

Research Workday Town Hall

May 16, 2024

Research Workday Town Hall Agenda

May 16, 2024



- PI Dashboard Update
- FDM Guide
- Fund Balance by Worktags – Activity Report
- Commitments and Obligations for Fiscal Year End
- Effort Certification v. Recertification
- FedEx Update
- Q&A

PI Dashboard Update

PI Dashboard- Primary Reports

- Portfolio Tab
 - **PI Status Summary for Direct Costs – workbook version ; VU Grant - workbook version**
 - Displays budget vs. actual data by total award line (also includes commitments and obligations)
 - Includes award lines with lifecycle status- pending, active, internal closeout needed, closeout in progress
- Grant Detail and VU Grant Detail Tabs
 - **CR Fin - Budget vs Actual for Grant or Award; CR Fin - Budget vs Actual for VU Grant**
 - Displays budget vs. actual data by object class (budget category)
 - Includes award lines with lifecycle status- pending, active, internal closeout needed, closeout in progress
 - Reporting shows both direct and indirect costs
- **Effort Trend for Principal Investigators**
 - Displays all effort for workers on the grant selected
- These reports are now updated and available in Production for Administrators to review.

PI Dashboard- Preparation

Two areas of focus are critical to successful roll out of dashboard reporting:

1. Accurate award line statuses/dates
2. Accurate award line budgets

PI Dashboard- Award Line Status

The post award team is evaluating all award lines w/ end date in the past and award line in active status.

- Contact your post award accountant if:
 - An award closeout has been completed and award is still active in Workday
 - An expired award still needs closeout
- Contact OSP via PEER intake framework if:
 - An award line end date is not correct and requires correction



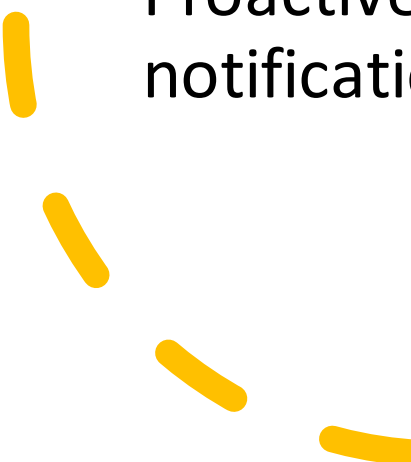
• CR FIN Expiring Awards

- Displays all award lines with end date in XX days (input into the prompt).
- Ex. If 10 days is input into the prompt, report output will display all award lines w/ end date 10 days into the future + anything in the past that is still active (which includes- Pending, Active, Internal Closeout Needed, Closeout in Progress)
- CR FIN Award Lines Expiring in XX Days will be retired

A screenshot of a software dialog box titled "CR FIN Expiring Awards". The dialog has a close button (X) in the top right corner. Below the title, there is a link "View Report Definition" with a three-dot menu icon. The main area contains two input fields: "Expiring Within XXX Days" with the value "180" entered, and "Sponsor_Program_Manager" which is currently empty. At the bottom right, there are two buttons: "Cancel" and "OK". The background of the dialog is white, and it is overlaid on a blurred background of a dashboard. At the bottom left of the dialog, there is a timestamp: "SR-0000004393 on 04/29/2024".




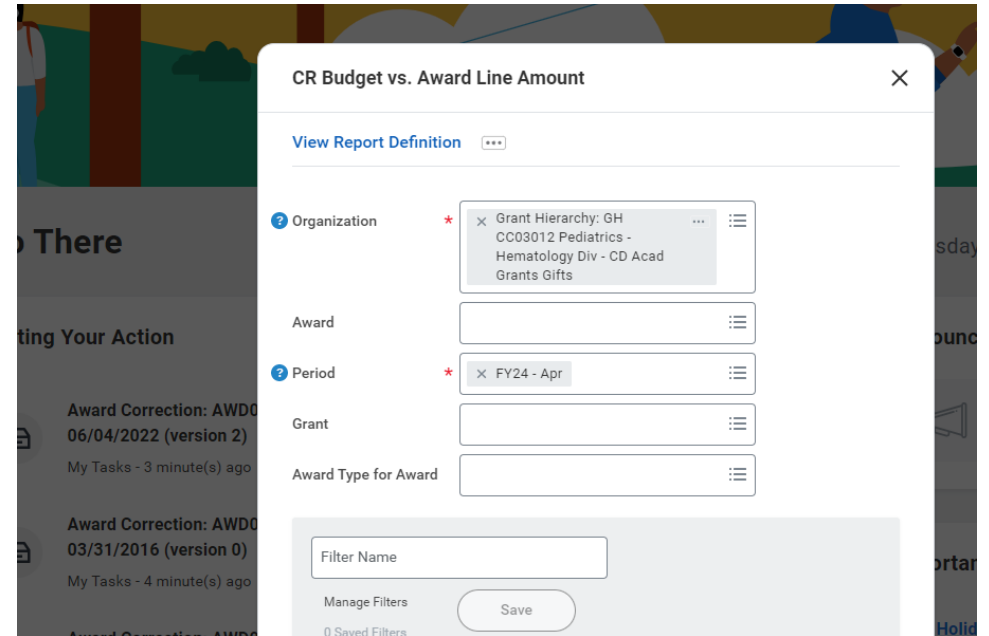
PI Dashboard- Award Line Status

- All NCEs need to be reported to OSP via PEER
 - Work with pre-award specialist for submissions (requests)
 - Work with award specialist for pre-approved extensions impacting grant end dates.
 - Proactively manage contract end dates by responding to PEER notifications (especially on continuous contracts with no end dates)
- 

PI Dashboard- Award Line Budget

Accurate budgets detail is necessary for Status Summary by PI reporting and other Budget vs. Actual reporting to provide meaningful data!

