



# Healthy Workplace Initiatives Program Funding Guide

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# KEY CONTACT INFORMATION

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## IMPORTANT DATES

<b>June 3, 2024</b>	Funding period starts
<b>February 23, 2025</b>	<i>Optional: deadline to send all invoices/ receipts/ general ledgers for reimbursement before the end of the funding round. <b>Only if your department requires a partial reimbursement before the end of the fiscal year</b></i>
<b>May 2025</b>	Start gathering all documents and pulling general ledgers
<b>June 3, 2025</b>	The funding period ends. Submission Deadline for all invoices, reports, and surveys due

# RUNNING A SUCCESSFUL HEALTHY WORKPLACE INITIATIVE

## *Getting started*

- Connect with your manager or senior leaders about the HWIP initiative and ask them to promote and participate. This is an excellent opportunity for leaders to show their commitment to wellbeing. Senior leaders' involvement can also generate interest and inspire others to join the initiative.
- Enlist support from others to help coordinate or set up activities.
  - If your department has a wellbeing/wellness committee this may be a good place to start or enlist the support of those who are already interested in supporting wellbeing in your department. Create a small working group or planning committee to share the workload
  - Connect with a [Workplace Wellbeing Ambassador](#) in your department or Social/ engagement committee if you have one)
- Plan early and think beyond one-off events
  - Consider the different seasons and workload of the team. For instance, you can organize one activity or workshop per season (Fall, Winter, Spring, Summer)
- Brainstorm ideas and obtain feedback from those participating in the initiative. This gives a chance to voice ideas, increase buy-in and generate interest in the team.
- Consider how this initiative can be integrated into ongoing programming, processes, or initiatives (e.g., team meetings, Pro-D workshops, strategic sessions).
- When planning take into account accessibility, ease of access to workshops and activities, dietary restrictions, catering to varying physical abilities
- Include an educational component
  - If you are hosting a nutrition or food related event, consider bringing in a dietitian or nutritionist, or contact the Workplace Wellbeing team to provide free workshops and resources
  - The [Workplace Wellbeing team](#) also offers free training, on-demand workshops and consulting services

## *During your initiative*

- Get feedback from participants and monitor your progress
  - Check in regularly with your team to discuss progress, and determine, what is working or what could be improved. Review, adjust, and modify the plans. Having data can also be sent to managers and leaders to promote their continued support of the initiative
- Provide incentives to garner interest, but also recognize participation

## *After*

- Celebrating team achievements and success
  - Take time to celebrate your success, both and small.
  - You may wish to host a wrap up event or post the success of your initiative and activities so that everyone can the department can see it

# PROGRAM EVALUATION

Evaluation of health promotion initiatives is an important step to long term success. Evaluation can help identify ways to improve programs, justify the use of resources, assess an intervention's efficacy and help identify outcomes.<sup>1</sup>

## HR's Evaluation

As part of the Healthy Workplace Initiatives Program, you will be required to submit evaluation surveys.

<p><a href="#">Participant Post-Survey</a> (Minimum of 10 to be submitted): upon completion of your initiative</p>
<p><a href="#">Final Report</a>: completed by application leads, at the end of your programming.</p>

## Your Department's Evaluation

Participating departments are strongly encouraged to do their own evaluation throughout a Healthy Workplace Initiative Program. The feedback collected by HR relates to individual health behaviours, not program specifics.

Surveying your group will help to assess the program's rollout, popularity, viability and future sustainability. You will find a sample Department Evaluation as part of this toolkit.

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<sup>1</sup> O'Connor-Fleming ML et al., A framework for evaluating health promotion programs. Health Promotions Journal of Australia (2006), 17(1):61-66.

# REIMBURSEMENT GUIDELINES

*HWIP funds are reimbursed to the allocated department, not individual faculty/staff members.*

To ensure a smooth reimbursement process, please provide the following financial documentation:

## Required Documentation

- **Fill out the coversheet of expenses (please submit in Excel format)**
- **Copy of Invoices/Receipts**
  - Ensure each transaction matches the corresponding receipt in the coversheet of expenses.
- **Copy of General Ledger for Each Transaction**
  - Provide a PDF, Excel file, or screenshot of the General Ledger to find the general ledger.
  - Submit the ledger amount corresponding to what you are claiming\*
  - Clearly identify and label receipts to match the ledger amount.

***\*Ensure you have the appropriate security access in Workday to view your department's reports. If you cannot access your department's reports please connect with your finance team or supervisor***

## How to pull ledgers from Workday ( see appendix for example)

1. Search for Ledger Summary – Distributed Report
  2. Enter Worktags (Cost Center, Period, Program/Grant/Project/Gift/Gift Initiative/Activity)
  3. Select any amount in blue (either for month or Year-To-Date Total)
  4. Select PDF or Excel to save a copy that can be downloaded.
  5. Please match the ledger transactions to the receipts/invoices to facilitate reimbursement.
- **Your department's Workday Tags**--Include relevant tags such as fund, cost center, program, project, grant, gift, or gift initiative.

## Additional Information

- **GST Rebate:** The HWIP Fund will reimburse all approved transactions less the GST rebate (if applicable).
- **Alcohol:** The HWIP Fund will not reimburse for alcohol under any circumstances. If alcohol is included, it will be deducted from the total amount.

