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Effort Certification and Grants Reporting in Workday

Nov 15, 2018

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Effort Certification Overview

- Population:
  - Federal/Federal Flow-Thru
  - Federal/Federal Flow-Thru Cost Share
- *Two* future state effort certification business processes:
  - Effort certification for salaried employees
  - Effort certification for hourly employees
- SPA will kick off effort certification run in alignment with applicable certification periods

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Effort Certification: Current vs. Future

Current

- Use of KFS and paper EASE forms
- EASE forms are printed, distributed, signed, and returned
- Corrections are written on EASE forms, returned to SPA to be reprocessed
- All employees are required to certify at least once annually, regardless of funding sources

Future

- Initiated through the Effort Certification business process in Workday
- Approvals routed directly in the system, eliminating any paper forms
- A smaller subset of the population will be required to certify effort
- System tracking of effort reports will automate processes for monitoring and follow up

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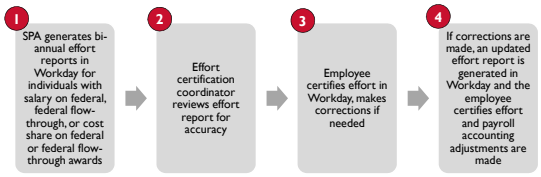
Effort Certification: Salaried Employees (Bi-Annual)



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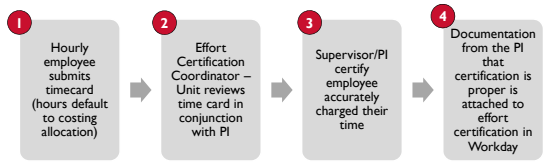
Effort Certification: Hourly Employees (Monthly)



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Effort Certification Benefits Summary

1. Reduced population required to certify effort
2. Reduction in administrative effort in distributing and collecting forms
3. Process is entirely electronic, reduction in physical storage
4. Improved reporting to facilitate proactive management of costing allocations in advance of effort certification run

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EFFORT CERTIFICATION DEMO

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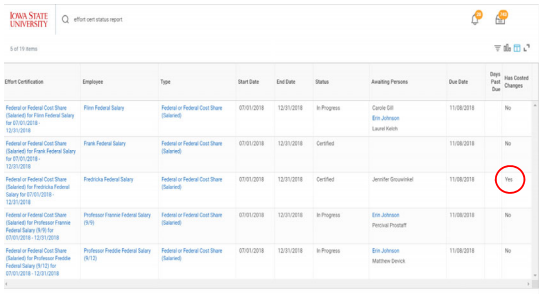
Effort Certification Status Report



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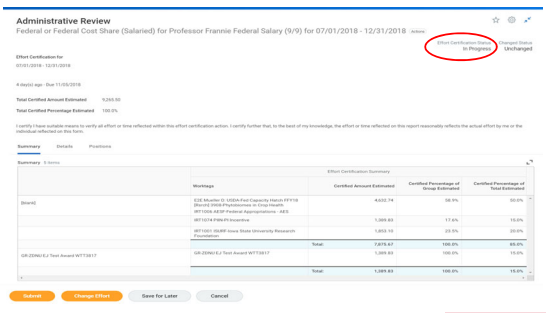
Inbox of Effort Certification Coordinator



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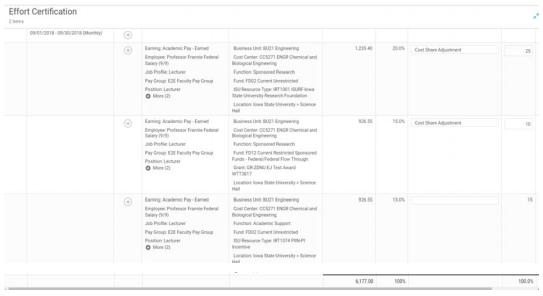
Changing Effort for Salaried Worker



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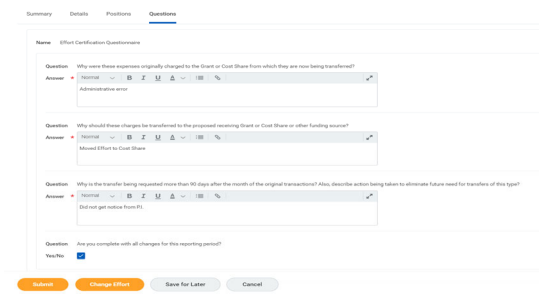
Effort Certification Change Questionnaire



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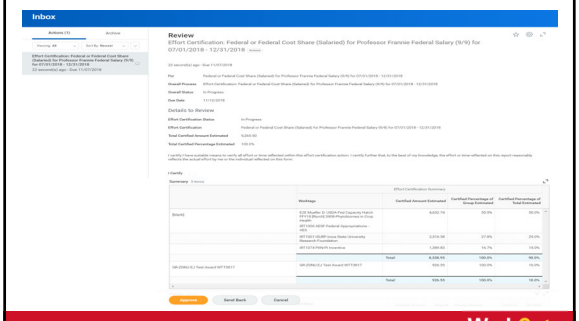
Worker Reviews Effort



