

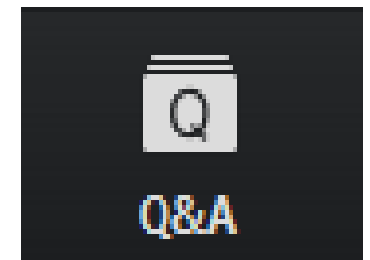
Welcome to the IRP Hypercare Support Sessions for Grants

We will begin shortly - please note:

- We have **muted your audio and turned off your camera** to ensure higher quality sound during the session. **Please ensure your audio and camera remain off** throughout the entire presentation.
- If you have a technical issue during the session, please use the **chat** feature.
- We will **answer questions throughout the session** as time allows.

★ To ask questions...

- Click on the Q&A icon at the bottom of your screen in Zoom
- Type in your questions and view questions from colleagues
- Upvote your colleagues' questions by pressing the "thumbs up" next to the question



INTEGRATED RENEWAL PROGRAM

Hypercare Support Sessions for Grants

Allison Kim - IRP Finance Grants Lead

Marko Coric - IRP Finance Analyst, Grants SME

Matthew Degraaf - IRP Business Analyst

Krisch Pelington - Manager, Research Accounts Receivable

Evelyn Miguel (Panelist) - Associate Director, Research Finance

Claudia Ramos (Panelist) - Research Project Analyst, Research Services

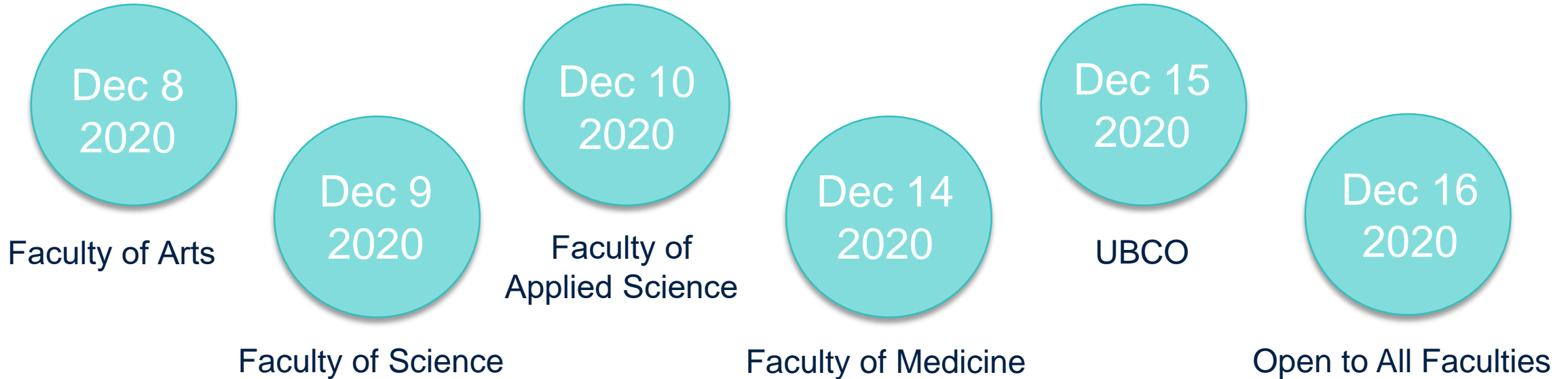


December 8~16, 2020

LAND ACKNOWLEDGEMENT

We acknowledge that UBC's two main campuses are located on the traditional, ancestral and unceded territories of the [x^wməθk^wəy'əm](#) (Musqueam) and [Syilx](#) (Okanagan) peoples, and that UBC's activities take place on Indigenous lands throughout British Columbia and beyond.

WHO HAS BEEN INVITED TO THIS SESSION?



Who are invited?

- Finance employees supporting PI's, i.e., people with the following security roles:
 - Grant Financial Analyst
 - Cost Center Financial Analyst
 - Cost Center Payroll Financial Analyst
 - Grants Manager (Staff only, not Faculty)
- Finance Directors and Transition Network



INTRODUCTIONS



Allison Kim

IRP Finance Grants Lead



Marko Coric

IRP Finance Analyst, Grants SME



Matthew Degraaf

IRP Business Analyst



Krisch Pelingon

Manager, Research Accounts Receivable



Evelyn Miguel

Associate Director, Research Finance



Claudia Ramos

Research Project Analyst,
Research Services



TODAY'S DISCUSSION

Purpose

- Address common grants related Q&As identified after go-live
- Provide best practices and guidance
- Open Q&As.

