Grant Structure Overview

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Award Structure in Workday

Workday Grants Management uses Awards and Grants to account for sponsored activity as shown in the figure below.

The Award corresponds with a notice of award and contains “header” data.

Figure 1. Workday Award Structure

The Award captures the sponsored award demographic information. Each Award has at least one Award Line. The Award Line defines the business rules to validate allowed costs, to apply Facilities and Administrative costs, to bill correctly, and to report on activities related to the sponsored award. More than one Award Line may be necessary in order to correctly process multiple F&A rates, billing terms, reporting periods, or for financial management purposes. Each Award Line is assigned one primary Grant. It is the Grant that is used in the COA charging instructions.
The Grant setup includes assignment in Workday of related COA segments for Cost Center, Program, Project, Assignee and Fund, which are known as Related Worktags. These related segments will default on transactions where the Grant is entered. The Grant collects the costs and is one of the required “funding components” of the Workday Chart of Accounts. Following are some of the principles used when related worktags are assigned to a Grant:

**Fund** – Assigned based on the type of sponsor funding:
- FD02 – Federal funding (including Federal pass-through)
- FD28 – Non-Federal funding
- FD29 – Industry funded clinical trials

**Cost Center** – Assigned based on award setup forms submitted by the department.

**Program** – Assigned to PG00032 Research (or PG00029 Stem Cell Research) unless something different is requested by the department, as not all sponsored awards and industry clinical trials relate to the research mission.

**Assignee** – Assignee is generally the Principal Investigator or other responsible faculty member. See the definition of Assignee and the Business Use Case Guide for details.

**Project** – A default of PJ000001 General Project will be assigned unless something different is requested by the department.

### Cost Share and Salary Limits (including Salary Over the Cap)

Cost Sharing and Salary Over the Cap costs are captured using the Grant assigned to the sponsor-supported costs. The same Grant will be used for both the direct costs and shared costs.

Cost Sharing charging instructions include some special considerations:

- Two funding components are present on the transaction line – the Grant and either Yale Designated or Gift.
- The Grant is informational and connects the cost sharing activity to the Award.
- The Yale Designated or Gift represents the true source of funding. As a result, the Fund on the transaction must be the one associated with the Yale Designated or Gift.

When entering a transaction for cost sharing (such as an Expense Report line), the user must first enter the Grant segment. The sponsored Fund on the Grant will default in. The user must then select/add the funding component that will be supporting the cost share, either a Yale Designated or a Gift. The related worktag Fund on the Yale Designated or Gift will automatically update/change the Fund that defaulted from the Grant. Order of data entry is important – Grant first, then the Yale Designated or Gift. If an error is made, it is best practice to delete all charging instructions from the transaction and start over, entering the Grant and then the Yale Designated or Gift.

Important information regarding cost sharing:

- Policy 1306 – Cost Sharing on Sponsored Projects
Outgoing Subawards

Workday assigns a unique Grant to account for subaward activity. The Grant number used for subaward activity will be a different number from the Grant used for non-subaward activity (standard direct costs and/or cost share activity). The Award Line to which the Grant is assigned identifies the Subrecipient, Facilities and Administrative Cost Rate and Limit, authorized funding, as well as other information. All activity related to the subaward for the life of the award is captured by the Grant.

If an Award has more than one subaward line, OSP will establish multiple Grants to house them (generally, the other related worktags will be the same).