- Grant Managers are notified when new awards are created.
 - System generated notification is the primary mechanism available to alert a new budget needs entered.
- Grant Managers are notified when award corrections are processed.
 - System generated notification is the primary mechanism available to alert a budget amendment is needed.
 - Correction reasons that prompt notification include Award Activation, Award Line Addition, Funding Change.
- CR Budget vs. Award Line Amount 
 - Displays variances between award line amount and budget amount entered by grant.
 - Always prompt using grant or grant hierarchy as shown.



CR Budget vs. Award Line Amount

[View Report Definition](#)

Organization *

Award

Period *

Grant

Award Type for Award

Filter Name

Manage Filters

0 Saved Filters

PI Dashboard- Award Line Budget

IMPORTANT NOTES

- PI status summary reporting is for DIRECT COSTS only. To display accurate data within this report, you must at least enter budgets split by a direct and indirect category.
- If your award line amount in Workday is not correct (due to funding change, reallocation, etc. you will need to contact OSP for award correction (VIA PEER)
- If you did not create separate cost centers for subawards prior to Workday as requested, you will need to think through how to best manage your budgets:
 - Your budget may need to be split across the parent line (where pre-workday subaward expense is allocated) and the line set up for the subaward (if it continued).
 - Please keep in mind that moving subaward expense between award lines will result in F&A adjustments that are likely not correct on the parent award. This is not recommended.
- Don't forget about budgeting for indirect cost on subawards
 - Example: a new federal subaward line will be set up for the contract amount+ IDC. For \$50,000 subaward on an award with 73% IDC, the award line will be set up for \$68,250. Budget should be set up for \$50K subaward (direct cost) & \$18,250 (IDC).

FDM Guide

Foundational Data Model (FDM) Guide

The FDM Guide can be accessed from the [Workday Training Hub](#).

This guide includes...

- Basic principles to know when using Driver Worktags
- Detailed information on each Driver Worktag.
- How to use the Related Worktag report to find Grant, Gift, and Program Worktags associated with a cost center.

workday | **VUMC BUSINESS EDUCATION**

Understanding the Foundational Data Model (FDM)

The Foundational Data Model (FDM) is the structure on which VUMC processes, tracks, and reports transactions within Workday. It is a data structure that identifies who is responsible for the transaction, how the transaction is funded, what the money is used for, and the purpose of the transaction. Each component of the FDM is called a Worktag. This guide will explain the different Worktags that make up the FDM in Workday.

Rules For Using Worktags

1. A Driver Worktag will always auto-populate the pre-configured Related Worktags for a purchase or allocation.
2. **Only input one Driver Worktag***. Each unique combination of worktags used in transactions will impact reporting output.
3. If multiple Driver Worktags are entered, the system will auto-populate the Related Worktags based upon the **last** Driver Worktag entered.
4. Changes to Related Worktags will not automatically change any other Worktags (Driver or Related). This may result in errors if the Worktags do not match properly.

Funding Source Driver

- Grant
- Gift
- Program
- Cost Center**

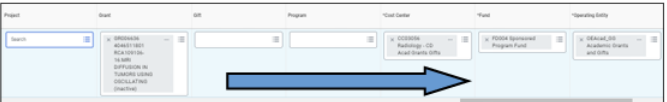
Non-Funding Source Driver

- Project


A Project ID will always require an additional Funding Source Worktag.

** A Cost Center is only input first and used as a Driver Worktag if there are no other funding sources involved.

* Capital Requisitions and Salary over-the-cap Allocations are the exception to the rule and will require multiple Driver Worktags.



REMINDER: Enter your Funding Source as the Driver Worktag first and allow other worktags to auto-populate. Generally forms in Workday will populate from **left to right** or **top to bottom**.



If you ever need adjust a form, always be sure to double check that all worktags are still correct before submitting. You may need to re-enter the Driver Worktag if something has changed.

Page 1 of 3

QUESTIONS?
Please email BusinessEducation@vumc.org

04-15-2024

Identifying Driver Worktags

Funding Source Driver Worktags

Grant

Gift

Program

Cost Center**

** A Cost Center is only input first and used as a Driver Worktag if there are no other funding sources involved.

Non-Funding Source Driver Worktags

Project

A Project ID will always require an additional Funding Source Worktag.

Related Worktags

All other Worktags that do not automatically populate other fields.

The screenshot displays a software interface for identifying driver worktags. On the left, a vertical list of worktag options is shown, with 'Project' highlighted in orange and 'Fund' through 'Additional Worktags' highlighted in blue. On the right, a series of input fields are arranged vertically, each corresponding to a worktag option and featuring a three-line menu icon on its right side.

Project	<input type="text"/>
Grant	<input type="text"/>
Gift	<input type="text"/>
Program	<input type="text"/>
Cost Center	<input type="text"/>
Fund	<input type="text"/>
Operating Entity	<input type="text"/>
Work Order	<input type="text"/>
Location	<input type="text"/>
Additional Worktags	<input type="text"/>

Understanding Driver Worktags

A Driver Worktag will always auto-populate the pre-configured Related Worktags for a purchase or allocation.

Only input one Driver Worktag*. Each unique combination of worktags used in transactions will impact reporting output.

If multiple Driver Worktags are entered, the system will auto-populate the Related Worktags based upon the last Driver

Changes to Related Worktags will not automatically change any other Worktags (Driver or Related). This may result in errors if the Worktags do not match properly.