Key themes identified:

1. General Q&As
2. Research Grants Dashboard Reports
3. Grants related Security Roles
4. Grants vs. Award Recap



GENERAL Q&AS

Q Who to contact for changes to Grants' Cost Center, Award and/or Grant?

- Cost Center changes: contact the **Research Officer** assigned to the grant
- Activity additions or changes: use the Workday FDM request framework
- Closing award and/or grant: contact the **Research Finance Officer** assigned to the grant

A

Q Who can perform an interfund transfer for Grants in Workday?

All interfund transfer with grant Worktags **must** go through Research Services.
Contact the **Research Officer** assigned to the grant

A

Q Were all legacy FMS grant related Program codes converted into Workday?

Some legacy grant related FMS program codes were converted into activity Worktags, **without** financial data, and activity codes **do not** contain speedcharts

A



WORKTAG REQUEST PROCESS

 Uses Workday Request Framework

- Create Cost Centre
- Create Program
- Create Gift
- Create Gift Initiative

Create Project } Includes projects that are non-NAV related

Create Other Worktag } Catch all e.g. for general Finance worktags

Modify Worktag } For all worktag changes with the exception of those that are outside of this process

 Does not use Workday Request Framework

Grant Worktag } Separate request process via Research Office/RISe

NAV Project Worktag } Separate request process via Infrastructure Development/NAV

Supervisory Org

Location } Use ServiceNow for request

Academic Unit



RESEARCH GRANTS DASHBOARD REPORTS

Common Q&As

- How can PIs with multiple roles navigate the *Research Grants Dashboard*
- ***Positions Being Paid From Grants***: visibility based on user's assignment to the SupOrg Structure
- UBC Payroll Accounting Validation Errors by Organization is useful for Cost Center Payroll Analyst


Demos:

- ***Research Grants Dashboard*** Navigation
- ***Grants Ledger Summary*** Report
- ***View Spend Restriction*** report
- ***UBC Payroll Accounting Validation Errors by Organization*** Report



Get Help UBC's Self-Service Portal

Working Together with Workday
Thank you message from Santa J. Ono


















[View More](#)

Inbox 2 items

Expense Report: EXP-0000013367, Joerg Gsponer on 30-Nov-2020 for \$399.99
1 day(s) ago - Effective 2020-11-30

Spend Authorization: SA-0000000008, Leonard Foster on 16-Nov-2020 for 87.78 CAD
14 day(s) ago

[Go to Inbox](#)

 Personal Information	 Processes Awaiting Me	 My Team Management	 Team Absence
 Absence	 My Team	 Benefits	 Recruiting
 My Recent Purchase Orders	 Time	 Team Time	 Career
 Favorites	 Research Grants Dashboard	 Requests	 Academic Dashboard

Please note that we are editing the videos containing the demonstration of the reports, and will be providing them later



