

## What's New . . .

September 2024

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### Business Managers' Meetings

The next Business Managers' Meeting is scheduled for September 18, 2024.

If you would like to present at a future Business Manager Meeting or have suggestions for helpful content, contact: [Heather Kotsybar](#). We would love to hear about best practices in your area, which may also help others.

### Central Processing Center

- FY25 PO Reminder - Please be sure to provide your suppliers with your new FY25 PO #'s so that the PO# can be included on all invoices for timely payment processing.
- Spend category reminder - When choosing a spend category for your hotel expense payment processing please use 'Lodging Domestic (or Foreign) Non-Reimbursement' on hotel requisitions and 'Lodging Domestic (or Foreign)' when reimbursing hotel expenses

### Travel

- **International Travel Reminder:** When traveling internationally, be sure to contact the Office of Risk Management & Insurance to obtain an insurance travel card needed for all international travel. [Riskmgmt@health.slu.edu](mailto:Riskmgmt@health.slu.edu)
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- **International Car Rental:** Any car rental while traveling internationally requires approval from the Office of Risk Management & Insurance *in advance of the travel* or the car rental expense may not be reimbursed. [Riskmgmt@health.slu.edu](mailto:Riskmgmt@health.slu.edu)

## Human Resources

Faculty, staff, and students must be hired and onboarded in Workday before performing any type of work on behalf of the University. In addition, they are required to satisfy all I-9 Employment Eligibility Verification requirements and deadlines which include:

- Complete Section 1 of the I-9 in Workday on or before their **Hire Date** indicated in Workday
- Complete Section 2 of the I-9 Employer Review and Verification; at the SLU Division of Human Resources in-person physical review of documentation within three business days after the Workday **Hire Date**

Following these guidelines helps offer the new faculty, staff, or student worker a positive experience which research shows has a long-term impact on engagement. At the same time, failing to follow these guidelines may result in the need to terminate the individual's employment and creates liability risk for the institution including affecting the University's good standing as a Federal contractor.

Please see the following **5 Fundamentals of Onboarding New Hires** which outlines the most important and common components of proper onboarding. Thank you for your diligence in executing these important hiring guidelines.

## Workday Financials

Questions or issues with Workday Financials? Contact [wdfinance@slu.edu](mailto:wdfinance@slu.edu)



### Workday Reminders:

A reminder to utilize **Delegation** when out of the office to ensure tasks are being approved in a timely manner. Delegation is a temporary reassignment of tasks to another user, enabling that user to perform actions on your behalf.

From your My Tasks (inbox):

\*NOTE: You will only receive this task AFTER an absence request has been approved.

1. View task for delegation.
2. Read help text within the task.
3. Enter the **Begin Date** and **End Date**.
4. Click the **Prompt** icon in the **Delegate** column to select the appropriate delegate.
5. Leave the checkmark next to **Use Default Alternate**. Can change employee name if needed.
6. In the **Do Inbox Tasks On My Behalf** column, select the appropriate value.

**Note:** If you are a people manager only **Change Job, Enter Time, Request Time Off, Request Leave of Absence, Request Return from Leave of Absence** can be delegated. If you are a Business Manager or have additional Roles, please search for other Business Processes that are relevant to your business responsibilities.

7. Select **Retain Access to Delegated Tasks in Inbox** checkbox to view and modify your inbox while delegated. You will not see anything if the box is unchecked.
8. Enter comments in the **Comments** field.
9. Click **Submit**.
10. Click **Done**. This will route to your HR Partner for approval.

**Notes:**

- If you have an old delegation sitting in your My Tasks (inbox), you can remove the task by selecting the gear icon in the left-hand corner and selecting "Skip This Task".
- If you have questions or issues with Delegations please email [hris@slu.edu](mailto:hris@slu.edu)

**New Cost Centers:**

D785 SOM Go Center - included in S68/E70

D743 Bioinformatics and Computational Biology – included in S08-2/S08/E30

**New Contract Custom Orgs:**

BIOSTL/Biogenerator

FMIG Residency Fair Registration

**New Activity Codes:**

University Orientation

Cannonball Conference

Leadership Development Program

**Workday Report Updates and Additions:**

*As a reminder, you may not have access to certain Workday Reports due to security. Please email [wdfinance@slu.edu](mailto:wdfinance@slu.edu) with any questions.*

<b>Report Name</b>	<b>Update/Description</b>	<b>Functional Area</b>
<b>CR-FIN - Find Internal Service Deliveries</b>	The report has been updated to display a breakdown of amounts when an ISD has multiple transaction lines.	This report is available to the following security groups: Accountant, Accounting Manager, Administrative Accountant, Finance Analyst, Finance Auditor, Finance Executive, Implementers, Internal Catalog Data Entry Specialist, and Internal Service Delivery Data Entry Specialist.

