

IN THE KNOW

UBCO Finance Operation's Newsletter

Finance Operations Updates and
Important Information



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WORKDAY ENHANCEMENTS



The Integrated Service Centre (ISC) continually updates Workday to align with UBC's evolving needs, incorporating feedback and collaborating with different units, faculties, and departments. For an update on planned enhancement, visit the ISC's [Workday Enhancements](#) website.

PROCESS FOR SUBMITTING EXPENSES ON BEHALF OF STUDENTS

UBC employees who submit expenses on behalf of UBC students can now submit these expense reports using student records in Workday. Expense reports for students are still initiated using the Create Expense Report for Non-Worker task in Workday, but the UBC Student External Committee Member (ECM) Web Form has been retired.

Tips for Student Expense Report Initiators (SERIs)

- It's recommended to search for a student record using the student number rather than the student's name to ensure you pick the correct person, as a name may return many results.
- Before submitting an expense report for a student, encourage them to add their direct deposit information in Workday as this allows for faster and more efficient payment.
- If the student does not have a Canadian bank account for direct deposit, ensure they check their Primary address in Workday is correct, as any cheques will be sent to this address.
- Be sure you have all the information you need to complete the expense report prior to initiating the task in Workday, as you will not be able to access any drafts created using Save For Later, or view or update a submitted expense report.



Note: Students who are employed by UBC are able to submit their own expense reports in Workday for employment-related expenses. For expenses related to their studies, students and student employees should be reimbursed through this process, to ensure expenses are reviewed prior to being submitted.

FDM CHANGE REQUEST BLACKOUT DATES IN WORKDAY



The July FDM change request blackout dates in Workday is July 8 to July 19.

This is to allow for successful Quarter end closure for FY25.

Future **blackout** dates are as follows:

- **October 4 - 16**
- **January 7-15**
- **April 7-25**

Change request types covered by the blackout:

- New Funds
- New Ledger Accounts
- New Spend and Revenue Categories (including relevant hierarchies)
- New Cost Center and Cost Center Hierarchy (CCH) requests, including modification requests that require Financial Reporting approval
- Approval of new worktags for Gifts, Gift Initiatives, Programs and Projects under the following fund codes:
 - FD300 Specific Purpose
 - FD400 Scholarships and Bursaries
 - FD500 Capital Activities | Unrestricted
 - FD550 Capital Activities | Restricted
 - FD8xx Endowment

If you have an urgent request for the above quarter end periods, please indicate this when you submit the FDM change request in Workday and it will be assessed.

REMINDERS



REVERT TO GRAY DEPOSIT BAGS AS NEEDED

Due to the high demand for RBC green deposit bags across BC the supplier has encountered challenges to meet the demand. RBC has agreed to allow the use of the old grey bags following the below procedure:

- Once you run out of green deposit bags, you can use the old gray deposit bags
 - To identify the deposit as HSBC write the word “**Purple**” using a marker or smudge-proof pen
 - RBC will soon supply purple stickers, which can be applied, and will negate the need to write “**Purple**”
 - If you need gray deposit bags please contact the Bookstore
- Once UBC fully migrates to RBC, purple stickers will no longer be required, and grey bag usage can continue

EMPLOYMENT VERIFICATIONS FOR PERMANENT RESIDENCY



Employment verifications for Permanent Residency (PR) are not provided by the faculty. UBCO employees should submit a request for PR employment verification from Payroll through the [UBC Self Service Portal](#):

Once in the portal, select:

- Request a Service
- Select Request General Workday Support
- Fill in your information
- Select Campus: UBC Okanagan
- Select Category: Payroll
- Select: Employment Verification

In the Description category, indicate that they are requesting employment verification for PR purposes. Please note that PR employment verification letters can take a minimum of 10 business days to complete.



WORKDAY WEDNESDAY SESSIONS

The Zoom links for the Workday Wednesday Sessions are now all the same link. Topics are found below for the next month, as well as posted on the “Events” calendar on the Workday Admins Team Channel.

Registration is not required, please copy link and session details to your calendar.

Workday Wednesday Zoom link:

[https://ubc.zoom.us/j/64655437858?](https://ubc.zoom.us/j/64655437858?pwd=ZDZybEZmNHJKSgzgxM2htY1kwdEtMZZ09)

[pwd=ZDZybEZmNHJKSgzgxM2htY1kwdEtMZZ09](https://ubc.zoom.us/j/64655437858?pwd=ZDZybEZmNHJKSgzgxM2htY1kwdEtMZZ09)

Meeting ID: 646 5543 7858

Passcode: 857874

PLEASE NOTE: THERE NO SESSIONS SCHEDULED FOR JULY DUE TO SUMMER BREAK

VANCOUVER LED WORKDAY TRAINING

TOPIC: SETTING UP A SUPPLIER: FOUNDATIONAL OVERVIEW



THIS COURSE WILL HELP NEW AND EXISTING STAFF AND FACULTY UNDERSTAND THE BASICS OF A SUPPLIER, INCLUDING DETERMINING THE CORRECT PAYMENT METHOD FOR A SUPPLIERS, AND THE STEPS TO SETTING UP A SUPPLIER IN WORKDAY.

JULY 9

AUGUST 20

SEPTEMBER 17

REGISTER THROUGH WPL



PREVIOUS ENGAGEMENTS

To review previous Workday Wednesday Sessions and the available resources, please visit [here](#).

RESOURCES

Below is some new/updated knowledge base articles for your reference:

Change My Government IDs

Updated: June 10, 2024

- Summary: Step 4 > Option A has been updated to show how to enter a former 9-starting Social Insurance Number (SIN) as an historical SIN.



Change Work Space

Published: June 5, 2024

- Summary: This new article gives an overview of the Change Work Space task, and a table of definitions for Workday's 'location' terminology.

Create an Expense Report for Student

Updated: May 21, 2024

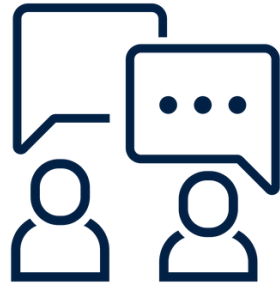
- Summary: Replacing the previous 'ECM Expense' process, Student Expense Report Initiators may use the 'Create Expense Report for Non-Worker' task to initiate student reimbursements.
- This KBA has been renamed from 'Create an Expense Report for Student/Non-Worker'.

[Previous Newsletter](#)

[Workday This Week](#)

[KBA: Workday Assistant](#)

[Navigating the Workday Home Page](#) (Updated)



Contact the Integrated Service Centre

To speak directly to a service representative, or if the inquiry is urgent, the ISC can be reached at **(250) 807-8163**.

[Submit a Workday support request here](#)

Hours of operation: Monday - Friday | 8:00am - 5:00pm

