Workday's Approach to Grants

Several grants processes will be more effective and centralized with Workday. Below is an overview of some of the upcoming changes for grants.

What's Changing?

- **New Terminology for Grants Processes/BP** – The current process is referred to as award modification.
  - **Workday Enhancement:** Workday introduces the terminology of Award Amendment or Correction. An Amendment generates a new version of the award with effective dating, while a Correction adjusts award information with no version or effective dating. Importantly, both Amendments and Corrections have "Reason Codes" that can be used to track what kind of change has been made to the award.
  - **Impact:** This change harmonizes the language across all institutions for greater clarity, nuance, and consistency.
- **Transition from Award Modification to Award Line** – Currently, there is an award modification process.
  - **Workday Enhancement:** When amending or correcting an award in Workday, there will be a new decision point to determine if a new award line is needed. Clear guidance will be provided on when to generate a new award line, ensuring optimal workflow.
  - **Impact:** This transition affects all institutions.
- **Supplier Configuration/Process for Grants Requesting New Subrecipient** – In the legacy system, purchase orders (POs) are used.
  - **Workday Enhancement:** In Workday, supplier configuration setup will remain with the Supplier Accounts team; however, the grants team will now need to request in cases where a Supplier doesn't exist and is needed for a new Subrecipient. This can be achieved via the "Create Supplier Request" task in Workday.
  - **Impact:** This change affects all institutions.
- **Supplier Contracts with Security Decisions** - No current process in legacy system.
  - **Workday Enhancement:** Grants leads will now be able to create supplier contracts with security decisions, allowing only Subaward contract types. This change promises a more efficient and compliant process, impacting all institutions.
- **Subawards** – No current process in legacy system
  - **Workday Enhancement:** Users will have the ability to create supplier invoices for subawards without a requisition request or purchase order.
  - **Impact:** This change will streamline the process for all institutions.
- **Financial Work Study** – The grants team currently does not have awards set up for Financial Work Study (FWS) purposes.
  - **Workday Enhancement:** Financial Work Study and Financial Aid will now be managed within the Grants module in Workday and set up by the grants team. The grants team will be responsible for setting up awards to perform Letter of Credit Drawdowns and establish costing allocation for FWS. Costing allocations will be handled by payroll accounting.
  - **Impact:** This change affects all institutions.
- **Handling of Internal Research Center Awards** – Currently, UBalt has departments

that manage internal awards for their Research Centers

- **Workday Enhancement:** In Workday, internal awards for research centers will be handled through the grant's functionality as an internal "grant" item. This feature allows for document storage and facilitates departmental fund transfers, marking a significant improvement to the process. Training on the new process will be provided to ensure a smooth transition.
- **Title 3** – Only CSU, BSU, and UBalt are eligible for Title 3.
  - **Workday Enhancement:** The approval process for Title 3, currently conducted via email, will now be seamlessly handled within Workday. Explanations about Title 3 will be detailed in the set-up job aid.

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