

Department of Administrative Services



Workday Foundations

Agenda

1. Introduction
2. Series Overview
3. Compensation change
4. Audits and Reporting
5. Close



Introductions



Data Integrity Team

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- 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.

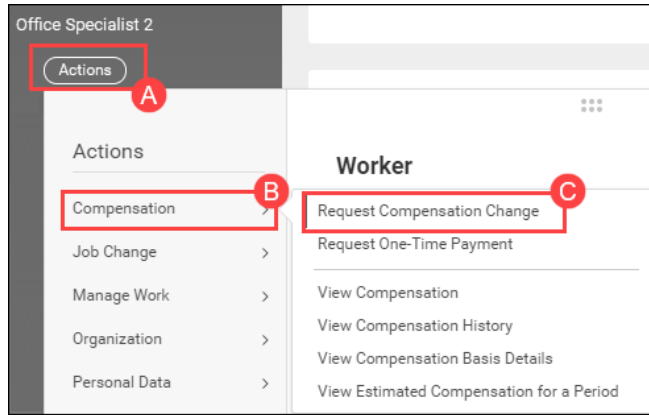
Compensation changes are guided by Collective bargaining agreements, state policy, rules, and laws for the employee and position.



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.

A screenshot of the "Request Compensation Change" form. The form has a title "Request Compensation Change" and a horizontal line below it. There are three main fields: "Effective Date" with a red box around the date "09/15/2022" and a calendar icon; "Use Next Pay Period" with an unchecked checkbox; and "Employee" with a red box around a greyed-out dropdown menu and a hamburger menu icon.

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.

Request Compensation Change

Effective Date * 09/15/2022

Use Next Pay Period

Employee * **A**

Position * **B**

C

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

A screenshot of a software interface for adding allowances. At the top left is an "Add" button. Below it is a dropdown menu with options: "By Compensation Rule", "All Compensation Plans", "All Compensation Plans in Compensation Package", "By Compensation Package and Rule", and "Search". A red box labeled "A" highlights the "Search" option. A second dropdown menu is open, showing "All Compensation Plans" selected, with a red box labeled "B" around it. Below this, a list of allowance plans is shown with radio buttons: "Acute Care Differential - Amount", "Advanced Marijuana Licensing Specialist Differential - Percent", "American Nurses Association Credentialing Center", "Automotive Service Technician Differential - Percent", and "Bilingual Differential". A red box labeled "C" highlights the "Bilingual Differential" option. Below the list is another "Add" button. The "Assignment Details" section below is empty.



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).

Allowance

Compensation Plan ↶ ✓

× Bilingual Differential ... ☰

Percent *

5 A

Frequency *

× Monthly ... ☰

Amount
175.00

Currency
USD

C > Additional Details

Allowance

Compensation Plan ↶ ✓

× Bilingual Differential ... ☰

Amount *

500.00 B

Currency *

× USD ... ☰

Frequency *

× Monthly ... ☰

C > Additional Details

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.

A screenshot of a web form titled "Additional Details" with a dropdown arrow icon. It contains two date input fields. The first field is labeled "Expected End Date" and has a red circle with the letter "A" next to it. The second field is labeled "Actual End Date" and has a red circle with the letter "B" next to it. Both fields contain the placeholder text "MM/DD/YYYY" and a calendar icon. The fields are highlighted with red rectangular boxes.

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)

Edit Position

- Pay Basis Code
- FTE

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

- 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?

The background of the slide is a light green color. On the right side, there is a decorative graphic consisting of several overlapping, wavy, vertical bands. The outermost band on the right is a fine grid of thin, light green lines. The other bands are solid light green with varying opacities, creating a layered, organic effect.

Next up.....

Termination

