

In July 2023, UW is undertaking **UW Finance Transformation (UWFT)** to implement a modern, transparent finance infrastructure, designed to be a single source of trusted, timely and reliable financial information across the university. Migration to Workday Finance will provide a seamless, integrated solution for Human Resources, Payroll, Procurement and Finance.

In anticipation of this transition, here are answers to some questions you may likely be asking:

- **Why does UW need to make these finance system changes?**
UW currently relies on core financial software built in 1974! At that time we were a \$552 million dollar institution, and today UW revenues are nearly \$8 billion. As financial needs have grown, UW has iteratively added over 850 separate side financial systems and 900 custom integrations to run our financial operations today. To transform this model, the UW has been looking for a modern, 21st century system that can connect our complex work in a single, seamless solution.
- **How is SPH and the Department of Epidemiology preparing for these changes?**
SPH department administrators, finance directors and Dean's Office leadership formed a UWFT Readiness Team last year to prepare for this transition. Representation from Epi includes DJ Miller (Administrator) and Matthew Hawkins (Grants & Finance Specialist). We've been meeting weekly for several months and working diligently in close partnership to prepare SPH for all aspects of this move. Additionally, over 20 fiscal staff from across SPH departments have been voluntarily participating as trainers, systems testers and Power Users.
- **I've heard budget numbers are going away. How will I find and spend my money?**
The new system will have numbers but will be grouped by letter prefixes. For example, Grants will be GR123456, and there will be some new designations of Cost Centers (CC123456) and Programs (PG123456). **Your Epi finance and grants team have already mapped all of your current budget numbers to the new IDs and will have a list of your new fund identifiers to share with you closer to go-live in July.** Existing grants will also have the old budget number added in parenthesis temporarily to assist with the transition.
- **Which systems are being replaced by Workday Finance?**
Many separate campus systems are being replaced by the new, single system

(Workday Finance). The most commonly-used by our department are ARIBA (purchasing/travel/reimbursements) and MyFinancialDesktop.

- **I don't log into any of these systems now; will I even notice a change in July?**

The biggest change will be for finance staff with high touch in the new systems, but you may experience some slightly altered processes and some new players, especially around purchasing, travel and check-handling. Your budget numbers will certainly change and you may start to hear some new terms for our everyday processes (eg. cost center, worktag, assignee) ---**you'll hear more from us as we get closer to go-live in July**. Your Epi finance and grants team will help everyone adjust to the new terminology. As the system matures, you may find new opportunities (with software 50 years newer than we are using now), in its enhanced transparency across campus and expanded reporting capabilities.

- **What can I do to ensure a smooth transition for my work and my team?**

Please make any purchase, reimbursement or other finance requests that you can before May 31st. Current software systems will start to shut down during June while data is migrated, reducing our procurement options. Contact your finance team (including DJ Miller or Matthew Hawkins) to recommend the best approach if you anticipate unavoidable procurement during June. Manual solutions will continue to be available for most urgent situations, but may be slower and less optimal than our usual options and some procurement may temporarily not be possible. So, please plan ahead to ensure your critical work is not affected.

- **I'm a researcher; what's changing for me?**

Grant proposals are not affected by this transition - **SAGE and proposal submission will continue unchanged**. However, awarded grants will be entered into Workday to track purchasing and spending. Some grant administrative systems, including Grant Tracker and Effort Reporting are also being updated with new software that will integrate with Workday. Training for those will be available as they are launched.

- **I've heard some finance work is moving to the SPH Dean's Office. Will my finance and grants contacts change?**

As part of UWFT, each school has been asked to create a "shared-services environment" within its Dean's Office to perform some finance tasks. At SPH, most of the local finance services that you are used to are staying in departments, so your current team and contacts in Epi will not change. The biggest change that you may see is that some of the current compliance checks for procurement and reimbursement requests will now route through the SPH shared service center. If there is an issue with your travel reimbursement or purchase, you can anticipate that a shared service center staffer may be part of the team supporting you with your request. This new SPH Center for Financial Operations will also be partnering

with department finance staff behind the scenes, providing a central hub of support services, technical entry and accounting expertise, including performing several functions that are new to UW as we migrate to Workday.

- **Who is training my finance team?**

Central campus is providing hands-on training during May and June for all UW finance staff. Department administrators and their teams are working locally to internalize the new information and update forms and process flows. We're also forming new peer networks across SPH to connect people with similar roles, for another pathway to share their learning, experiences and solutions peer-to-peer as we move through these changes and adjust to new systems.

- **What can I do to help?**

We appreciate your continued patience and participation in planning ahead where you can. In May and June, your finance team are going to be absorbing a lot of new information and attending many hours of training in the new systems, as well as shepherding urgent issues using manual processes. Please be kind as they continue to support your work through a high-intensity period and patient if their response times are different than normal.

- **Who should I contact if I have more questions related to finance transformation?**

Please reach out to Epi's UWFT leads: DJ Miller (mrmliller@uw.edu) and Matthew Hawkins (matthawk@uw.edu).