<p><b>CR-FIN – Report of Transactions - Org</b></p>	<p>This report has been updated with a new column: Period</p>	<p>This report is available to the following security groups:  Award Billing Specialist,  Central Finance Reporting,  Controller, Cost Center Approvers, Cost Center Financial Analyst, Cost Center Manager, D028 Org Membership, Finance Auditor, Finance Executive, Finance Organization Administrator, Functional Financial Analyst, Fund 32 Grant Manager, Fund Financial Analyst, Fund Manager, Gift Financial Analyst, Gift Manager, Grant Approvers, Grant Budget Specialist, Grant Financial Analyst, Grant Manager, Implementers, Location Hierarchy Financial Analyst, Location Hierarchy Manager, Principal Investigator, Program Financial Analyst, Program Manager, Project Financial Analyst, Project Manager, Region Costing Manager, Region Financial Analyst, Specialty Financial Analyst, and University Commitment Office.</p>
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<p><b>CR – FIN – Consolidated Trial Balance</b></p>	<p>This report has been updated to include Last 72 Periods in the Time Period selections.</p>	<p>This report is available to the following security groups: Accountant, Accounting Manager, Administrative Accountant, Award Approver, Budget Amendment Approver, Budget Manager, Business Asset Accountant, Controller, Director of Sponsored Programs, Finance Analyst, Finance Auditor, Finance Executive, Grant Budget Specialist, Payroll Administrator, and Payroll Auditor.</p>
<p><b>Data Audit – Gifts and Gift Hierarchies</b></p>	<p>This report has been updated with two new columns: All Assessments Gift Hierarchy and 10000 All Gifts Hierarchy.</p>	<p>This report is available to the following security groups: Accountant, Cost Center Approvers, Finance Administrator, Finance Analyst, Finance Auditor, Finance Executive, Gift Financial Analyst, Grant Approver E40, Implementers, Investment Pool Managers, and University Commitment Office.</p>

<p><b>CR – FIN – Fund Balance</b></p>	<p>This report has been updated to include Project Group.</p>	<p>This report is available to the following security groups:  Award Billing Specialist,  Central Finance Reporting,  Controller, Cost Center  Approvers, Cost Center  Financial Analyst, Cost  Center Manager, D028 Org  Membership, Finance  Auditor, Finance Executive,  Finance Organization  Administrator, Functional  Financial Analyst, Fund 32  Grant Manager, Fund  Financial Analyst, Fund  Manager, Gift Financial  Analyst, Gift Manager, Grant  Approvers, Grant Budget  Specialist, Grant Financial  Analyst, Grant Manager,  Implementers, Location  Hierarchy Financial Analyst,  Location Hierarchy Manager,  Principal Investigator,  Program Financial Analyst,  Program Manager, Project  Financial Analyst, Project  Manager, Region Costing  Manager, Region Financial  Analyst, Specialty Financial  Analyst, and University  Commitment Office.</p>
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## Office of the Controller

### Budget Update

FY25 budget amounts are live in Workday for business managers to reference. As a reminder, please monitor your costs to ensure they stay within budget. This month, The Budget Office will send out spend management Excel file templates and instructions to all business managers to maintain their budgeted amounts. VPs/Deans of each cost center/school will be asked to certify these results reported on the spend management templates every quarter beginning this fall. More detailed instructions and training will soon be provided to you. This process will help ensure all cost centers stay within budget.

As communicated by the Budget Office, as a result of lower international student enrollment than originally budgeted, University leadership has recently requested each cost center reduce costs by another 2% in addition to the 2% cost reduction already requested in the originally approved budget totaling 4% total permanent cost reduction for FY25. These revised cost amounts will be reflected as a budget amendment in Workday later this month. Decisions on if merit will be granted for FY25 have been delayed in January.

## Office of University 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 on the Office of University Compliance and Ethics homepage:



<https://www.slu.edu/compliance-ethics/hotline.php>