

Create Gift Request Overview

This Quick Reference Guide (QRG) is designed to walk **Unit Gift Managers** through the steps to create a new Gift request and how to view a sent back reason in Workday. The Create Custom Gift process to create a new Gift worktag **should only** be initiated once funds have been received by the University. By the end of this QRG, users will be able to populate and submit the **Create New Gift** form to create a Gift request in Workday.

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On the Workday **Home** screen:


1. Enter **Create Custom Gift** in the search field.
2. Select the **Create Custom Gift** task from the Search Results.



On the **Welcome to the Gift Hub!** screen:

3. Click the **Create Gift** button.

On the **Create New Gift** screen:

 <p>NOTE</p>	<p>The following special characters “<” or “>” are not allowed in these open text fields: <i>Gift Name, Gift Alternate Name, and Restriction Description</i>. You will receive an error in Workday to remove these characters.</p>
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Under the **Enter Gift Details** section:

4. Complete the following fields:
 - **Gift Type (required)** – select the appropriate Gift Type from the following list:
 - *Non-Pooled Classification:*
 - **True Endowment:** Funds received from a Donor with the stipulation that the principal remain intact and be invested in perpetuity to produce income that is to be expended for purposes specified by the Donor.

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- **Quasi Endowment:** Fund designated to function like an Endowment, but which may be expended at the discretion of the entity's governing board.
- **Term Endowment:** Funds where the Donor has indicated that the principal can only be expended after a stated period or upon the occurrence of a specific event.
- **Internal Transfer from Existing Endowment Income:** Gift set up to segregate existing Endowment income.
- **Annuity and Life Income:** Gift given by a Donor to establish a legal entity (trust) with certain conditions. When the trust terminates, the remaining assets are directed to charitable purposes of the University.
- **Trustee Held Endowments:** Endowments held by an outside trustee for the benefit of the University.
- **Capital Building and Equipment Gift:** Gift given by a Donor to build or renovate a physical facility or for capital equipment.
- **Spendable Classification:**
 - **Donor Gift – Restricted:** Gift given by a Donor with a restricted purpose(s).
 - **Donor Gift – Unrestricted:** Gift given by a Donor for unrestricted purpose(s).
 - **Foundation Transfer – Endowment Income:** Gift set up to receive Foundation held Endowment income.
 - **Foundation Transfer – Gift:** Gift set up to receive Donor Gifts received at a Foundation.
 - **Internal Transfer from Existing Gift:** Gift set up to segregate existing Gift funds already received by the University.
 - **Internal Transfer – Other:** Gift set up to receive other types of Gift funds (i.e., Endowment admin fees).
 - **Other:** Other types of Gift funds.
 - **Agency:** Assets held on behalf of an outside entity.
- **Gift Name (required)** – enter the Gift Name using the appropriate naming convention for the Gift. (*Gift Type Prefix-MBU-Unit defined Short Name*)
 Unit defined short name example: TE-AS-DEAN Burger Prof CHEM
 - TE = Workday Gift Type prefix (True Endowment)
 - AS = MBU (Arts and Sciences)
 - “DEAN Burger Prof Chem” = The Unit-Defined Short Name

Use the table below to determine the Workday Gift Type prefix:

Prefix	Workday Gift Type
TE	True Endowment
QE	Quasi Endowment
TM	Term Endowment
DR	Donor Gift – Restricted
DU	Donor Gift – Unrestricted
FE	Foundation Transfer – Endowment Income
FG	Foundation Transfer – Gift
IG	Internal Transfer from Existing Gift
IE	Internal Transfer from Existing Endowment Income
EF	Internal Transfer - Other
AG	Agency
AL	Annuity and Life Income
CG	Capital Building and Equipment
TH	Trustee Held Endowment
OT	Other

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- **Gift Alternate Name (required)** – enter the appropriate Gift Alternate Name (long name). Use the legal name provided in the Gift Agreement by the Donor if available.
Long name example: *Burger, Albert Professorship in Biological and Medicinal Chemistry.*
- **Amount of Funds (required)** – enter the amount received or pledged by the Donor.
 - **Spendable** – amount in hand
 - **Endowed** – amount pledged
- **Check box if Gift will have University Matching (required)** – Check box only if matched by the University of Virginia.
- **Date Gift Established (required)** – this will auto-populate to the current date or use the Donor Documentation to enter the appropriate date of establishment for the Gift.
- **Plan of Action for Quasi Endowment (conditional)**– If you selected Quasi Endowment as the Gift Type, enter a Plan of Action, and use the “Upload Documents” section to attach required documents.