Project	<input type="text"/>
Grant	<input type="text"/>
Gift	<input type="text"/>
Program	<input type="text"/>
Cost Center	<input type="text"/>
Fund	<input type="text"/>
Operating Entity	<input type="text"/>
Work Order	<input type="text"/>
Location	<input type="text"/>
Additional Worktags	<input type="text"/>

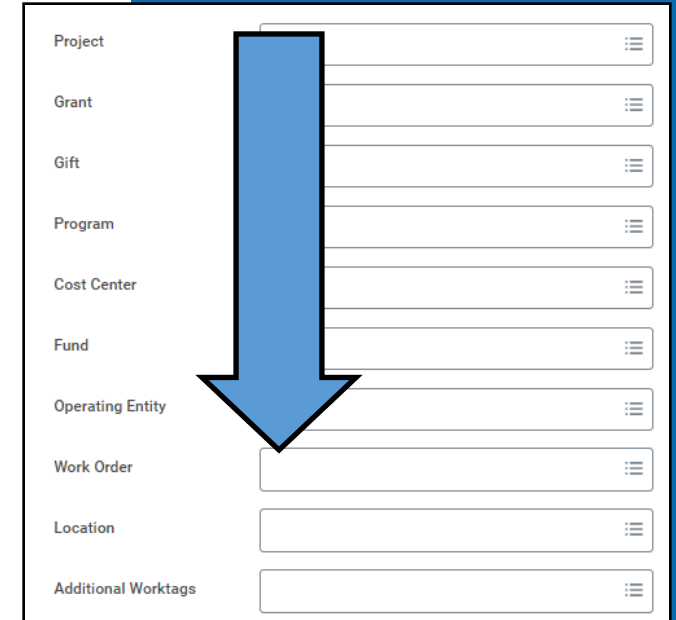


* Capital Requisitions and Salary over-the-cap Allocations are the exception to the rule and will require multiple Driver Worktags.

Entering Driver Worktags

REMINDER: Enter your Funding Source as the Driver Worktag first and allow other worktags to auto-populate. Generally, forms in Workday will populate from **left to right** or **top to bottom**.

If you ever need adjust a form, always be sure to double check that all worktags are still correct before submitting. You may need to re-enter the Driver Worktag if something has changed.



Project

Grant

Gift

Program

Cost Center

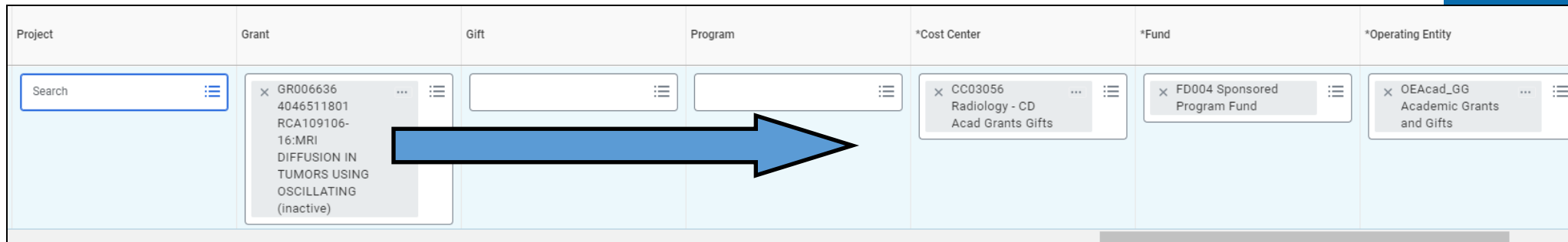
Fund

Operating Entity

Work Order

Location

Additional Worktags



Project	Grant	Gift	Program	*Cost Center	*Fund	*Operating Entity
<input type="text" value="Search"/>	<input type="text" value="GR006636 4046511801 RCA109106-16:MRI DIFFUSION IN TUMORS USING OSCILLATING (inactive)"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="CC03056 Radiology - CD Acad Grants Gifts"/>	<input type="text" value="FD004 Sponsored Program Fund"/>	<input type="text" value="OEAcad_GG Academic Grants and Gifts"/>

Fund Balance Reporting

Fund Balance Reporting

A new report is being delivered to provide a comparable view to the legacy Fund Balance reporting. The transition to Workday created accounting changes in areas of capital expenditures, sponsored research reporting and gifts. This report is meant to get our departmental users back to an apples to apples view with legacy data for cost center, grant and gift worktags while remaining true to the sponsored research and gift reporting that was already developed.

Fund Balance by Worktags – Activity 916 101

Company Consolidated Vanderbilt University Medical Center Period FY24 - May

Organization

302 items

Cost Center	Fund	Grant	Gift	Program	Assignee	Prior Year Fund Balance	Revenue and Contributions	Contra Indirect Cost Recovery Overhead	Expenses Less Depreciation	Transfers	Capital Purchases	Fund Balance Before Encumbrances	Commitments	Obligations	Fund Balance After Encumbrances
	FD001 General Fund		(Blank)		(Blank)	0.00	0.00	0.00	(\$10,674.62)	0.00	0.00	(\$10,674.62)	0.00	0.00	(\$10,674.62)
	FD001 General Fund		(Blank)		(Blank)	(\$369.32)	0.00	0.00	\$0.00	0.00	0.00	(\$369.32)	0.00	0.00	(\$369.32)
	FD001 General Fund		(Blank)		(Blank)	(\$46.79)	0.00	0.00	\$46.79	0.00	0.00	\$0.00	0.00	0.00	\$0.00
	FD001 General Fund		(Blank)		(Blank)	(\$231.44)	0.00	0.00	\$0.79	0.00	0.00	(\$230.65)	0.00	0.00	(\$230.65)
	FD001 General Fund		(Blank)		(Blank)	0.00	0.00	0.00	(\$460.93)	0.00	0.00	(\$460.93)	0.00	0.00	(\$460.93)
	FD001 General Fund		(Blank)		(Blank)	(\$460.42)	0.00	0.00	(\$830.33)	0.00	0.00	(\$1,290.75)	0.00	0.00	(\$1,290.75)
	FD001 General Fund		(Blank)		(Blank)	0.00	0.00	0.00	(\$2,489.15)	0.00	0.00	(\$2,489.15)	0.00	0.00	(\$2,489.15)
	FD001 General Fund		(Blank)		(Blank)	0.00	0.00	0.00	(\$523.16)	0.00	0.00	(\$523.16)	0.00	0.00	(\$523.16)

Medicine admin

WalkMe Menu:

