Department of Administrative Services

Workday Foundations

Agenda

STATE OF OREGON
THE UNION
1859

Introductions

Data Integrity Team

- Ryan Englund

- Libbie Saunders

Workday Classification and Compensation Administrator and SME

Shilo Muller

Workday Foundations

Data Integrity Team
Workday Foundations

- Worker Data

- Hire Process

- Job Change

- Additional Jobs

- **Compensation Change**

- Terminations

Workday Foundations – Compensation Changes

The *Request Compensation Change* is most commonly used to update/change salary and to add/remove allowances. Another frequent use is retroactive comp corrections.

We will cover both present changes and retroactive changes and the implications associated with both.

The following roles that can initiate these actions are: Managers, HR partners, and Compensation Partners.

Compensation changes are guided by Collective bargaining agreements, state policy, rules, and laws for the employee and position.

Prior to beginning a compensation change

- Reason for change? Vetted through policy or CBA process?
- Approval and/or documentation to support reason for change present? (Worker documents)
- Other related actions needed?
- Date of change (1st day paid in new rate)
- Is it retro? If so, is payroll aware?
- On current or prior position?
- Are there existing future dated compensation changes?
- Correction to PERS grade profile? Is it the 1st of the month?
- Where are we in the payroll processing calendar? Is it a payroll run day?

Compensation Change
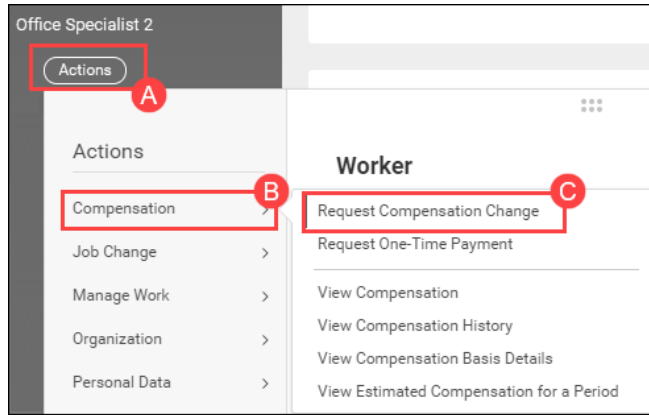
Step 1 – From the workers profile choose actions>compensation>request compensation change

Step 2- Choose the effective date. This date is the 1st day the worker will be paid this new amount.

You may often see multiple changes on the same date, the most recent (top) will be the active change carried forward.

Compensation Change

If the worker has 2 jobs, paid or rotational you will be asked for position. If you are making an entry for an allowance, be sure to enter it on the base position.

Compensation change reasons

Reason *

Search

Request Compensation Change >
Base Salary Change

Request Compensation Change >
Variable Compensation Change

Variable Compensation Change > Allowance Change

Variable Compensation Change > Correction

Base Salary Change > Brought to a Minimum
Base Salary Change > Compensation Changes for Salary Selective or Class Study (per CBA/Policy)
Base Salary Change > Compensation Structure Change
Base Salary Change > Correction
Base Salary Change > Cost of Living Adjustment
Base Salary Change > Decrease in Hours Worked
Base Salary Change > Disciplinary
Base Salary Change > Increase in Hours Worked
Base Salary Change > Job Reclassification
Base Salary Change > Market Adjustment
Base Salary Change > Merit
Base Salary Change > Other Unscheduled Salary Adjustment per CBA/Policy
Base Salary Change > Partial Pay During LOA
Base Salary Change > Pay Equity
Base Salary Change > PERS Pickup
Base Salary Change > Reinstate Salary
Base Salary Change > Salary Reduction in Lieu of Furlough
Base Salary Change > Special Merit Increase
Base Salary Change > Underfill - Meets Requirements

Compensation Change

Included in the Knowledge article: Compensation Change Request
There are specific instructions for each area as there are multiple actions that can be completed using the compensation change request business process.

-On Step change, Off step change (Salary different from step)

-Grade profile changes (underfill, overfill, Salary Selective)

-PERS grade profile change (AA, AP)

-Salary

-Allowance (start, end, or change)

Compensation Change

Guidelines

Total Base Pay Range
4,220.00 - 5,859.00 USD Monthly

Compensation Package
General Compensation Package

Grade
20

Grade Profile
AO-20-AP

Step
Step 10 - 5,859.00 USD

Progression Start Date
12/01/2023

Salary

Assignment Details
5,859.00 USD Monthly

Plan Name
Monthly Salary Pro Rated if Less than Full Time

Effective Date
12/01/2023

Allowances

Type of allowance: Click on the menu prompt to select **All Compensation Plans** (A) and select the appropriate **allowance plan** (B) being added (or type in the name of the allowance plan). (C) Choose the correct plan by selecting next to the name

Allowances

Enter and verify the compensation Percent (A) or dollar Amount (B) – based on the allowance selected, the appropriate Amount or Percent field will open for editing. If you selected a Percent plan, the Amount will automatically calculate based on the percent entered and workers assigned salary. Click on the open prompt (>) to open the Additional Details section (C).

Allowances

- To automatically end the allowance on a future date, enter the Actual End Date (B) of the allowance plan (this is the last date the allowance will be paid). To extend an allowance, a new request with an updated date can be submitted. This field can be left blank if you don't know the Actual End Date. If you only enter an Expected End Date (A) the allowance will not automatically end, but the dates can be reported on through various reports.

