

YSM BOOST Support Request Form

Department: _____ **Requested Start Date:** _____

Contact: _____ **Estimated duration of Support:** _____

Department and/or Cost Center(s) requiring access: _____

WORKDAY Non-Sponsored COA to charge BOOST support: _____

Yale Systems Access Needed:

Note: BOOST already has YSM wide Workday *reporting* access and IRES PD & PT Access

1. What is your department/unit organizational structure and approval process

2. How is your department organized for Procurement activities?

3. Should the Workday P2P access mirror that of the person we are supporting? If Yes, provide the name of the individual BOOST staff should mirror. Yes No

4. Will access need to be granted for any ITS managed network share drives? (Department will need to request shared drive access if needed.) Yes No

5. Will access need to be granted for YBT? (Department will need to request YBT access if needed.) Yes No

Additional access needed:

Skills Required (check all that apply):

Financial

- Financial Reporting
- Financial Statement Preparation
- Financial Statement Review & Reconciliation
- Accounts Payable / Invoice Processing
- Account Management (incl. Cost Transfers)
- Dept Budget Development & Monitoring
- Expense Report Review
- Procurement (SciQuest, Expense Reports)

Sponsored Awards

- Proposal Preparation / Other Pre-Award Tasks
- Grants Reporting and PI Projections
- Post-Award Expense Management
- Effort Reporting
- Other Compliance Monitoring (COI, HIC, etc.)
- VA IPA/JPA
- Dept Award Close Out Process
- Subcontract Invoice review and Monitoring
- Animal Protocols
- HIC Protocols

Human Resources

- Prepare Job Requisitions
- Faculty Merit Increase Processing
- HR Workday Profile Data Entry
- Providing access in workday

General Business & Operations

- Telecom Planning / Service Requests
- Desktop Support Planning / Service Requests
- Facilities Support Planning / Service Requests
- Space Management
- Equipment Management
- Systems & Applications Training
- Business Process / Best Practices Training

Other

- Advanced Excel (Pivot Tables/Filters)
- Power BI
- YBT
- USP process

Please use this space to list primary responsibilities for Boost Staff:

1	
2	
3	
4	
5	
6	
7	

Other (please specify) _____

Please return completed form to john.palmieri@yale.edu, YSM Finance