Column Definitions

Prior Year Fund Balance	Revenue and Contributions	Contra Indirect Cost Recovery Overhead	Expenses Less Depreciation	Transfers	Capital Purchases	Fund Balance Before Encumbrances	Commitments	Obligations	Fund Balance After Encumbrances
0.00	0.00	0.00	(\$10,674.62)	0.00	0.00	(\$10,674.62)	0.00	0.00	(\$10,674.62)

Column	Help Tip
Prior Year Fund Balance	Net Assets Prior Year
Revenue and Contributions	Total Operating Revenues + Total Nonoperating Revenues and Expenses + Contributions + Contra Indirect Cost Recovery Overhead
Contra Indirect Cost Recovery Overhead	Accounts 4215 and 6430
Expenses less Depreciation	Total Operating Expenses - Depreciation Expense (non-cash item)
Transfers	Account 3700
Capital Purchases	Property, Plant and equipment, Net + Depreciation Expense + Other Noncurrent Assets (represents cost of equipment purchased)
Fund Balance before Encumbrances	Prior Year Fund Balance + Revenue and Contributions + Contra Indirect Cost Recovery Overhead - Expenses less depreciation - Transfers - Capital Purchases
Commitments	requisitions
Obligations	Purchase orders and Payroll Obligations
Fund Balance after Encumbrances	Fund Balance before Encumbrances - Commitments - Obligations

Filtering by Funds

Many of the sponsored research and gift reporting already developed was pre-filtered by funds, to provide the correct balances to users. The Fund Balance by Worktags – Activity report is meant to be used for cost centers, programs, grants and gifts, which means the end user will be required to correctly filter on Fund to return accurate data.

Sponsored Research (Grant Worktags including VU Endowments and VA IPA)

- FD004 Sponsored Program Fund
- Represents the billable activity to a grant worktag

Spendable Gifts

- Combination of FD001 General Fund and FD002 Temporarily Restricted Fund will return funds available to spend

Endowments (VUMC Endowments)

- For funds available to spend, please use the Departmental Gifts landing page
- To see full Market Value, view endowments with FD001, FD002 and FD003 Permanently Restricted Fund which includes the Corpus amount

Cost Centers, Programs (includes grant residuals), and Assignees

- FD001 General Fund

Commitments and Obligations for Fiscal Year End

Obligations and Commitments for Remaining Balance

Our Research Enterprise are the heaviest users of commitment and obligation data, for the purpose of calculating a Remaining Balance after Encumbrances. Special consideration should be taken for running reports during the fiscal year end process to ensure the best customer experience and data quality.

As a quick reminder, commitments are generated from approved requisitions, while obligations are generated from purchase orders and expected payroll results.

Status Summary by PI for Direct Costs - Workbook Version

Company for Organization Reporting Consolidated Vanderbilt University Medical Center Period FY24 - May

Principal Investigator

8 items

Award	Grant	Purpose Code	Principal Investigator	Grant From Date	Grant To Date	Budget	Actuals	Remaining Balance	Commitments	Obligations	Remaining Balance After Encumbrances	Percentage Remaining	Months Remaining	Remaining Balance per Month
		Research		07/15/2019	06/30/2024	\$233,314.00	\$185,245.49	\$48,068.51	\$29.29	\$3,739.66	\$44,299.56	18.99%	1	\$44,299.56
		Research		07/20/2021	06/30/2024	\$837,079.00	\$701,199.75	\$135,879.25	\$351.69	\$56,721.29	\$78,806.27	9.41%	1	\$78,806.27

GL period vs Budget Date

When Commitments and Obligations are created, liquidated, or updated, they post in the current open GL period. All obligation journals are also tagged with a Budget Date, which denotes the period in which the expense is expected to pay.

For best results during the year, reporting on obligations should be run for the current open GL period. Drilling or trending views should be built off the Budget Date field.

4026 items

Operational Transaction	Cost Center	Ledger Account	Ledger Account Type	Fiscal Year Name	Period	Accounting Date	Budget Date	Journal	Line Memo	External Reference ID	Journal Number	Amount	Status	Source	Supplier as Worktag	Purchase Orders
Payroll Obligation - P00041901 Clin/Tran Research Coord III		5000:Staff Salaries: Exempt	Expense	FY24	Jul	07/01/2023	11/30/2023	Q				554.93	Posted	Payroll Obligation		
Payroll Obligation - P00041901 Clin/Tran Research Coord III		5000:Staff Salaries: Exempt	Expense	FY24	Jul	07/01/2023	12/31/2023	Q				554.93	Posted	Payroll Obligation		

CR Fin - Department Salary Trend for Grant or Award

Company for Organization Reporting: Vanderbilt University Medical Center Organization: [Redacted]

