

WORKDAY FINANCE SECURITY ROLE REQUEST FORM

INITIATOR & REVIEWER ROLES



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.

Checklist Review for Security Role Requests:

Roles are assigned to a position by the Cost Center Manager (CCM) only.

ROLE ASSIGNEE: (UM FACULTY OR STAFF)		Cost Center Manager (CCM)	
Name:		Name:	
Phone:		Phone:	
Position:		Position:	
Employee ID:		Employee ID:	
E-mail:		E-mail:	
Signature:		Signature:	
ACCESS REQUEST			
Request Type: Add Remove		Effective Date:	
INITIATOR & REVIEWER ROLES: Please select the role to be assigned to the user			
	Role	Description	Indicate [List all that apply]
	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>
	Department Deposit Specialist	This role initiates recording “after the fact” cash deposits or withdrawals (formerly cash journals) that appear on the Daily Bank Report sent by the Office of Treasury. (Note: On the Medical Campus, this role is held in Medical Finance only.)	<u>Cost Center(s)</u>
	Department Expense Data Entry Specialist	This role initiates expense reports (formerly eBERFs) and spend authorizations (formerly travel advances) on behalf of other employees. This role initiates check requests (formerly eChecks) to non-employees to reimburse for expenses related to University activities, including travel to campus.	<u>Cost Center(s)</u>

	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 (formerly eCheck) to pay suppliers.	<u>Cost Center(s)</u>
	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>
	Finance Business Process Initiator	This role initiates business processes related to payroll accounting.	<u>Cost Center(s)</u>
	Finance Reviewer	This role has access to view cost center spend analytics. <i>*Please note individuals with the Finance Reviewer role are able to see compensation for any worker assigned to the organization the role is assigned to.</i>	<u>Cost Center(s)</u>
	Gift Reviewer	This role has access to view spend analytics for assigned gifts.	<u>Gift(s)</u>
	Grant Reviewer	This role has access to view grant budget functions for assigned grants, business plan details and amendments.	<u>Grant(s)</u>
	Program Reviewer	This role replaces the “Responsible Person” in FRS and 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.	<u>Program(s)</u>