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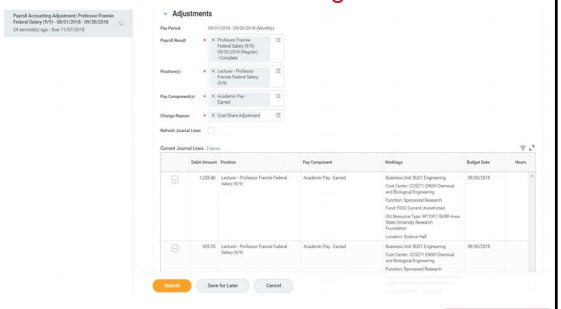
Retroactive Payroll Accounting Adjustment from Effort Certification Change



Retroactive Effort Adjustment after Effort Certification has been completed

- If Effort needs to be changed after Effort Certification process has completed:
  1. Effort Certification Coordinator contacts SPA Manager
  2. SPA Manager reruns Effort Certification for specific person
  3. Effort Certification Coordinator changes effort
  4. Worker re-approves
  5. Retroactive Payroll Accounting Adjustment is processed
- Normally involves moving payroll off a Grant

GRANTS MANAGEMENT REPORTING

Grants Management Reporting Overview

- Approach:
  - Evaluating the needs of the various stakeholders
- Grants Dashboards:
  - PIs, Grant Coordinators, SPA Accountants
  - Provides short cut to personalized information
- Other reports in process to support Effort Certification and Grants
- Reports: Portfolio of Awards, Awards Expiring in 90 days, SPA Financial Reports

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Grants Management Reporting: Current vs. Future

Current

- eData provided reports
- Information updated after nightly posting run
- Separate system to learn
- Not customizable without help from report writers

Future

- Workday provided reports
- Uses Workday security model for report viewers
- Real-time
- Able to drill into transactional details
- Can combine charts, graphs, tables, and key performance indicators (KPIs)
- Can join reports with transactions for better decision-making

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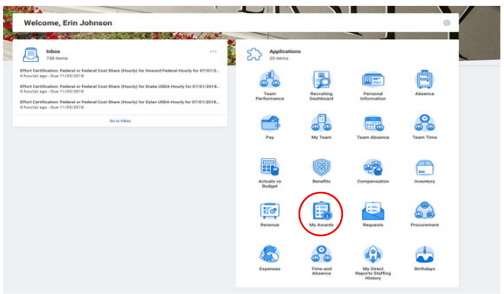
Dashboard



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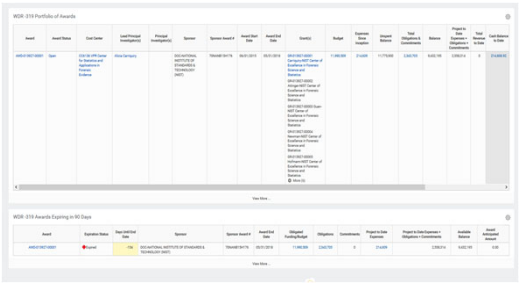
Dashboard



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Portfolio of Awards

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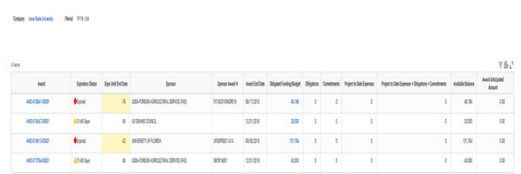
Awards Expiring in 90 Days



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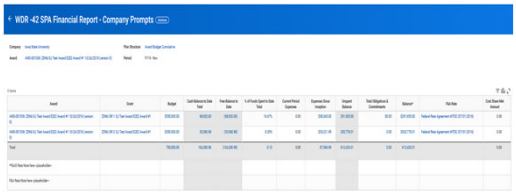
SPA Financial Report



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Grants Terminology Cydewalk (Partial)

Right now we call it…	In Workday we call it…
Account Number	Grant/Gift/Program/Project
Class Codes/Object Code	Spend categories/revenue categories/ledger accounts
Electronic Personnel Action	Costing allocation
Labor Cost Transfer	Payroll accounting adjustment
Sponsored Programs Account	Grant
Sponsored Programs Account Number	Grant Worktag
Award Status	Award Lifecycle Status/ Award Line Lifecycle Status
Cost Transfer	Accounting Adjustment
Organization Code	Cost Center

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Want More WorkCyte Program Information?

- WorkCyte Website:
  - Full Grants Cydewalk will be posted in the coming weeks!
  - Up-to-date information on the project
  - Training updates
  - And so much more!

https://www.workcyte.iastate.edu/

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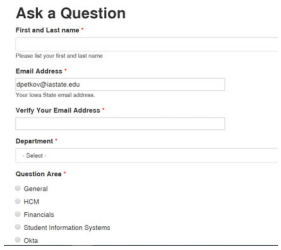
Submit Your Questions!

- Targeted 48-hour answer turnaround time for questions asked through the WorkCyte website here
- Ongoing tracking of questions by Change Management team


Ask a Question

First and Last name *

Please list your first and last name

Email Address *

dpetkov@iastate.edu

Your Iowa State email address.

Verify Your Email Address *

Department *

Select

Question Area *

General
HCM
Financials
Student Information Systems
Okta

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Questions?

Workcyte_change@iastate.edu

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