Period: FY24 - Aug

5 items

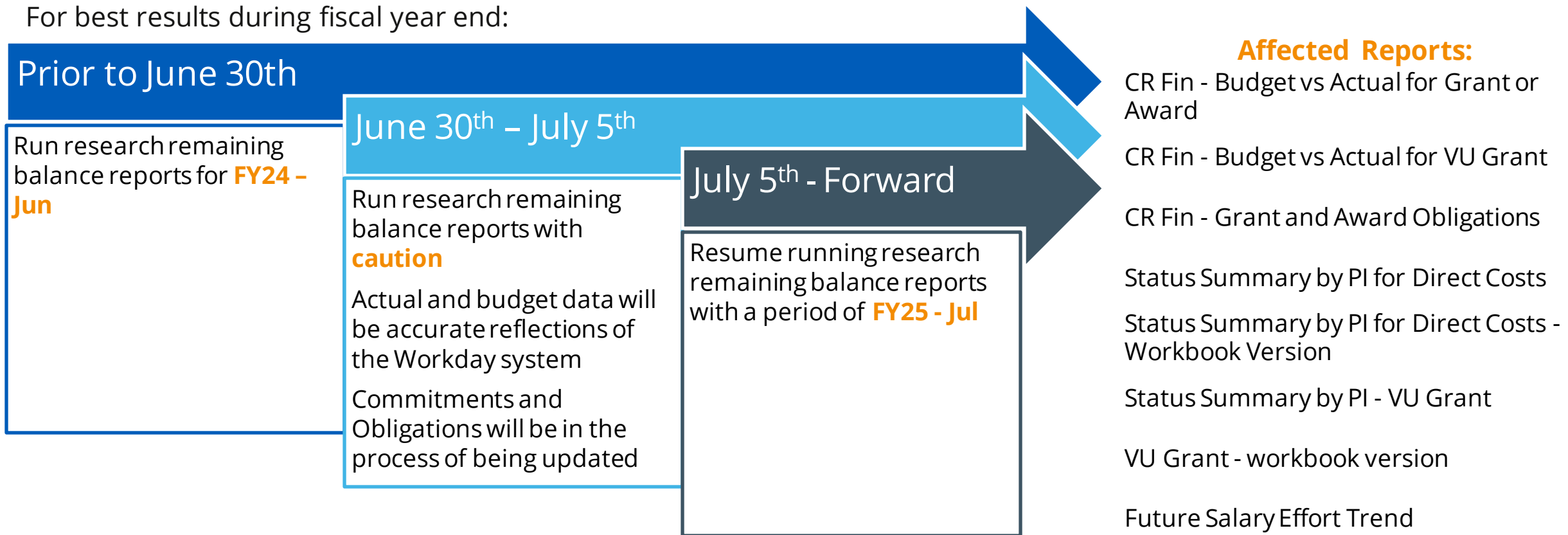
Employee	Ledger Account	Grant	Fund	Sep - FY24	Oct - FY24	Nov - FY24	Dec - FY24	Jan - FY24	Feb - FY24	Mar - FY24	Apr - FY24	May - FY24	Jun - FY24	Jul - FY25	Aug - FY25
				Total	Total	Total	Total	Total	Total	Total	Total	Total	Total	Total	Total
	5200:Faculty Salaries	GR013661 4043550333 UDK129924-02:EVALUATION OF NOVEL TECHNOLOGIES TO IMPROVE CLI	FD001 General Fund	845	845	845	845	845	845	845	845	845	845	845	845
	5200:Faculty Salaries	GR013661 4043550333 UDK129924-02:EVALUATION OF NOVEL TECHNOLOGIES TO IMPROVE CLI	FD004 Sponsored Program Fund	963	963	963	963	963	963	963	963	963	963	963	963
	5575:Fringe Benefit Expense	GR013661 4043550333 UDK129924-02:EVALUATION OF NOVEL TECHNOLOGIES TO IMPROVE CLI	FD001 General Fund	112	112	112	112	112	112	112	112	112	112	112	112
	5575:Fringe Benefit Expense	GR013661 4043550333 UDK129924-02:EVALUATION OF NOVEL TECHNOLOGIES TO IMPROVE CLI	FD004 Sponsored Program Fund	127	127	127	127	127	127	127	127	127	127	127	127
Total				2,047	2,047	2,047	2,047	2,047	2,047	2,047	2,047	2,047	2,047	2,047	2,047

The trending view on this report is built on Budget Date

Fiscal Year End Consideration for Research Obligations

For fiscal year end, all open obligations (Procurement and Payroll obligations) will need to be liquidated in the June FY24 GL period before being rebuilt in the July FY25 period. These processes will be run in tandem with the closing of the associated sub ledgers (Accounts Payable and Payroll). This upcoming fiscal year the obligation rollover process will begin on Sunday June 30th, and will complete by Friday July 5th.

For best results during fiscal year end:



Payroll Obligations Updates – New Notification

The screenshot displays a web application interface for grant management. The main header shows the grant ID 'GR015301' and the grant name 'Ferrell,Paul B; Delineating Drivers of Inflammation and Progression in Clona (2023-04-01)'. Below this, there are tabs for 'Details', 'Related Worktags', and 'Roles'. The 'Details' tab is active, showing various fields: 'Grant Name', 'Grant ID', 'Include Grant ID in Name', 'Inactive', and 'Included In'. A red box highlights the 'Usages' field, which contains the value '1'. An inset table shows award details with columns for 'Award', 'Award Line', 'Primary', 'From Date', and 'To Date'. The 'To Date' field is highlighted with a red box and contains the value '03/31/2024'.

Award	Award Line	Primary	From Date	To Date
AWARD_CONTRACT-3-5635- Delineating Drivers of Inflammation and Progressio 04/01/2023 (version 0)	AWARD_CONTRACT-3-5635 RC156 Federal Grant Revenue (Line 1)	Yes	04/01/2023	03/31/2024

Payroll obligations update for HCM transactions such as new hires, terminations, payroll costing allocation changes, and compensation changes on a bi-weekly schedule aligned with the bi-weekly payroll cycle. Obligations will update the first week of the pay period (i.e. week of 8/14, 8/28).

A new email notification has been configured to alert Grant Managers and Grant Financial Analysts when the process to update the obligation calculations has completed! Watch for an email from **VUMC Workday** with this text:

Payroll obligations have been calculated and posted for the VUMC company. Grant remaining balance reports are now updated based on the most current costing allocations and HCM worker record. Future effort trend reporting will reflect changes tomorrow, after the PRISM overnight refresh.

Effort Certification and Recertification in Workday

Recent Communications

May 6, 2024 – **Important Effort Certification Communications** (with Effort Certification in Workday email attached) to 236 CBOs, Effort Certification Reviewers*, and Grant Managers*

May 7, 2024 – **Effort Certification in Workday** to 2,972 Certifiers from first Effort Certification in Workday (403 were not emailed because they have since terminated employment to total 3,375 that certified)

May 9, 2024 – **Effort Certification vs Recertification** to 95 Effort Certification Reviewers to clarify questions resulting from other emails

May 14, 2024 – **Effort Certification vs Recertification** Teams Meeting attended by 78 Effort Certification Reviewers, CBOs, and those who support the effort process (recording is available for Effort Certification Reviewers who were unable to attend)



“Recertification” and “Effort Reporting Compliance Commitment” communicated to Certifiers on May 7, 2024

Sent on behalf of Scott Phillips and Susan Meyn:

Thank you for certifying your effort during our first effort certification period (3/26/23- 9/30/23) in Workday. We want to provide additional information about the recertification process in Workday and reiterate VUMC’s commitment to abiding by federal regulations and effort reporting compliance.

