## 03/01/23 Agenda

<table>
<thead>
<tr>
<th>Topic</th>
<th>Today’s Agenda Item / Objective</th>
<th>Target Time</th>
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</table>
| Welcome                       | • Welcome/Agenda Overview  
                                | • Finance Community Engagement Strategy                                                          | 15 min      |
| Updates & Reminders           | • Expense Updates  
                                | • Online Community Sunset  
                                | • Ask Finance vs. OSP-Help                                                                 | 20 min      |
| Disbursement Strategy         | • Update from Accounts Payable                                                                  | 10 min      |
| New Payment Services/PCI Vendor | • Responsibilities shared between Central Finance & the new vendor                             | 10 min      |
| Workday Support Team          | • How the new team works to support the system & users                                           | 10 min      |
| Wrap-Up                       | • Preview of Next Meeting                                                                      | 5 min       |
Sharing the Vision: Accounts Payable

Organize
Organize – Prioritize – Solution

Train
Obtain the necessary education and training for myself and my team

Partner
Partner with our stakeholders and stay regularly engaged

Prepare
Prepare the team for a successful year
When do I Ask Finance?

- If you would ask the same question if it was a Gift or a Designated – not specific to Grants. *Ex. I’m using a Grant worktag, but I don’t know how to complete an Accounting Journal.*

- Questions about:
  - procurement transactions.
  - restricted spend categories on Supplier Invoice Requests.
  - F&A or Fringe Benefits calculation.
  - F&A Revenue Allocation Profiles (forward to Office of Budget & Planning).
  - transactions that are stuck.
  - Workday or UBI reports.
  - requests made in Workday (Request Based Access) for departmental Grant roles (Grant Manager, Grant Financial Analyst, Grant Certifier)

Askfinance@virginia.edu
When do I ask OSP?

- Anything related to Award set up in ResearchUVA PBH or Workday.
- Requests to change Award Analyst.
- Questions about:
  - Award or Grant funding or budget in Workday or ResearchUVA PBH.
  - SIS Allowed flag in Workday.
  - cost sharing, fabrication, program income grants in Workday or ResearchUVA PBH.
  - requests to change spend restrictions on a grant.
  - the allowability of costs on grants.
  - Award or Grant Start and End dates or Lifecycle statuses.
  - F&A rates on grants.
  - Sponsors assigned to Awards.
  - sub-award invoices.
  - changing the Award ID (either legacy G Award number or ResearchUVA PBH proposal/Award ID).
  - Changing Cost Centers on a grant.

Osp-help@virginia.edu
ResearchUVA Actions

Note that requests for actions taken to new or existing awards should be taken in Research UVA Powered by Huron via the Award Mod Request (AMR) activity. These include:

- Requests for rebudgeting between grants.
- Requests for early terminations.
- Requests to change the PI.