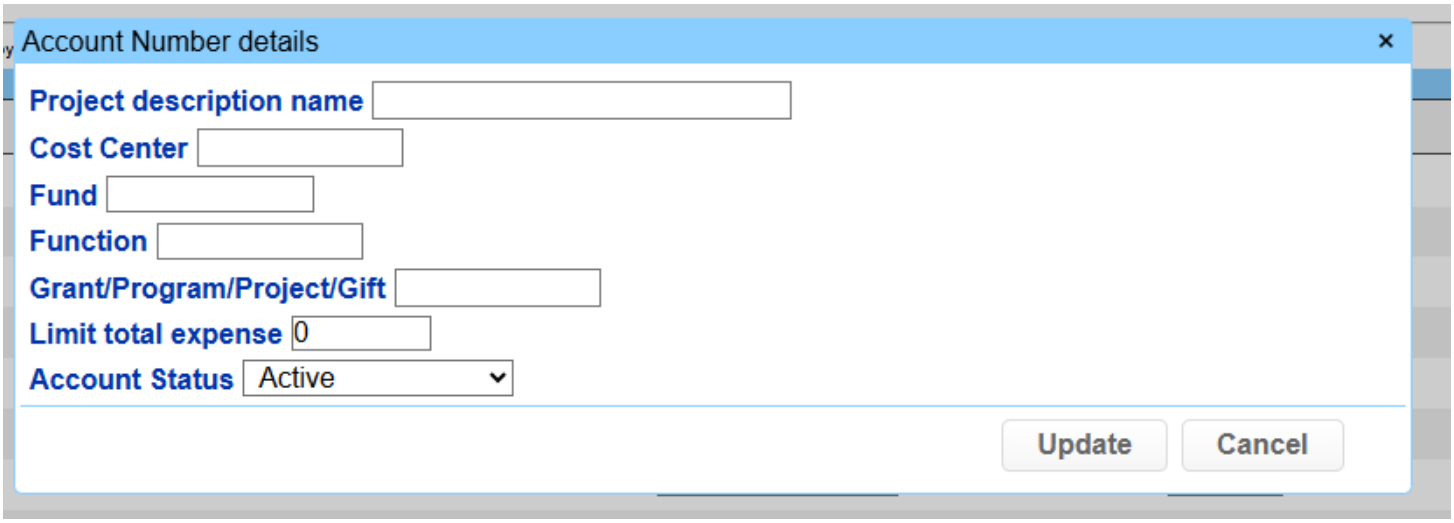
FOM Funding Instructions for PIs and Financial Assistants

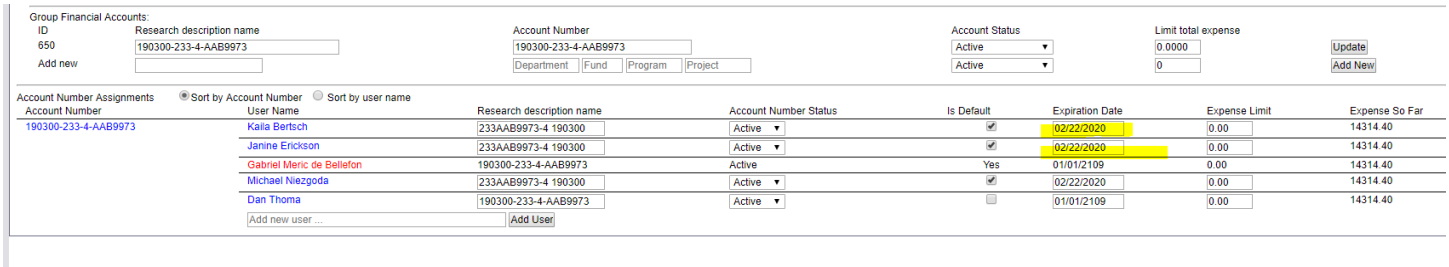
As a financial assistant, you will be copied on monthly test billing emails for your PI, so you will be notified of pending charges from the prior month before internal billing is posted in Workday. Please respond by the suspense date if you need to make any changes to the funding string or if you have any questions regarding the billing amounts.

1. If you would like to move charges to new funding, please go into the PI's FOM Supervisor account and make sure the funding is listed and is active. If not listed, you will need to add a new account number, enter the funding information, and add the user to this account. We will not be able to move charges until this is complete.
2. To add new funding, select supervisor home, select the appropriate PI if you are a financial assistant for multiple PIs, then go to group financial accounts.
3. Select Add new Account Number, and this screen will pop up:



   a. Account number will be used to process the billing in Workday, so please make sure all information is correct, update the funding string, or add new funding as required:
      1. Project description name is the name of the project that you want to describe (Research, etc.)
      2. Cost Center is two letters "CC" and six (6) digits (CC001011)
      3. Fund is two letters "FD" and four (4) digits (FD0136, etc.)
      4. Function code is two letters "FN" and four (4) digits (FN0400, etc.)
      5. Grant/Project/Gift is two letters and nine (9) digits. (ex, R000012345/PG000001234/ PJ000000123/ GF000012345).
      6. Enter the expiration date of the funding on which the funding will become inactive.
4. Once new funding has been added and there are users on the account, you can set or change the project's end date. Once the end dates are reached, that user will no longer have access to the lab with that funding. If the user has no other active funding on their account, they will not have access to the lab.

   FYI, users listed in blue have that PI as their supervisor; users listed in red have another supervisor listed on their account.



5. If a project has ended and you don't want the users to use the funding anymore, you will have to inactivate them on the project.

6. You can notify me then to move any charges in that current month to the new funding before the test emails come out.

For PI's to remove the FOM notifications: Click on "User Home" on the left panel, select "Go to my profile Page to set favorite resources" near the top of the page on the left. There is a long list of check boxes for the notifications you want to receive