Research & Grants  
Guides for Grant & Award basics, Effort Certification & Reporting, PCAs/PAAAs, Cost Share, Sponsor Invoices, Subawards, and Reporting.

# eProcurement Decommissioning



# eProcurement Decommissioning

## Legacy System Update

- **Decommissioned January 2025**
- **Send request for copies to:**  
[vumcprocurement@vumc.org](mailto:vumcprocurement@vumc.org)
  - Include purchase order number and supplier name
  - If you are not the original requestor or approver, you will need to obtain approval from current department leadership prior to sending the request to purchasing

# Contracts BPO Dashboard Update

# Executive Summary

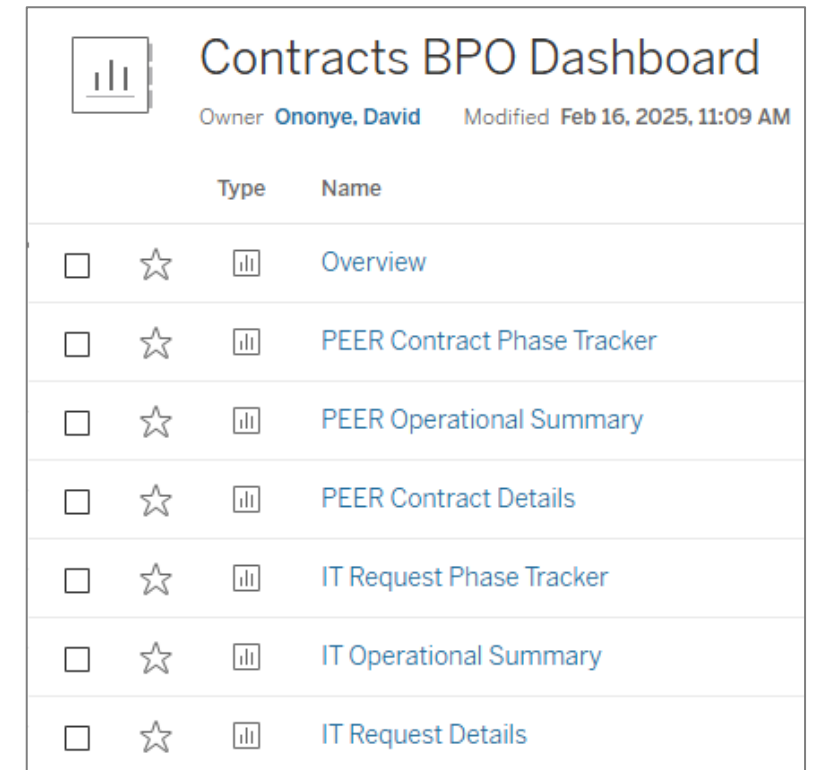
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- Business Process Optimization (BPO): a **workgroup** to address research administration concerns driven by Workday changes and associated activities
- Contracts BPO Dashboard provides **visibility into process stages for all VUMC contracts and IT requests**
  - The dashboard go-live, for the broader user group, was on January 24<sup>th</sup>, 2025
  - It includes actively processed PEER contracts and all IT requests
  - Systems are being enhanced and workflows are re-designed, which will provide more detail and better quality information to the same dashboard over time
- **Access to the Contracts BPO dashboard is restricted** – users are encouraged to log into the dashboard and follow the steps outlined on the [VUMC Office of Finance](#) website regarding permissions
- **Dashboard demonstrations** are available. Please reach out to the Enterprise Analytics contacts listed in this presentation and the [VUMC Office of Finance](#) website to schedule a demo.

# Contracts BPO Dashboard informs PEER contracts and IT request processing at VUMC

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- The dashboard can be accessed using the following link: [Contracts BPO Dashboard](#)
- Dashboard integrates information from PEER and JIRA (for IT)
- **Dashboard scope:**
  - PEER: contracts which are **actively being processed** (i.e., contracts inactive or fully executed contracts are no longer in the dashboard)
  - IT: **all requests processed in JIRA** after January 2022 (most start with a Pegasus request)
- **Dashboard content:**
  - Count of contracts / IT requests overall, by phase and status
  - Measures of timing / turnaround (note: data quality indicators are included in the dashboard)

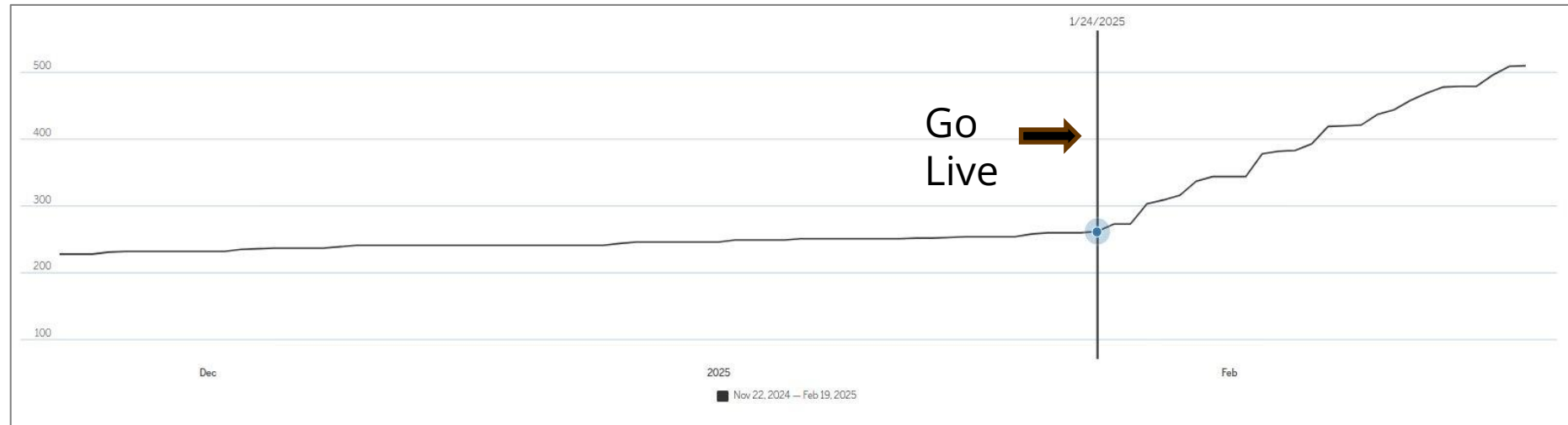


The screenshot displays the 'Contracts BPO Dashboard' interface. At the top, it shows the dashboard title, owner 'Ononye, David', and modification date 'Feb 16, 2025, 11:09 AM'. Below this is a table listing various dashboard components, each with a checkbox, a star icon, and a bar chart icon.

Type	Name
<input type="checkbox"/>	Overview
<input type="checkbox"/>	PEER Contract Phase Tracker
<input type="checkbox"/>	PEER Operational Summary
<input type="checkbox"/>	PEER Contract Details
<input type="checkbox"/>	IT Request Phase Tracker
<input type="checkbox"/>	IT Operational Summary
<input type="checkbox"/>	IT Request Details

# Key Takeaways

- Please set aside time to use and familiarize yourselves with the dashboard
- Usage has increased within first month of go live
- Enterprise Analytics is offering detailed demos to departments if helpful



- Please reach out to David Ononye ([david.ononye@vumc.org](mailto:david.ononye@vumc.org)) with questions and feedback regarding the dashboard

**Next Research Town Hall: March 20<sup>th</sup>**



Questions?