Allowances

Reminder: If you're adding an allowance with a retroactive start and end date, do not enter an Actual End Date. You will need to complete a second request compensation change after this action is complete to retroactively end the allowance by deleting the allowance the 1st day the worker is NOT paid the allowance.

Effective Date & Reason

Effective Date (A)

01/01/2023

Use Next Pay Period

No

Reason

Request Compensation Change > Variable Compensation Change > Allowance Change

Allowance

Assignment Details (B)

5% Monthly

Plan Name

Bilingual Differential

Effective Date

09/15/2022

Actual End Date

12/31/2023

Retro Changes

- Reasons may include:
  - CBA changes
  - Salary Selective
  - Settlement
  - Reclass
  - Audit results/correction
  - Award of allowance (i.e bilingual, leadwork, etc)

Corrections to existing Compensation

When making a retro change and there are existing future changes, you may have to make a series of changes to each of the existing dates where a compensation change has already been made such as COLA, merit, etc.

Some may carry forward (such as percent based allowances)

When making an additional entry for the same date the most recent action will override the existing compensation (Top of Stack)

Corrections to existing Compensation

10/25/2023	Ad-hoc Compensation Change	Successfully Completed	Administrative Specialist 2	Request Compensation Change > Base Salary Change > Merit	Guidelines		Package: General Compensation Package Grade: 20 Grade Profile: AO-20-AP	Package: General Compensation Package Grade: 20 Grade Profile: AO-20-AP
					Step		Step 09 - 5,253.00 USD (Progression Start Date: 10/25/2022)	Step 10 - 5,501.00 USD (Progression Start Date: 10/25/2023)
					Salary	Monthly Salary Pro Rated if Less than Full Time	5,253.00 USD Monthly	5,501.00 USD Monthly
10/25/2022	Ad-hoc Compensation Change	Successfully Completed	Administrative Specialist 2	Request Compensation Change > Base Salary Change > Merit	Guidelines		Package: General Compensation Package Grade: 20 Grade Profile: AO-20-AP	Package: General Compensation Package Grade: 20 Grade Profile: AO-20-AP
					Step		Step 08 - 5,014.00 USD (Progression Start Date: 08/01/2022)	Step 09 - 5,253.00 USD (Progression Start Date: 10/25/2022)
					Salary	Monthly Salary Pro Rated if Less than Full Time	5,014.00 USD Monthly	5,253.00 USD Monthly
08/01/2022	Ad-hoc Compensation Change	Successfully Completed	Administrative Specialist 2	Request Compensation Change > Base Salary Change > Cost of Living Adjustment	Guidelines		Package: General Compensation Package Grade: 20 Grade Profile: AO-20-AP	Package: General Compensation Package Grade: 20 Grade Profile: AO-20-AP
					Step		Step 08 - 5,014.00 USD (Progression Start Date: 01/01/2022)	Step 08 - 5,014.00 USD (Progression Start Date: 08/01/2022)
					Salary	Monthly Salary Pro Rated if Less than Full Time	4,863.00 USD Monthly	5,014.00 USD Monthly
01/01/2022	Ad-hoc Compensation Change	Successfully Completed	Administrative Specialist 2	Request Compensation Change > Base Salary Change > Pay Equity	Guidelines		Package: General Compensation Package Grade: 20 Grade Profile: AO-20-AP	Package: General Compensation Package Grade: 20 Grade Profile: AO-20-AP
					Step		Step 06 - 4,419.00 USD (Progression Start Date: 12/01/2021)	Step 08 - 4,863.00 USD (Progression Start Date: 01/01/2022)
					Salary	Monthly Salary Pro Rated if Less than Full Time	4,419.00 USD Monthly	4,863.00 USD Monthly

Retro Changes - Finalize

- Please work with and notify payroll when making retro changes (prior pay period)
- Anything prior to the 'no retro prior to' date will need to be manually calculated/paid by payroll

What to do after you have done it all

If you discover a mistake – Things **YOU** can correct

Request Comp Change
- Grade
- Grade Profile*
- Step
- Salary
- Allowance dollar amount
- Allowance end date (if a future date)

*AA to AP, etc– Agency can only do if 1st of the month eff date

Edit Position
- Pay Basis Code
- FTE

- We do not rescind errors that agencies have the ability to correct on their own
- Make sure the effective date of any correction you make is the same as the original comp change date
- If you get an error with an effective date you are trying to use, send in a help case
- **PLEASE** leave comments with details of what you updated any time you use Edit Position

What to do after you have done it all

If you discover a mistake – Things you need to submit a Workday Help Case for assistance

- ANY comp change on a prior job segment
- Effective date – if agency cannot correct on their own
- Grade Profile AA to AP, etc if not 1st of month eff date
- Allowance type – % vs $

If you initiate one of these Business Processes and then remember its not something you can do, please cancel the action and then send in a case. We cannot finish those actions for you.

Reports for Audit

CMP | Compensation Changes Report
CMP | In Progress Compensation Changes
CMP | Workers Off Step (within Range)
CMP | Workers with Mismatched Job Profile/Grade Profile

Allowance Reports
HCM | Worker Allowances Report
HCM | Reclass Events with Change Details
CMP | Compensation Changes for Workers with Amount Allowance Plan

Additional Job Reports
Multiple Job Workers | All Workers

Questions?

Next up…..

Termination