Business Managers’ Meetings

The next Business Managers’ Meeting is scheduled for Thursday, March 10, 2022, at 9:00 a.m.

If you would like to present at a future Business Manager Meeting or have suggestions for helpful content, contact Jessica Winet-Fleer. We would love to hear about best practices in your area as others could benefit as well.

Financial Planning & Budget

If you have not already done so, please submit your FY23 Capital Requests by the end of the day.

Workday Financials

Questions or Issues with Workday Financials? Contact wdfinance@slu.edu

Workday Financials Office Hours

We will be holding open office hours once a month and will answer any of your questions relating to Workday Financials (i.e. Financial Reporting, FDM, Accounting, Invoices, Purchasing, Grant Accounting, general navigation, or any other financial topics).

Below is the current scheduled date and registration link. The date and registration link are also available on the Workday home page announcements.

- Jan 13th @ 9:00am – 10:00am
  https://slu.zoom.us/meeting/register/tJArdu2urzIuEtEJE5H_hq8U_DGaqUeU97ob

Workday Financial Accounting Structure Updates

- New Job Aid
  - Student/Patient Supplier Payment Guide (Spend Category)
    - Can be found in the Workday Job Aid and Video Library
- Change Spend Category Name
  - Tuition Honoraria Related Prizes Nondiscounted (SC50218)
    - **New name**: Student Prize/Award Nondiscounted (SC50218)
    - Posts to Ledger Account **5123: Scholarships**
    - Description: Student prize/award for academic achievement/contests.
  - Trainee Participant Fees (SC50270)
    - **New name**: Grant Trainee Costs (SC50270)
    - Posts to Ledger Account **5128: Participant Support**
    - Description: Expenses associated with additional costs for trainees for grants with an official Trainee designation where the trainee is learning on an internship or related; does not include trainee stipends that would be processed via Payroll.

- New Spend Categories
  - Student Emergency Relief Fund Payments SERF (SC50299)
    - Posts to Ledger Account **5123: Scholarships**
    - Description: Payments made to students for student emergency relief.
  - Student Scholarship Payments (SC50300)
    - Posted to Ledger Account **5123: Scholarships**
    - Description: Scholarship payments made to students that are not contest winners or SERF payments.
  - Student Professional Services (SC50301)
    - Posts to Ledger Account **5107: Purchased Services**
    - Description: Payment to students for any professional service that a student may be performing for the university and are getting paid in that capacity (e.g., playing music for an event, photography). These are payments to students for services rendered that are NOT performed in their student worker capacity.
  - Grant Student Stipends (SC50302)
    - Post to Ledger Account **5107: Purchased Services**
    - Description: Payments to students, not participants, including but not limited to HRSA (one-time), NSF/REU (one-time or multiple) payments.

- Spend Category inactivated
  - Human Subject Fees (SC50269)
    - Effective 1/1/2022, use existing Spend Category Subject/Participant Fees (SC50042)

Workday Financial Reporting Updates

- New Reports
  - **Receivables Aging by Org - SLUCare**
    - This report mirrors the Receivables Aging by Org, with some additional columns for Specialty, Program, Project, Gift, Fund and Function.
o **Budget Review by Department – SLUCare**
  - Looks only at the budget or forecast for a specific cost center or group of cost centers. Used for data validation and leadership reporting of the budget data loaded into Workday.

- **Report Updates:**
  o **SLUCare Black and Red Report**
    - Added Revenue Category and Sales Item to Prompt. This allows the team to use the report to analyze at a more granular level if needed.
  o **Fund Balance – Clinical Trials**
    - Added Customer as a Drill Down option for Revenue.
  o **Reports enabled for use in Worksheets**
    - Income Statement Projection – SLUCare
    - Consolidated Trial Balance
    - Trial Balance – Detail
    - Trial Balance – Detail SLUCare
    - Income Statement Trend by Org
    - Budget vs Actuals by Org – SLUCare FY21

**Human Resources**

**2021 Year End Review**

- **Key Milestones**
  o November 30, 2021: Self-evaluations are available for all qualifying FT/PT staff who started before October 1, 2021
  o January 17, 2022: All in-progress self-evaluations will be closed and advanced to the manager rating phase
  o February 28, 2022: All 2021 Year End Reviews should be complete

- **Support & Resources**

  To assist supervisors with completing their employees’ reviews, Human Resources will be providing webinars, reference guides, updated job aids and open office hours. Please let supervisors in your units know that they can find information on these resources in the January HR Bulletin.

**Workday Learning Launching on February 7, 2022**

- Beginning early next month, SLU faculty and staff will be able to access thousands of online courses and videos as well as register for in-person courses and live webinars directly through Workday. To support this transition, Human Resources is offering a webinar for Business Managers on January 13. Please see below for additional information on this webinar and how you can register.
Changes to Contingent Workers in Workday

- In preparation of the upcoming Workday Learning go-live, Human Resources collaborated with stakeholders from across the University to modify our current Workday Contingent Worker Types. The go-live date for these changes will be Tuesday, January 18, 2022.

- While most faculty and staff will not see any changes to how they typically use Workday, there will be some notable changes for Business Managers and supervisors who sponsor Contingent Workers.

- Human Resources is committed to keep you up to date with these changes. To help with this, we will be providing updated job aids and training resources for any processes that are affected by these changes. We will also host a webinar for Business Managers on Friday, January 21, which reviews these changes. Please see below for additional information on this webinar and how you can register.

Business Manager Programming

- To kick off 2022, we are pleased to announce two new Business Manager Training sessions on upcoming changes to Workday.

Intro to Workday Learning on January 13 from 9:00 am-10:00 am

- In this class, Patrick Maloney and Jim Greathouse, HR Learning & Development will walk us through the new learning application in Workday, discuss the upcoming timeline for launch, and look at the role a business manager will play.
  - Click [here](#) to register.

Changes to Contingent Workers in Workday on January 21 from 10:00 am to 11:00 am

- Join us as Jenna Rikard (HRIS) shares with us modifications of our current Workday Contingent Worker Types. These modifications will allow for stronger reporting metrics and ensure the correct contingent worker groups receive appropriate training in Workday Learning. The go-live date for these changes will be Tuesday, January 18, 2022.
- Click [here](#) to register.

Business Manager Programming sessions provide regular opportunities for training on Workday and other professional development topics designed specifically for SLU Business Managers. These sessions will focus on four main themes: (1) Reporting; (2) Budgeting; (3) Purchasing; and (4) Human Capital Management. Information on additional sessions and registration will be announced throughout 2021 in the HR Bulletin, What’s New newsletter, Newslink, and Announcements on your Workday homepage. Please email training@slu.edu if you have any questions.

Office of Compliance & Ethics

The Saint Louis University Integrity Hotline is available as a confidential, toll-free resource for anyone with a concern regarding business, billing, and/or ethical practices in his or her department. Anonymous or self-identified reports of any nature can be made to the Integrity Hotline at **1-877-525-5669**. Additional information and FAQs regarding the Integrity Hotline can be found at the Office of University Compliance and Ethics homepage. See attached link: [https://www.slu.edu/compliance-ethics/hotline.php](https://www.slu.edu/compliance-ethics/hotline.php).