Reviewing and ensuring effort is correct prior to certification is essential to effort reporting compliance. When changes are made to a previously certified effort period, recertification of that same effort period is now required, consistent with our historical practices.

This initial recertification process was delayed to May 7, 2024 to incorporate process improvements based on the feedback and experience from the first effort certification. Once the recertification process is initiated in Workday, recertification will become a part of our regular effort processes and will occur weekly. This was a routine part of our process historically in ePAC and will become a regular part of process in Workday once initiated. This has been communicated to our Effort Certification Reviewers with the expectation of timely review as they are the first step in this workflow. The concept of “recertification” was presented in the Research Town Hall on April 18, 2024, view at <https://share.vidyard.com/watch/nvC2tCrobQWC5PaE79r9vF>.

- If you have requested changes to the previously certified period, you will receive a request in your Workday inbox to “recertify” your effort report. This effort report will replace the report you originally certified. If you have any questions related to the information in your effort report, please contact your department administrator, and email vumc.effort@vumc.org. This process begins on May 7 in Workday.
- If you have not requested any changes to the previously certified period but have outstanding questions about your certification, please contact your administrator and Tesha Garcia-Taylor and email vumc.effort@vumc.org. It is critical that we receive and resolve all questions related to the effort certification process. We may not be able to address all workflow requests associated with the new system, but we plan to address all questions regarding certified effort.
- You are able to review your certified effort for the first effort certification period by searching [Effort Certification Status for the period 3.26.23 to 9.30.23 – Self](#) and entering your name.

Before the next effort certification is initiated on May 24, 2024 for the period October 1, 2023 – March 31, 2024, you will receive a summary of improvements to the process and an updated quick reference resource.

IF YOUR EFFORT WAS CORRECT THAT YOU PREVIOUSLY CERTIFIED AND YOU HAVE HAD NO CHANGES,

STOP READING NOW



DO YOU HAVE ANY QUESTIONS ABOUT THE PREVIOUSLY CERTIFIED EFFORT PERIOD?

CONTACT VUMC EFFORT, YOUR DEPT ADMINISTRATOR, AND TESHIA



HAVE YOU HAD ANY CHANGES TO THE ORIGINAL EFFORT PERIOD?

YOU WILL RECEIVE A '**RECERTIFICATION**' SOON



DO YOU WANT TO CHECK YOUR EFFORT THAT YOU PREVIOUSLY CERTIFIED?

Run Effort Certification Status for the period 3.26.23 to 9.30.23 - Self - THERE WILL NOT BE A SUBMIT BUTTON - YOU ARE SIMPLY VIEWING YOUR PREVIOUSLY CERTIFIED EFFORT

What is 'Recertification' of Effort?

- When changes have been made to a previously certified effort period, recertification of that same effort period is required
 - Every effort should be made to ensure that the original certified Effort Report is correct
 - To minimize the need to recertify, the original Effort Report should be carefully reviewed before it is certified by the employee
 - Yes, that point was repeated twice...
- Recertifications, if required, will begin arriving in your Effort Certification Work Area and Inbox in the next few weeks
- You will see warning during PAA entry, "Effort has already been certified, recertification may be required if this change impacts a federal award."



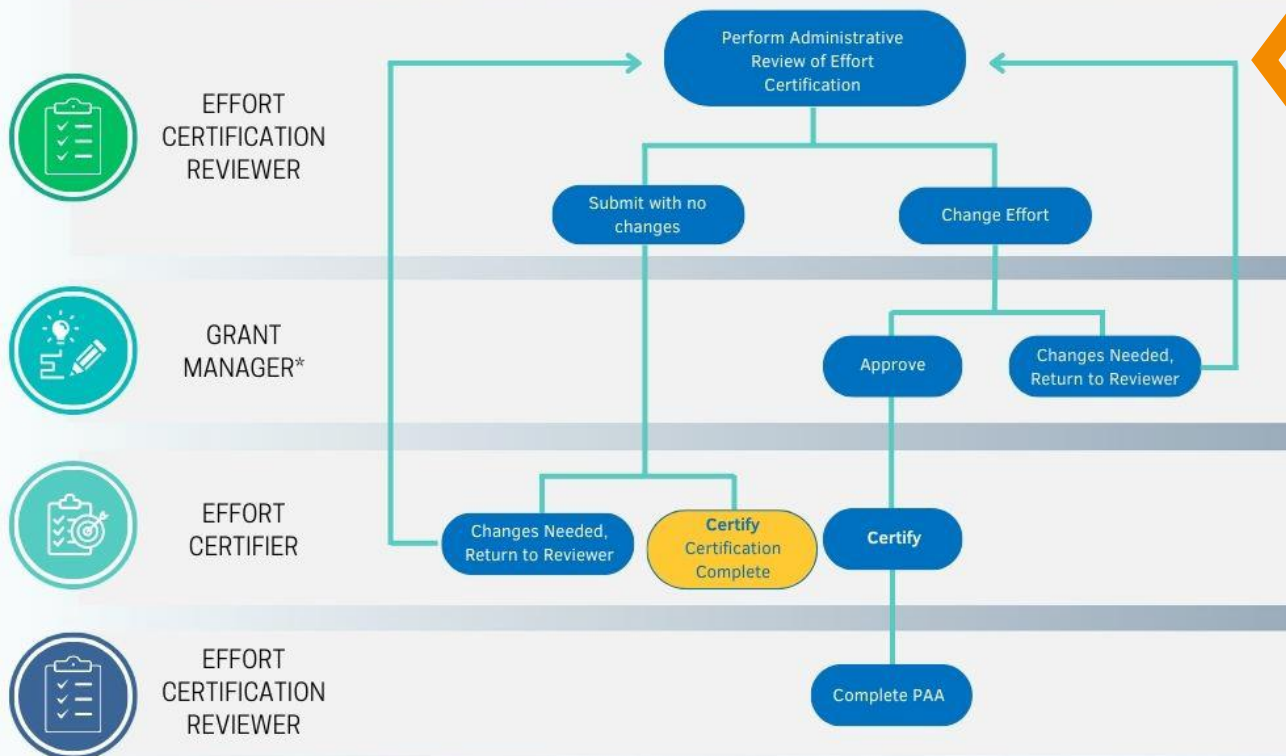
Institutional practice and expectation:

Although it is sometimes necessary, making changes to previously certified effort periods is not a best practice.