SECURITY / ACCESS REQUESTS

Grant Financial Analyst = view only

Grant Manager = approval + access to payroll details

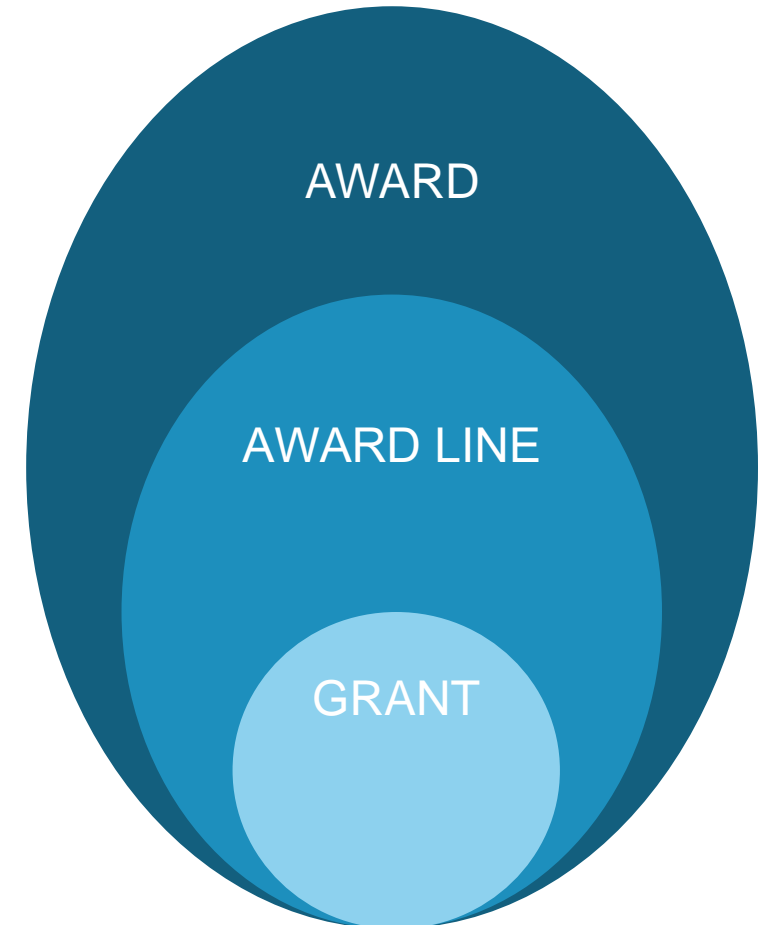
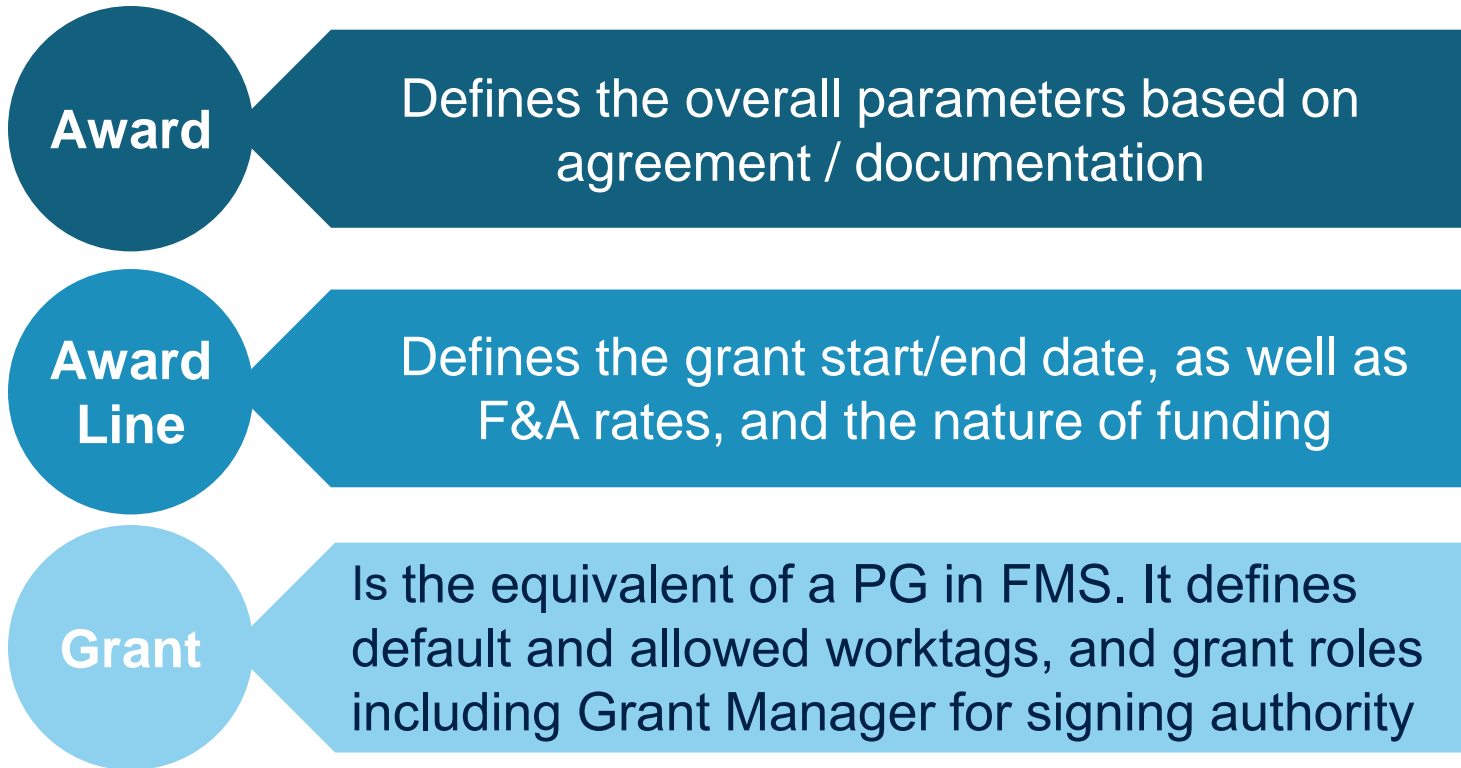
For security / access requests, have a conversation with your supervisor to determine what access you require:

- **If you require Grant(s) specific access** (i.e., Worktag in Workday is for Grant(s)):
 - Contact PI or Admin PI to add relevant **access** ([job aid](#));
 - If the PI / Admin PI cannot add relevant access, submit a ServiceNow ticket and attach approval from PI / Admin PI approving relevant **access** to the specific Grant ID
- **If you require Cost Center (CC) wide access, or access to a Worktag that is not Grant(s)**
 - Contact the Department Administrator of the CC or the CC Manager who will work with your faculty's Finance Director to add your request to a batch load to Workday. Please also clarify if visibility into payroll details is needed.



GRANT VS AWARD RECAP

The basic form of an award in Workday consists of:



Note: Transactions consider a combination of data from award line and grant. Each award line is linked to only one grant, so in this context, **award lines = grant**



GRANT VS AWARD RECAP: AWARD LEVEL

ID Naming Convention

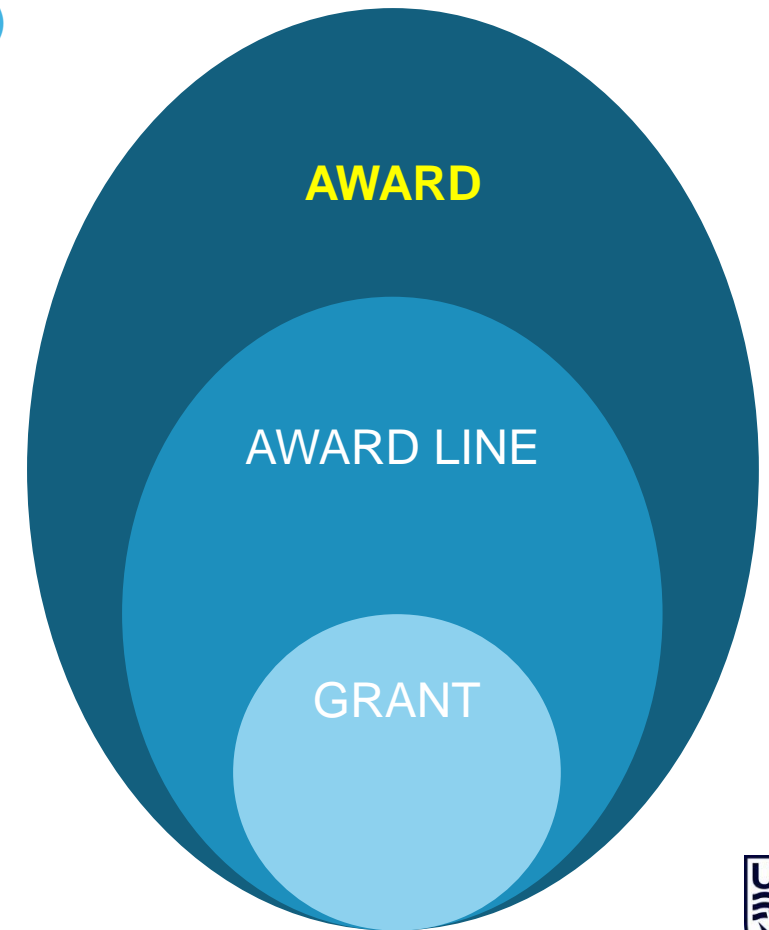
Always start with **AWD**

Followed by “-” and 6 digits
(sequentially generated by RISE)

Example: AWD-000001

Awards Define:

- Overall Award Schedule based on the agreement-all award line start and end date must be encapsulated by the award schedule start and end date
 - **Start Date:** Equal to the contract start date unless there is a sponsor agreed pre-spending date
 - **Contract Start Date:** start date according to the agreement
 - **Contract End Date:** end date according to the agreement
 - **End Date:** Equal to the contract end date unless there are no-cost extensions
- **Budget:** budgets are defined at grant level
- **Sponsor:** all award lines within the award will have the same sponsor
- **Overall Funding Details:** total awarded by the sponsor per the agreement



