

What's New . . .

March 2021

Business Managers' Meetings

The next Business Managers' Meeting is rescheduled for Tuesday, March 23rd, 2021, at 9:00 a.m. A Zoom link and agenda will be sent closer to the date.

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

Financial Planning & Budget Update

Distribution of the FY22 Budget files will not occur this week due to a couple variables:

- A delay in an important Workday report needed to budget personnel expenses.
- Approval of the merit pool, retirement match, and reinstatement of prior year travel reductions.

We expect to finalize the report later this week and incorporate it in our annual guidelines. The budget process timeline will be adjusted to account for the delay. Final budget files will now be due May 7th. Furthermore, the Business Manager Meeting scheduled for Thursday, March 11th will be moved to Tuesday, March 23rd as the primary purpose of this meeting is to walk through completing the FY22 budget.

Workday

- **New Reports**
 - **Award Budget by Object Class**
 - Used to see Grant & Award Budgets listed in the Award Plan. Summary level by Object Class. Access is limited at this time.
 - **Billable Transactions Summary by Object Class**
 - Used to see Grant & Award billable transactions, summary by object class. Ties to the Report of Transactions – Grants Management report.
 - **SLUCare Contract Revenue**
 - Shows detailed transactions for each Customer Contract by Revenue Category for a given ledger account and period.
 - **Asset Depreciation - Cost Center**
 - Shows depreciation by asset for each depreciation period. Access is limited at this time.

- **Report Updates**
 - **Budget vs Actual – SLUCare**
 - Added Specialty to drill down.
 - Updated to display more Revenue Categories & Spend Categories upon initial run.
 - **View Plan – by Org**
 - Added Specialty column to report.
 - **Fund Balance**
 - Previously missing non-operating ledger accounts in the YTD Revenue.
- **Reports In Progress**
 - **Receivable Aging by Org**
 - Cannot run for prior periods. Only works as of today's date.
 - **Statement of Account**
 - Missing non-operating ledger account breakout. Only being reflected in the Total Row.

Workday Financial Training

The team recently received results from the Business Managers relating to FDM and Workday Financial training needs. We are currently reviewing the results to develop additional trainings relating to Workday Financial Reporting and Worktag Usage. Watch for additional communication for Open Office Hours and formal training to further assist everyone with Workday Financials.

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

Human Resources

We hope that you are finding Business Manager Training to be of value. Thank you for your participation in the brief survey we sent out in February. Your suggestions for upcoming training have been received and our team is working to address those in future sessions.

Last month, Business Managers had the opportunity to attend *Budget and Forecasting- SLUCare*. If you missed that session you can access a recording [here](#).

In addition, *Workday Training: Procurement* was covered. You may view that session [here](#).

You may also access the *Workday Procurement Job Aid Crosswalk* through Workday [here](#).

This month, we are pleased to announce two new sessions:

1. *Workday Training: Workday Reporting for Budgeting & Forecasting- SLUCare*

Learn the basics of how to run Workday reports that will assist with the SLUCare budgeting and forecasting process. Click [here](#) to register.

2. *Building and Entering a Budget*

Learn how to complete Unrestricted budget files for salaries (including benefits) and general expenses, allocate a merit pool for compensation, and walk through an example. This session will be featured on March 23rd from 9 a.m. - 10:30 a.m. at the Business Manager meeting.

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.

Vacation Pay at Time of Separation

You may recall a new Staff Vacation Policy was approved effective October 1, 2020. We would like to remind everyone of the change to vacation pay at the time of separation. This change was implemented to encourage both usage during employment and as a cost-savings for the University.

Eligible staff members who have completed their orientation period, will be paid up to a maximum of 40 hours of accrued vacation in the event of separation from the University.

Employees cannot take more than 40 hours of vacation in the last 30 days of employment. A supervisor may allow an exception for an employee to take up to an additional 40 hours during that time frame, but the employee's vacation payout will be reduced by any number of hours taken over 40 hours. Under no circumstances can employees take more than 80 hours of vacation in the last 30 days of employment. Supervisors are responsible for reviewing all vacation requests and following this policy.

Employees are expected to be at work on their last day of employment.

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>.