Getting effort correct, actual effort worked and charged, the first time is the best practice.

When is 'Recertification' of Effort?

EFFORT CERTIFICATION ROLES* AND RESPONSIBILITIES



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

For the recertification process, the first stop is the Effort Certification Reviewer's Workday inbox for the Administrative Review step (same as the Effort Certification process).

These will likely trickle in in batches this week and next as each one has to be manually initiated. You will also find them in your Effort Certification Work Area.

YOUR INBOX – PAY ATTENTION TO DATES (SOON)

All Items 35 items

Search: All Items

[Advanced Search](#)

- Effort Certification: Federally Funded for [redacted] for 10/01/2023 - 03/31/2024**
Due: 05/19/2024
- Effort Certification: Federally Funded for [redacted] for 10/01/2023 - 03/31/2024**
Due: 05/19/2024
- Effort Certification: Federally Funded for [redacted] for 10/01/2023 - 03/31/2024**
Due: 05/19/2024
- Effort Certification: Federally Funded for [redacted] for 10/01/2023 - 03/31/2024**
Due: 05/19/2024
- Effort Certification: Federally Funded for [redacted] for 10/01/2023 - 03/31/2024**
Due: 05/19/2024
- Effort Certification: Federally Funded for [redacted] for 03/26/2023 - 09/30/2023**
Due: 05/17/2024

Created: 05/10/2024 | Due: 05/17/2024

Administrative Review

Details | Effort Certification Status: In Progress | Changed Status: Unchanged

Summary | Aggregate | Details | Positions | Organizations | Process History

Summary 1 item

Effort Certification Summary				
Costing Company	Worktags	Certified Amount Estimated	Certified Percentage of Group Estimated	Certified Percentage of Total Estimated
Regular (Salary) (REGSAL)				

enter your comment

Process History

- Tesha Garcia-Taylor (0066409)** 3 days ago
Effort Certification– Step Completed
- [redacted]** Due 05/17/2024
Administrative Review– Awaiting Action

[Submit](#) [Change Effort](#) [Save for Later](#)

Administrative Review – Same as Effort

Sandbox - vumc

On behalf of:

MENU



Search



Administrative Review

Details

Effort Certification Status
In Progress

Changed Status
Unchanged

Summary

Aggregate

Details

Positions

Organizations

Process History

11 items

Award	Sponsor Award Reference Number	Sponsor	Grant	Fund	04/01/2023 - 04/30/2023 (US Monthly)		05/01/2023 - 05/31/2023 (US Monthly)		06/01/2023 - 06/30/2023 (US Monthly)		07/01/2023 - 07/31/2023 (US Monthly)		08/01/2023 - 08/31/2023 (US Monthly)		09/01/2023 - 09/30/2023 (US Monthly)		Total Certified Percentage Estimated	Total Certified Amount Estimated	
					Effort Certification Percent Estimated	Effort Certification Amount Estimated	Effort Certification Percent Estimated	Effort Certification Amount Estimated	Effort Certification Percent Estimated	Effort Certification Amount Estimated	Effort Certification Percent Estimated	Effort Certification Amount Estimated	Effort Certification Percent Estimated	Effort Certification Amount Estimated	Effort Certification Percent Estimated	Effort Certification Amount Estimated			
		John E. Fogarty International Center		FD004 Sponsored Program Fund	10.00%		10.00%		10.00%		10.00%		10.00%		10.00%		10.00%		
		John E. Fogarty International Center		FD004 Sponsored Program Fund	15.00%		15.00%		15.00%		15.00%		15.00%		15.00%		15.00%		
		John E. Fogarty International Center		FD004 Sponsored Program Fund	5.00%		5.00%		5.00%		5.00%		5.00%		5.00%		5.00%		
		National Institute of Diabetes & Digestive & Kidney Disease		FD004 Sponsored Program Fund	10.00%		10.00%		10.00%		10.00%		10.00%		10.00%		10.00%		
		National Institute of Neurological Disorders		FD004 Sponsored Program	5.00%		5.00%		0.00%		0.00%		0.00%		0.00%		1.67%		
		Treatment Gap in A		FD004 Sponsored	0.00%		0.00%		5.00%	1,355.16		5.00%	1,355.16		5.00%	1,355.16		3.33%	5,420.64

Submit Change Effort Save for Later



FedEx Update

FedEx Updates

We have been working to gather information surrounding our FedEx packages receiving and delivering to identify improvement

FedEx Delivery Confirmations

- Once FedEx arrives to our docks, all packages are received on the truck.
- Packages are then unloaded and taken to Receiving, sorted by location and priority, then delivered.
- FedEx typically takes 1 hour to deliver packages to Receiving and at least another hour to sort 300+ packages by location.
- Any phone calls, bad addresses, missing addresses can increase this time.

FedEx Deliveries: Wrong Addresses



- We have noticed 1-5 packages a day that contain the incorrect delivery addresses
- These incorrect delivery addresses cause the team to stop delivering packages and find the correct address by emailing, calling the shipping company etc.
- The example below stated to deliver to 624. The package was refused, researched and ultimately delivered to 476.
- Due to the added increased delivery time staff will need to ensure these are correct or they cannot be delivered.

