



Responsible Office: **School of Education Office of Budget & Finance**

Worktag Creation Structure: UWMSN SOE Worktags

Rationale/Purpose of the Guideline

To provide School of Education staff with clear instructions for requesting new Worktags in Workday, ensuring consistency and compliance with the Universities of Wisconsin's centralized Foundation Data Model (FDM) process.

Definitions

- **Cost Center:** generally identifies a university department. A budget, employees, and ongoing expenses are typically assigned to a cost center. This is considered a related worktag.
- **Driver Worktags:** determine the primary funding string for a transaction. There are four Driver Worktags: Grant, Gift, Project, and Program.
- **Foundation Data Model (FDM):** the single accounting structure for the Universities of Wisconsin. The FDM replaced the UW's chart of accounts, as well as the financial business requirements for UDDS.
- **Related Worktags:** populate automatically when a Driver Worktag is entered. Driver worktags may have one or more allowable related worktags associated with it. Having allowable related worktags provides the ability to change a default related worktag to one of the allowable worktags. A few examples of related worktags are cost center, activity, fund, and function.
- **Worktags:** attributes/labels assigned to each transaction in Workday to indicate its university purpose. Worktags are either driver worktags or related worktags

Scope

This guideline applies to all School of Education staff who need to request new Worktags in Workday.

Guideline Details

In the past, staff routed requests for new chart of account values to the UW-Madison central Business Services office. Under the new Workday model, all requests for new or modified FDM worktags (Cost Center, Activity, Gift, Program, Project) are routed to a centralized Universities of Wisconsin team. To request a new worktag, fill out the form via: [FDM Worktag Creation](#) . The requester will get a notification when the value is approved, and the worktag will appear in Workday, ready to assign transactions.

Naming Convention Format

UWMSN SOE - [Department Name] - [End Date (if applicable)]

Request Process

1. Identify the Need for a New Worktag

- Confirm the purpose (e.g., tracking a specific grant, project, or initiative).

- Ensure it's not duplicating an existing Worktag

2. Gather Required Information

- **Department Name:** (e.g., Curriculum & Instruction, Educational Psychology)
- **Description:** Start up funds for Jane Doe Lab
- **End Date** (if applicable, format as MM/DD/YYYY)
- **Worktag Type** (Cost Center, Activity, Gift, Program, Project*)

* Requests for new FDM values for grants will follow a different process. For information on Grants, refer to the Research and Sponsored Programs (RSP) Award Acceptance and Set-up [page](#) and specific [Job Aids](#) on Grants.

3. Construct the Worktag Name

- Example with end date:
UWMSN SOE – ELPA Jane Doe Start up Lab –12/31/25
- Example without end date:
UWMSN SOE – ELPA Kane Jane Doe Start up Lab

4. Create a Worktag

- Navigate to: <https://fdmmaintenance.wisconsin.edu/>
- Select “Request a New Tag”
- Select the following:
 - Company: UWMSN
- Worktag Type: Choose the applicable (Cost Center, Activity, Gift, Program, Project)
- Input the constructed name using the format above
- Fill in additional fields (depending on what you choose, you may have to also fill in gift, type, primary gift purpose etc. For programs, you have to have a default cost center, fund, function plus a program manager.
 - Description
 - Start/End Dates
 - Responsible Person or Department
 - Related Tags or Hierarchies
 - Provide a description/purpose for the creation of a new Worktag

5. Review & Approve

- Once you submit your request, it will rout to the SoE Office of Budget & Finance for approval
 - If you have any questions related to your worktag submission, please reach out to:
finance@education.wisc.edu

Other Resources

Worktags Quick Reference Guide [\[LINK\]](#)

Guideline Administration

Approval Authority

Chief Financial Officer, School of Education

Guideline Manager

Budget & Finance Director, Associate Budget & Finance Director, School of Education

Guideline Contact(s)

School of Education Office of Budget & Finance at finance@education.wisc.edu

Guideline History	
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