Under the **Enter Gift Purpose and Origin** section:

5. Select the (>) icon next to the **Enter Gift Purpose and Origin** to expand the section.
6. Complete the following fields:
 - **Gift Primary Purpose (required)** - select the appropriate Gift Primary Purpose from the following list. This information is usually found in the Gift documentation.
 - **True Endowment:** Funds received from a Donor with the stipulation that the principal remain intact and be invested in perpetuity to produce income that is to be expended for purposes specified by the Donor.
 - **Annuity and Life Income:** Gift is placed in a trust from which the beneficiary either receives a fixed percentage of the fair market value of its assets or is paid in installments for the rest of his or her life.
 - **Capital Projects:** A Gift that will be used for construction expenditures or for the acquisition of University property.
 - **Fellowship – General:** A Gift that awards scholarships to graduate students without Donor restriction.
 - **Fellowship – Specific:** A Gift that awards scholarships to graduate students with Donor restriction.
 - **Hospital:** A Gift that supports the patient care operations of the University Medical Center.
 - **Journal:** A Gift used for journal publications
 - **Lecture:** A named endowed fund to provide a lecture program for a school, department, or program.
 - **Loans:** A Gift that creates a student loan program.
 - **Operational:** A Gift given for operational uses (instruction, administration, libraries, student services, institutional support, etc.).
 - **Prize and Premium:** A Gift that is given to establish an award or prize fund.
 - **Professorship:** Endowed chairs established by private Donors.
 - **Research:** A Gift that supports the general research activities of the University.
 - **Research – Restricted:** A Gift that supports specific research activities of the University.
 - **Scholarship – General:** A Gift that awards scholarships to undergraduate students without Donor restriction.
 - **Scholarship – Merit Based:** A Gift that awards scholarships only to students based on merit.
 - **Scholarship – Need Based:** A Gift that awards scholarships only to students with a financial need.
 - **Scholarship – Specific:** A Gift that awards scholarships to undergraduate students with Donor restriction (not need or merit based).
 - **Student Support:** A Gift given for the primary purpose of contributing to the students' wellbeing and overall development.
 - **Unrestricted – Dean:** A Gift given for unrestricted use by the Dean.
 - **Unrestricted – Department:** A Gift given for unrestricted use by the Department.

*** Please note there may be other Purposes added on an ad hoc basis that are not defined here*
 - **Alternate Purpose (optional)** – If the Donor has indicated more than one purpose, indicate an Alternate Purpose (see same list of values for Primary Purpose above).

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- **Default Function (required)** – select the appropriate Default Function Worktag.
- **Allowed Function (conditional)** – select the appropriate Allowed Function Worktag(s). If you select Allowed Functions, the Default Function must also be included.
If you complete this field, only the functions listed are available for use during transactions when the gift is selected.
- **Origination (required)** – select the appropriate source of Origination.
- **Gift Hierarchy (required)** – select the appropriate Gift Hierarchy. The drop-down list will only allow you to select from existing Level 1 Hierarchies. If needed, new Gift Hierarchies should be requested prior to submitting this form.
- **Check box for Alternate Routing for Approval (conditional)** – select this check box if the Gift's approvals should always route to the Cost Center Manager or P2P Approver rather than the Unit Gift Manager. If the initiator is a Unit Gift Manager *and* P2P Approver, the alternate approver will be the Senior Department Finance Approver. If this box is selected, the Gift will be placed in an Alternate Hierarchy after creation.



NOTE

Once your gift request is approved, you can identify if the gift worktag (when used in transactions) will follow alternate routing for approval. To do this:

1. Search for the **gift worktag** (e.g., GF000001) in the Workday **Search** bar to display the gift details.
2. Check the “Included In” field. If it lists GFHA0001 Allocated Gifts- Alternate Hierarchy, then it will alternate route. If it is not listed, but should be, send your requested update to AskFinance@virginia.edu.
3. You can also view the hierarchies of multiple Gifts at once by using **the FDM Reference - Gift** report. If the *Allocated Gifts – Alternate Hierarchy* column is blank, the Gift is not going to an Alternate Route.

The Alternate Hierarchy is a separate hierarchy than the MBU-specific one used upon creation of your Gift. You will typically see one to two other Gift Hierarchies under the “Included In” field when viewing your Gift in Workday.

- **Restriction Description (required)** – enter a **detailed description** of the restrictions attributed to this Gift (e.g., “Gift can or cannot be used for...”).



CAUTION

If your restriction description is brief and not detailed, it will be sent back to you from the approver to revise. Please ensure you are as detailed as possible and capturing the restriction fully from your documentation.

