

WORKDAY FINANCE ROLE REQUEST FORM

Use this form to request a change in an employee's security role access in Workday. Please complete the form and scan and email to help@miami.edu using your UM email account.

ROLE ASSIGNEE: (UM FACULTY OR STAFF)	
Name:	UMID:
Phone:	Email:
Position Number:	
NOTE: You are responsible for getting approval as per the matrix below prior to submitting a request	

Checklist Review for Security Role Requests:

Roles are assigned to a position by the Cost Center Manager (CCM), unless otherwise noted in the Approver column.

If you are requesting more than 10 worktags, submit with an Excel spreadsheet.

Request Type: Add <input type="checkbox"/> Remove <input type="checkbox"/>		Effective Date:		
INITIATOR AND REVIEW ROLES:				
Select the role to be assigned below and have the required approver sign in the Signature Box				
	Role	Description	Indicate all Cost Centers/Programs/Gifts /Grants that apply	Approver Signature (CCM or SBM)
<input type="checkbox"/>	Department Accountant	This role initiates accounting journals for assigned Cost Center(s) or a Cost Center Hierarchy. This role assumes the person assigned understands fundamental accounting concepts (i.e. debits, credits) and the Workday Financial Data Model (FDM).	<u>Cost Center(s)</u> <u>CCXXXXX</u>	Print Name: _____ Signature _____
<input type="checkbox"/>	Department Deposit Specialist	This role initiates recording "after the fact" cash deposits or withdrawals that appear on the Daily Bank Report sent by the Office of Treasury. (Note: On the Medical Campus, applies to Medical Finance only.)	<u>Cost Center(s)</u> <u>CCXXXXX</u>	Print Name: _____ Signature _____
<input type="checkbox"/>	Department Expense Data Entry Specialist	This role initiates expense reports and spend authorizations on behalf of other employees. This role initiates check requests to non-employees to reimburse for expenses related to University activities, including travel to campus.	<u>Cost Center(s)</u> <u>CCXXXXX</u>	Print Name: _____ Signature _____
<input type="checkbox"/>	Department Procurement Data Entry Specialist	This role initiates PCard transaction reconciliations and purchase requisitions on behalf of other employees. This role initiates a check request to pay suppliers.	<u>Cost Center(s)</u> <u>CCXXXXX</u>	Print Name: _____ Signature _____



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	Role	Description	Indicate [List all that apply]	Approver Signature (CCM or SBM)
<input type="checkbox"/>	Department Receiver	This role verifies that certain goods or services have been physically received and are appropriate for use (i.e. they are not damaged or defective). This role does not approve payment but verifies the receipt of already approved goods or services. Receiving is required for certain purchases (including consulting agreements, trackable assets/capital equipment, and non-capital equipment and furniture) before payment to a supplier can be made.	<u>Cost Center(s)</u> <u>CCXXXXXX</u>	Print Name: _____ Signature _____
<input type="checkbox"/>	Finance Business Process Initiator	This role initiates business processes related to payroll accounting.	<u>Cost Center(s)</u> <u>CCXXXXXX</u>	Print Name: _____ Signature _____
<input type="checkbox"/>	Finance Reviewer	This role has access to view cost center spend analytics. (Note: Individuals with the Finance Reviewer role are able to see compensation for any worker assigned to the organization the role is assigned to.)	<u>Cost Center(s)</u> <u>CCXXXXXX</u>	Print Name: _____ Signature _____
<input type="checkbox"/>	Gift Reviewer	This role has access to view spend analytics for assigned gifts.	<u>Gift(s)</u> <u>BGXXXXXX</u> <u>ENXXXXXX</u>	Print Name: _____ Signature _____
<input type="checkbox"/>	Program Reviewer	This role has access to view financial information about assigned Program(s). (Note: This is not an approver role and will not see compensation details unless coupled with the Finance Reviewer (FR) role.) CCM or SBM	<u>Program(s)</u> <u>PGXXXXXX</u>	Print Name: _____ Signature _____
				Approver Signature (CCSPM, CCM, or SBM)
<input type="checkbox"/>	Grant Reviewer	This role has access to view grant budget functions for assigned grants, business plan details and amendments.	<u>Grant(s)</u> <u>GRXXXXXX</u>	Print Name: _____ Signature _____



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		APPROVER ROLES: Select the role to be assigned below and have the required approver sign in the Signature Box		
				Approver Signature (SBM)
<input type="checkbox"/>	Cost Center Manager	This role initiates and approves certain Workday HR business processes for workers in their Cost Center(s) or Cost Center Hierarchy, including assigning costing allocations, changing organization assignments, creating payroll accounting adjustments, processing period activity pay and requesting one-time payments.	<u>Cost Center(s)</u> <u>CCXXXXXX</u>	Print Name: _____ Signature _____
<input type="checkbox"/>	Cost Center Sponsored Program Manager	This role approves several Workday Finance business processes for assigned Cost Centers including grant-related purchase requisitions, expense reports, spend authorizations, PCard transaction submissions, supplier contracts, Internal Service Delivery (formally IDR), and accounting journals.	<u>Cost Center(s)</u> <u>CCXXXXXX</u>	Print Name: _____ Signature _____
<input type="checkbox"/>	Program Manager	This role approves business processes related to his/her assigned Program and has access to reports and other information about the Program in Workday.	<u>Program Number(s)</u> <u>PGXXXXXX</u>	Print Name: _____ Signature _____
<input type="checkbox"/>	Gift Manager	This role approves business processes related to his/her assigned Gift and has access to reports and other information about the Gift in Workday.	<u>Gift Number(s)</u> <u>ENXXXXXX</u> <u>BGXXXXXX</u>	Print Name: _____ Signature _____
				Approver Signature (UHealth, AVP Medical Finance Or AVP Financial Planning & Analysis)
<input type="checkbox"/>	Senior Business Manager	This role approves certain Workday HR business processes (including editing position restrictions, creating positions, and compensation-related processes) as well as certain Workday Finance business processes (including purchase requisitions greater than or equal to \$25,000, spend authorizations equal to or greater than \$2,500, and non-grant related expense reports greater than or equal to \$10,000).	<u>Cost Center(s)</u> <u>CCXXXXXX</u>	Print Name: _____ Signature _____