GRANT VS AWARD RECAP: AWARD LINE LEVEL

Award Lines Define:

- F&A Rate Agreement (indirect cost of research) - Rates used are automatically calculated when an expense is posted

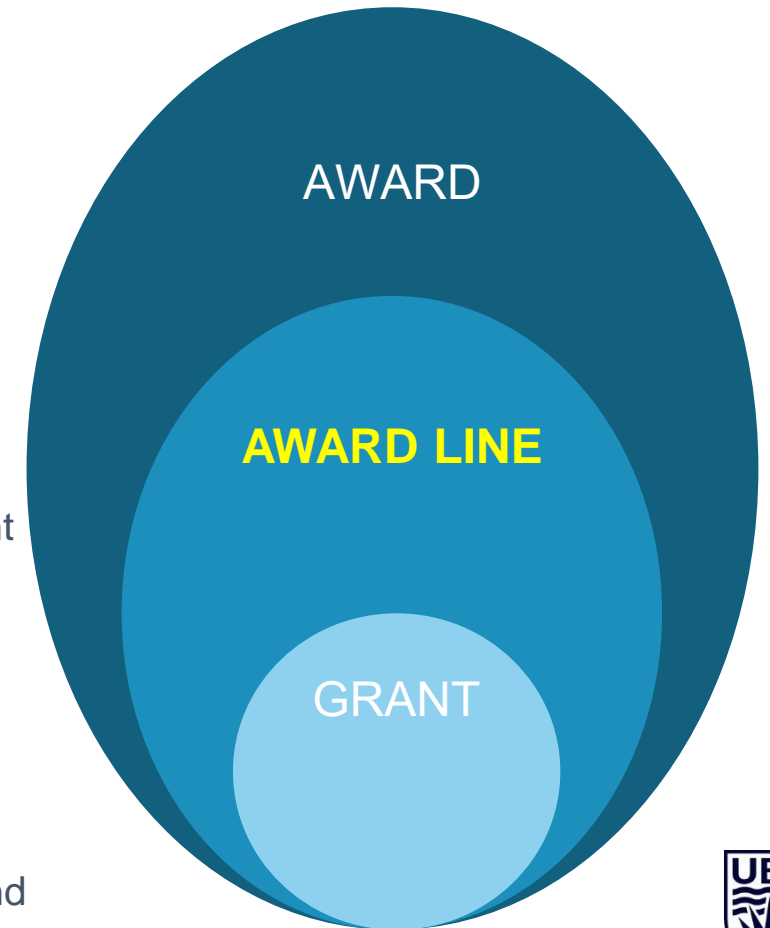
Award Line (and essentially Grant) start and end date

- used in **custom validation** of expenses
- Costing allocation **has to be** within the start and end date of the Award line
- Costing allocation **has to have** an end date

Billing Considerations: Cost Recovery vs Cost Reimbursement

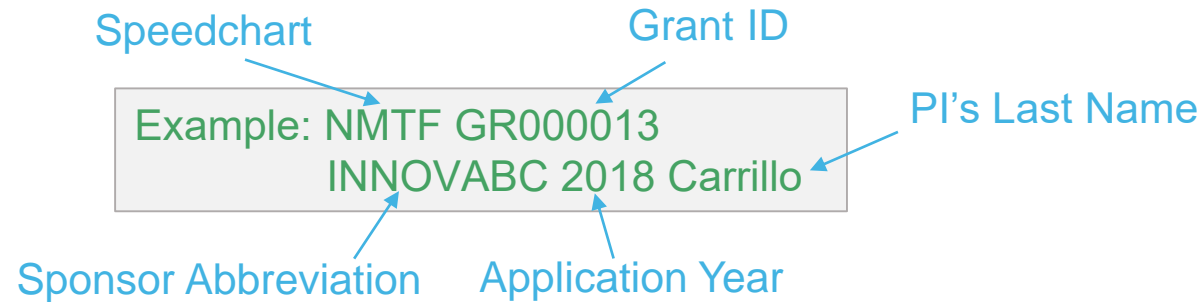
- **Cost Recovery** refers to payments not related to the sponsor's funding agreement for the grant (ie: not from the sponsor) – these do not require an invoice to be raised in WD
- **Cost Reimbursement** refers to funds received from the sponsor per award agreement stipulating invoicing to the sponsor by costs incurred for specific periods