- **Unit Gift Manager (required)**– will auto-populate based on the initiator of the task (i.e., defaults to your name as the initiator). You can change this by searching for the name of a different Unit Gift Manager. The Unit Gift Manager assigned should be the person at the university expected to approve transactions related to this Gift.
- **Responsible Org (required)** – select the appropriate Cost Center Worktag based on who will be receiving/managing the funds.

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- **Would you want the Cost Center to default when the Gift is used in Workday? (required)** – Select Yes or No.
 - If yes, the cost center designated as the Responsible Org will default when the gift is used during transactions entered into Workday. The cost center will need to be reviewed and updated if needed.
 - If no, the cost center will not default when the gift is used during transactions in Workday. The cost center will need to be specifically entered by the individual processing the transaction.
- **Should Gift be allowed for scholarship/fellowship expenses through SIS? (required)** – Select Yes or No. If yes, the gift will be allowed for use within the Student Information System (SIS).

Under the **Accept Terms & Conditions** section:

7. Select the (>) icon next to the **Accept Terms & Conditions** to expand the section.
8. Select the **check box** under the attestation statement to certify that you have read and complied with the University’s Gift Policy.

Under the **Upload Documents** section:

9. Select the (>) icon next to the **Upload Documents** to expand the section.
10. Select the **Upload** button under the Upload Documents section to drag and drop the supporting Donor documentation.
 - If Gift is **Spendable**, upload proof of Gift and donor restrictions.
 - If Gift Type is **True Endowment** (required)– upload fully executed True Endowment Gift Agreement
 - If Gift Type is **Quasi** (required) – upload letter to Augie Maurelli, Associated VP of Financial Operations, and other related documentation.

 <p>NOTE</p>	<p>You are required to attach at least one Donor documentation or related information attachment when submitting the Create Custom Gift form.</p> <p>Attachments can only be submitted in Word or PDF format, or you will receive an alert. Only one form of documentation can be attached to every “Upload” button in the Create Custom Gift form.</p> <p>True Endowment Gift Types have their own document upload button.</p>
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11. Enter any additional information about your gift request in the **Additional Comments** field, as needed. This field is an optional, free form text box and can be left blank.



12. Click **OK** to submit the request.

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If Donor Endowed Funds are held at the Foundation and are SIF matching, the initiator must submit two separate “Create Custom Gift” requests:

1. Submit True Endowment Gift request for SIF matching Funds
2. Submit Spendable Gift request needed for Transfer of Foundation income



Once the Gift is routed for approval and created in Workday, you (as the initiator) will receive a notification.




The gift details (listed below) in the notification will allow you to easily search and navigate to your Gift in Workday:

1. Gift ID (can copy and paste into the Workday search bar to find the Gift)
2. Gift Name (can copy and paste into the Workday search bar to find the Gift)
3. Cost Center
4. Default Fund
5. Allowed Funds (if applicable)
6. Company

The screenshot shows a notification interface with a blue header 'Notifications'. On the left, there are filters for 'Viewing: All', 'Sort By: Newest', and 'From Last 30 Days'. Below these are two notification items: 'Document Available' (ER-0000011104.pdf is now available in My Reports, 48 minute(s) ago) and 'Create Custom Gift: DU-FI-Sample Gift' ([Extend Gift App] - Gift Creation Complete - DU-FI-Sample Gift - GF345987, 1 day(s) ago). On the right, the details for the selected notification are shown: 'Create Custom Gift: DU-FI-Sample Gift', '1 day(s) ago', 'A new custom gift has been created.', and a list of metadata: Gift ID: GF345987, Gift Name: DU-FI-Sample Gift, Cost Center: CC0498 FI-VP Finance, Default Fund: FD002, Allowed Fund(s): [], Company: UVA_207. At the bottom right, there are links for 'Details' and 'Create Custom Gift: DU-FI-Sample Gift'.



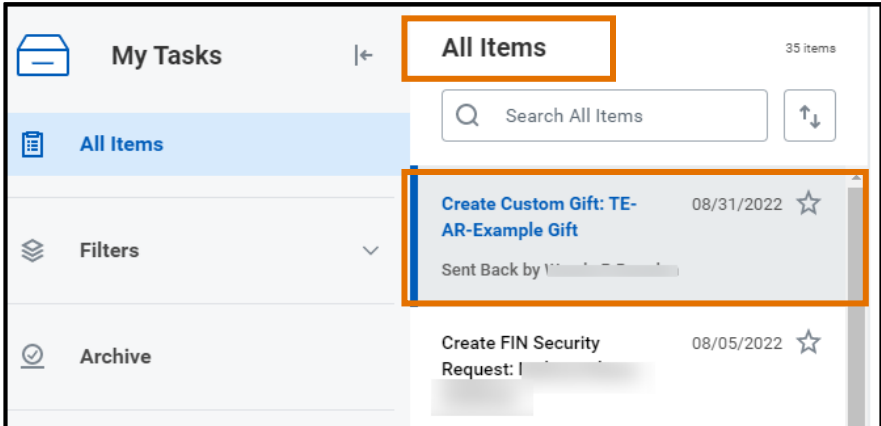
Procedure: View Send Back Reason For Custom Gift Request