FedEx Deliveries: No Labeling on Packages

- We received multiple packages with FedEx labels missing and FedEx had just written with marker.
- The team had to call the distributor to get the PO number for the full delivery address
- These packages will be refused if caught when FedEx is delivering or will wait until last part of the day to review and be placed on the Lost and Found Rack .



FedEx Deliveries: Package Refusal

- We have had several package refusals when the person on the package was out when the package was delivered. Staff attempted multiple times to deliver the temp sensitive package.
- The package was unable to be delivered, therefore an email was sent to the person for pickup in Receiving.
- Make sure that someone is present to receive packages when needed

Purchase Order [PO100000340948](#) Status [Issued](#) Invoice Status [Fully Invoiced](#)

Summary

Company [Vanderbilt University Medical Center](#)
Purchase Order Type [Supplies](#)
Supplier [AGILENT TECHNOLOGIES INC](#)
Currency [USD](#)
Document Date [04/29/2024](#)
Line Total Amount [1,872.77](#)
Requisition Type [Supplies](#)
Auto Sourced [Yes](#)

Terms and Taxes

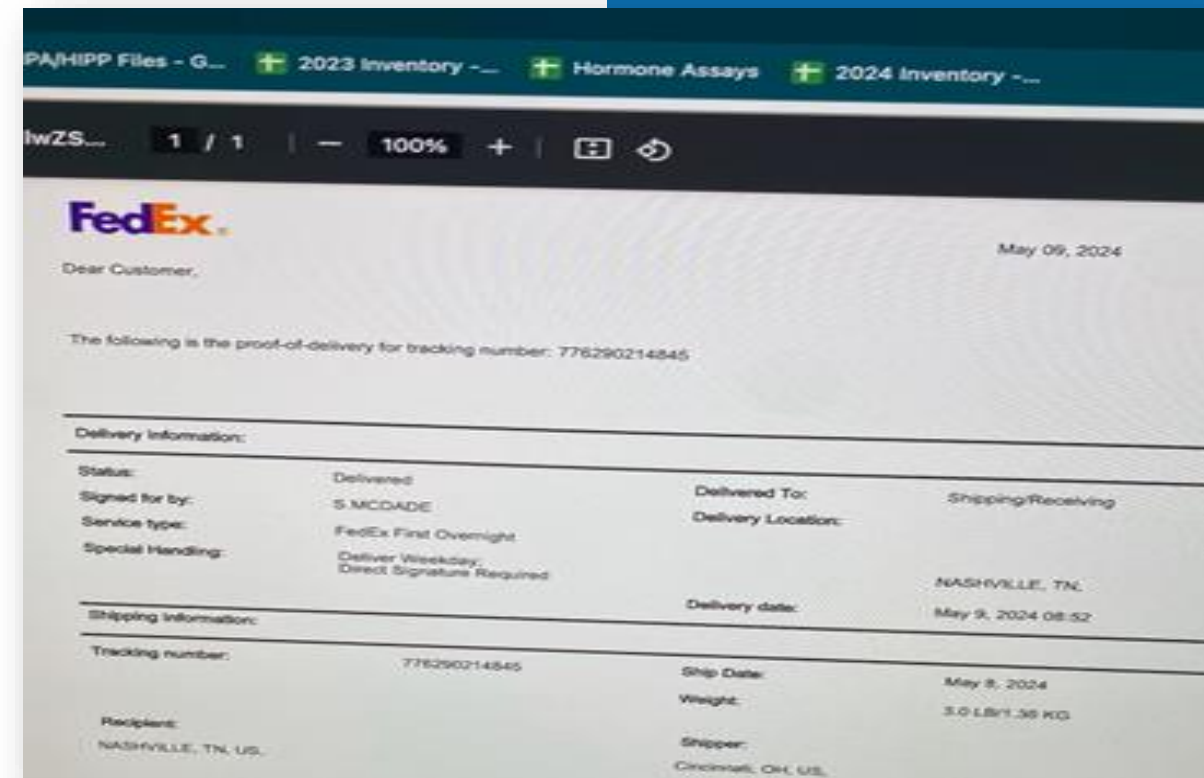
Payment Terms [Net 30](#)
Due Date [\(empty\)](#)
Default Payment Type [ACH](#)
Override Payment Type [\(empty\)](#)
Credit Card [\(empty\)](#)
Shipping Terms [FOB Origin](#)
Shipping Method [Overnight](#)
Shipping Instructions [Packages must not be greater than 150 pounds.](#)
Default Tax Option [Calculate Tax Due to Supplier](#)

Contact Information

Issue Option [EDI](#)
Buyer [Terrance Allen \(0033673\)](#)
Bill-To Contact [Terrance Allen \(0033673\)](#)
Bill-To Contact Detail [Terrance Allen \(0033673\)](#)
Bill-To Address [60 Athletes Way N. Suite 200 Mt. Juliet, TN 37122 United States of America](#)
Ship-To Contact [Judy Romero \(0018303\)](#)
Ship-To Contact Detail [Judy Romero \(0018303\)](#)
Ship-To Address [MRB4 GI STE 1015A 2215 GARLAND AVE NASHVILLE, TN 37232 United States of America](#)
Memo [\(empty\)](#)
Internal Memo [\(empty\)](#)

FedEx Deliveries: Delivery Confirmations

- Several emails weekly relating to packages that we have not received but FedEx has deemed delivered.
- We did an extensive review of the packages to determine these were not delivered to our location.
- Staff will need to connect with FedEx for future issues such as this.



FedEx Deliveries: Improvements

- Email address for all FedEx Delivery issue to be created
 - fedexdeliveries@vumc.org is being created to bundle any questions issues into one location
- Reserving a dock for FedEx
 - We are reserving a dock for FedEx each morning to expedite their packages to Receiving
- FedEx Delivery Times
 - Working with FedEx to have better delivery times upon email receipts to their customers.
- Addresses for specific locations
 - We are working with FedEx to move packages specific for Research to the sub basement of MCN to ensure separation of Clinical areas for faster processing and delivery.

Next Research Town Hall: June 20, 2024



Questions?