## Submission Process

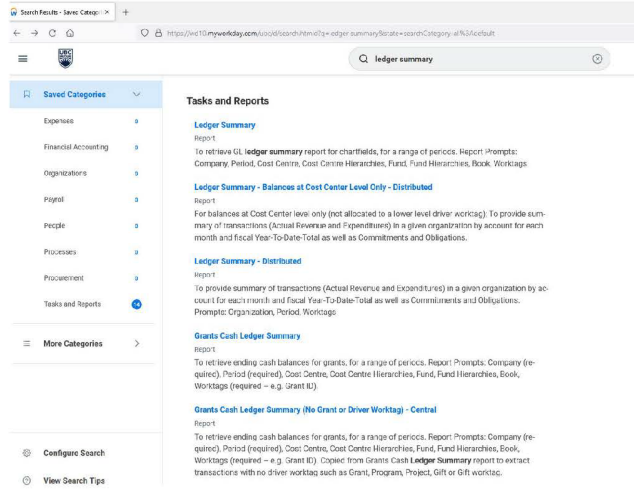
Send all documents via email to HR EMPL\_HWIP <ubcempl-g-hwip@mail.ubc.ca>

Your department will not be reimbursed until all the necessary documentation has been submitted for each transaction. Ensure all documents are complete and accurately labelled to avoid delays.

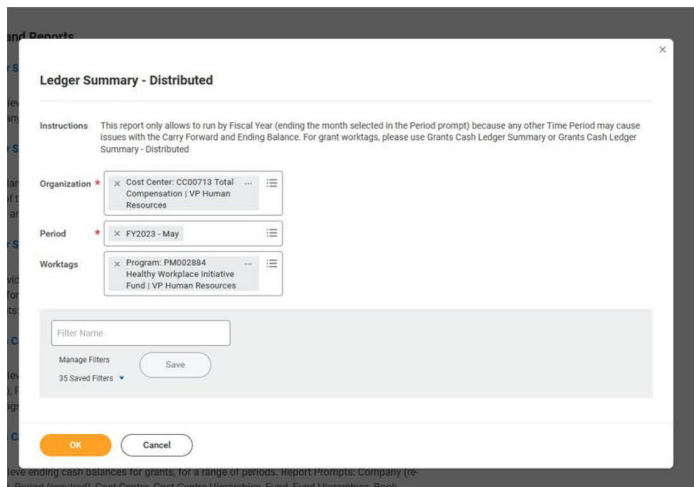
# Appendix: How to pull ledgers from Workday

## Reimbursement Guidelines : General Ledgers

### Step 1: Search for Ledger Summary – Distributed Report



### Step 2: Enter Worktags (Cost Center, Period, Program/Grant/Project/Gift/Gift Initiative/Activity)





Step 3: Select any amount in blue (either for month or Year-To-Date Total)

**Ledger Summary - Distributed**

Organization: Cost Center: 2000-10 Jobs: Compensation | YP Human Resources | Worktags: Program: M202864 Healthy Increase Initiative Fund | YP Human Resources

Period: FY2023 - May

13 Items

Ledger Account	Actual Expenditure					Ending Balance	Commitments Balance to Date	Obligations Balance to Date
	Exprires Balance	Apr	May	Year-To-Date Total				
Assets	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Liabilities								
2010 AP (Accrued Liabilities)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Cell Forward	0.00							
Expense	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
4000 Accounting Funding	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Expenses	0.00	0.00	4,556.23	0.00	0.00	0.00	0.00	0.00
6000 Supplies and Supplies	0.00	0.00	4,556.23	0.00	0.00	0.00	0.00	0.00
Total Expenses - Expenses	0.00	0.00	4,556.23	0.00	0.00	0.00	0.00	0.00
Prepaid Expenses								0.00
Balance Available								0.00

Step 4: Select either PDF or Excel to save a copy that can be downloaded.

13 Items

Options: View by: Select a Field... | Detail History: Select a Field... | Refresh

Journal	Journal Source	Accounting Date	Budget Date	Ledger Account	Fund	Cost Center	Date, Off. Project or Program	Translated Debit Amount	Translated Credit Amount	Operational Description	Purchase Order	Supplier Code or Employee Name	Credit Card Merchant Name	Invoice Memo	Line Memo	Internal Reference ID	Supplier Number
JE-000133241-UBO	1-Campus Manual	2023-04-14	2023-04-14	6300 Supplies and Supplies	F-2000 General Purpose Operating	0200103 Total Compensation   YP Human Resources	PV0020864 Healthy Increase Initiative Fund   YP Human Resources	221.55	0.00					HWP reimbursement for	HWP for 2021-2022 for		
JE-000133244-UBO	1-Campus Manual	2023-04-14	2023-04-14	6300 Supplies and Supplies	F-2000 General Purpose Operating	0200103 Total Compensation   YP Human Resources	PV0020864 Healthy Increase Initiative Fund   YP Human Resources	283.00	0.00					HWP reimbursement for	HWP for 2021-2022 for		
JE-000133244-UBO	1-Campus Manual	2023-04-14	2023-04-14	6300 Supplies and Supplies	F-2000 General Purpose Operating	0200103 Total Compensation   YP Human Resources	PV0020864 Healthy Increase Initiative Fund   YP Human Resources	439.94	0.00					HWP reimbursement for	HWP for 2021-2022 for		

To facilitate reimbursement, please match the ledger transactions to the receipts/invoices.