If an approver requests you to make changes to your Custom Gift Request, they will send back the task for you to update. You will receive this as a notification in Workday that you can select to view further details including the sent back reason. You can also navigate to your Workday inbox where you can find your sent back custom gift request and view the reason it was sent back from the approver.

 <p>NOTE</p>	<p>If you are an approver for gift requests, remember to approve transactions in a timely fashion. To view all tasks that you need to review or approve, you can run the report “Processes Awaiting My Action.” The report shows what tasks you need to act on and how many days it has been since initiation.</p>
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On the Workday **Home** screen:

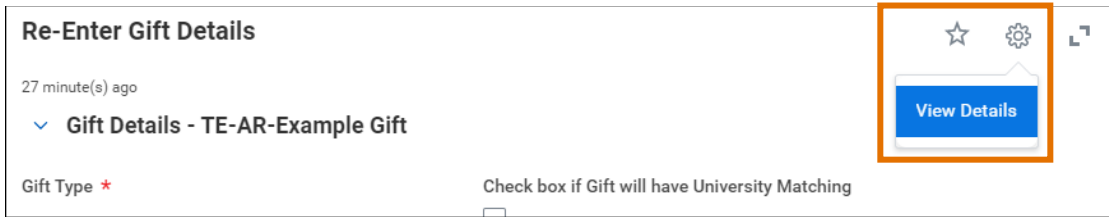
1. Do *one* of the following:

Go to the...	Then...
<p>Notifications icon</p> 	<ol style="list-style-type: none"> a) Click the notifications icon (located on the upper right-hand corner of the screen). b) Select the sent back Create Custom Gift notification. The message will indicate the approver and the Send Back Reason.
<p>Workday Inbox</p> 	<ol style="list-style-type: none"> a) Click your Workday Inbox (located on the upper right-hand corner of the screen). b) Under All Items in your Inbox, select the custom gift request that has been sent back. Tasks that have been sent back by an approver will be indicated beneath the name of your gift request. 

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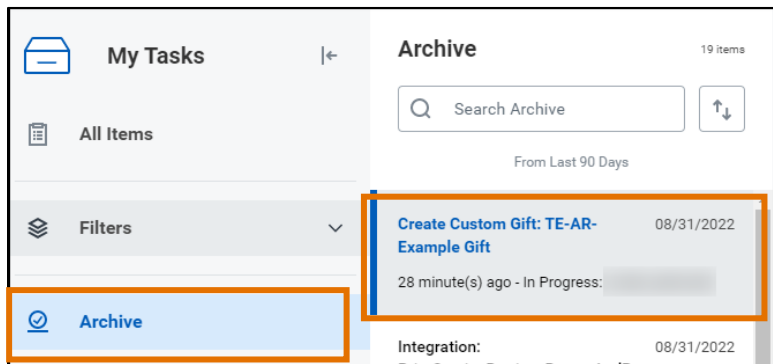
2. To see the sent back comments, do *one* of the following:

- Click the “gear” icon at the top right of the Re-Enter Gift Details screen and select **View Details**.



OR

- Select **Archive** under My Tasks and navigate to your submitted custom gift request.



On the **View Event** screen:

3. Select the **Process** tab.
4. In the **Process History** table, you will be able to see all the steps taken and awaiting action from your submitted Gift Request. Look for “Sent Back” in the **Status** column of the table to locate the step, approver, and reason your task was sent back (see the Comment column).

NOTE

You can find the reason in the **Comment** column. This will be helpful to reference as the approver can provide additional context and suggestions that you can incorporate when making changes to your custom gift request.

Status	Completed On	Due Date	Person (Up to 5)	All Persons	Comment
Step Completed	08/31/2022 05:31:57 PM		[Redacted]	1	
Sent Back	08/31/2022 05:35:33 PM	09/02/2022	[Redacted] (Investment Pool Manager_CFIN)	1	Send Back Reason f [Redacted] [Redacted]: Please update the responsible org and provide more details in the restriction description before resubmitting. Thanks