For more information related to depositing grants revenues, grants-cost recovery, and non-grant funds, please refer to the established guidelines in the Research Finance website: <https://finance.research.ubc.ca/policies-guidelines/guidelines>



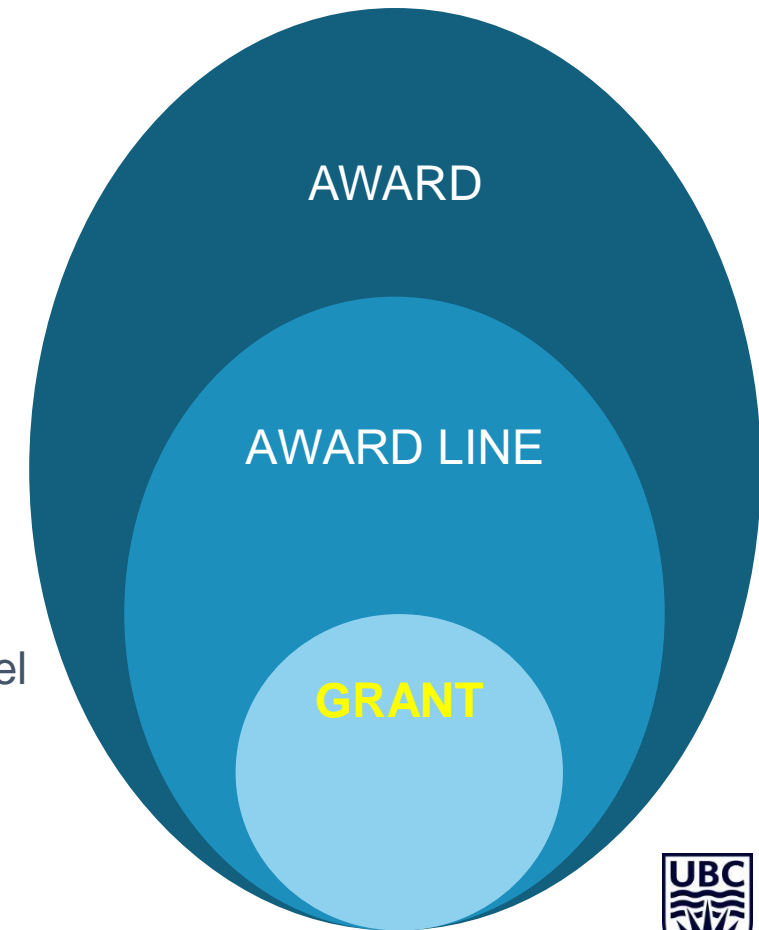
GRANT VS AWARD RECAP: GRANT LEVEL

Grant Naming Convention (5 elements)



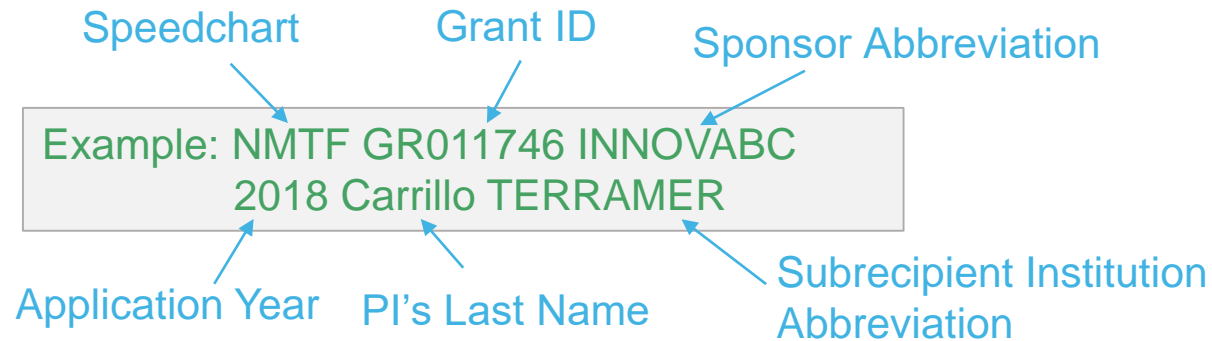
Grants Define:

- Fund (default and allowed)
 - Function (default and allowed)
 - Cost Centre (default and allowed)
 - Activities (allowed but **no default**)
- Costing allocation should be done at the grant level, not at the cost center level
- **Default** means these populate automatically when you enter the grant in any transaction field requirement
 - **Allowed** means you are able to use this when to replace or to add the worktag)
- Grant Roles:
 - **Grant Manager** = the signing authority
 - **Research Finance Officer** = your main research finance contact
 - **Research Officer** = your ORS/UILO contact



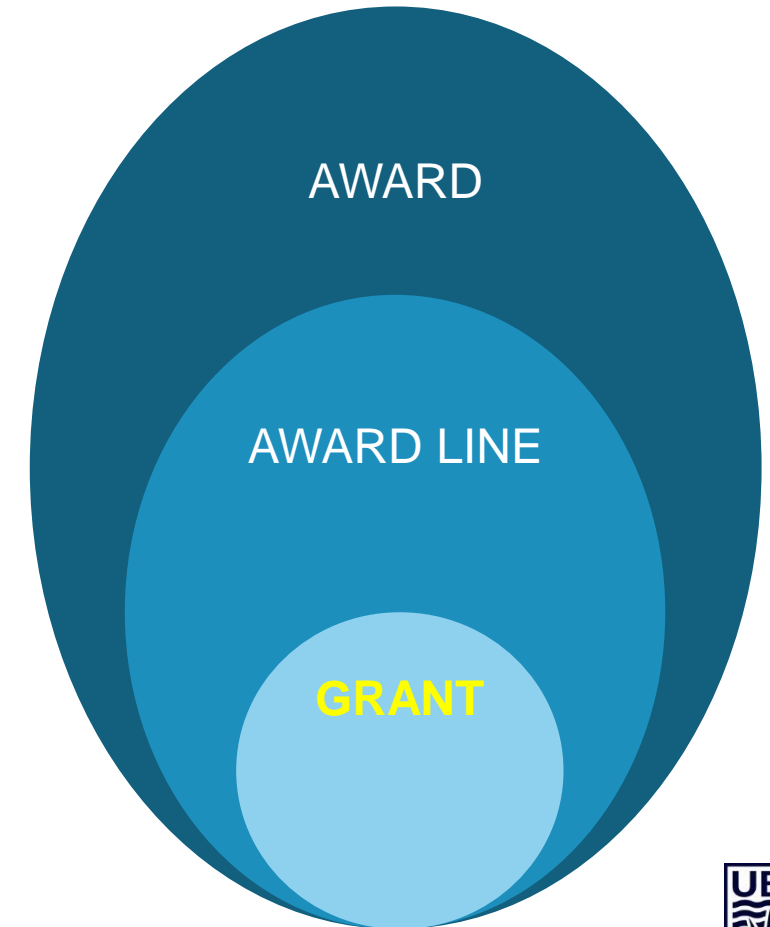
GRANT VS AWARD RECAP: SUBRECIPIENTS

Subrecipient Naming Convention:



Subrecipient Notes:

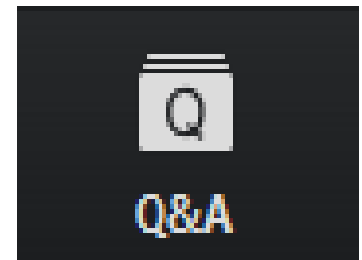
- Subrecipients grants are only required to be created if there is reporting involved with the sponsor to report the specific expenses reported back by the subrecipient institution. (ie: Tri-Agency)
- No costing allocations should be directed to subrecipient grants as these are paid to external institutions, and reported subsequently back to UBC at year end
- Transactions should NOT be posted on subrecipient grant unless it is for Grant Subaward External, which requires specific instruction from UILO/ORS upon signing of the agreement with the external institution



QUESTIONS & ANSWERS

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Key Grants Links

- [Link](#) to IRP Researcher Events
- [Link](#) to Job Aid on Initiate Adding Additional Signing Authority
- [Link](#) to Job Aid on FDM Change Request Framework
- [Link](#) to Job Aid on Research Grants Dashboard: Custom Reports
- [Link](#) to Research Finance Guidelines



CONTACT

The Integrated Renewal Program would love to hear from you! If you have any questions or comments please get in touch.

WEBSITE



irp.ubc.ca
isc.ubc.ca

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SERVICE NOW**



<https://ubc.service-now.com/selfservice>

