WORKDAY FUNDAMENTALS:
HCM INITIATE 2 & ACADEMIC PARTNER

SESSION 2

UNIVERSITY of WASHINGTON
INTEGRATED SERVICE CENTER
OBJECTIVES

UNDERSTAND AND PERFORM BUSINESS PROCESSES FOR ACADEMIC PERSONNEL

• Review Session 1
• Create Position – Faculty
• Hire – Faculty
• Hire – Graduate Student
• Assign Period Activity Pay
• Voluntary FTE Change
REVIEW SESSION 1

• In your own words, what is a Supervisory Organization?
• What are some of the differences between Position Management and Job Management staffing models?
• What are the two types of compensation changes, outside of the annual merit increase?
• What are the two formats you can export from Workday for reports?
CREATE POSITION
FACULTY
CREATE POSITION

OVERVIEW

• A position is created when there is not already an existing one available for one of the following types of employees;
  – Staff Campus
  – Academic Personnel – indefinite and multi-year/librarian
• Positions can be created independently or as part of the requisition for staff
• Requisitions are not use for Academic Personnel
**POSITIONS IN WORKDAY**

Positions consolidate key job information:
- Job family
- Job profile
- Worker type
- Location
- Compensation range
- Level of full-time equivalency (FTE)

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DEMONSTRATION

• ‘Create Position’ for an Assistant Professor
  – ‘Job Profile’ – Assistant, Associate, Professor
HIRE
FACULTY and GRADUATE STUDENT
HIRE WIZARD

OVERVIEW

• Hire Wizard is to be used PRIOR to the hiring process
• Hire Wizard will help reduce duplicate person records in Workday by checking existing UW records
• Employee information found in Person Registry and Student Database determines the action needed in Workday
• Hire Wizard MUST be used for;
  – Academics/Affiliates
  – Students
  – Contingent Workers
HIRE WIZARD

PROCESS INITIATION

• Hire Wizard is to be used PRIOR to initiating the following processes:
  – Hire – Student
  – Hire – Academic Personnel
  – Change Job – Student
  – Change Job – Data Change – Extend Employment End Date – Student (eligibility)
  – Add Additional Job – Student (eligibility)
  – Contract Contingent Worker
ACADEMIC APPOINTMENTS

KEY CONCEPTS

• Academic Appointments track detailed information
  – Start/End Dates, rank, title, tenure status, academic unit
• Academic Appointments DO NOT drive pay or benefits
• All academics (paid or unpaid) will have an ‘Academic Appointment’ in Workday
• Academics can have multiple Academic Appointments in Workday
  – Joint, Dual, Administrative, Affiliate, etc.
ACADEMIC APPOINTMENTS

KEY CONCEPTS (cont’d)

• Appointments are distinct from ‘Positions’ in Workday
  – Academics will have BOTH an Appointment in an Academic Unit AND a Position/Job in a Supervisory Organization

• Academic Appointments are updated corresponding with actions, such as ‘Reappointment’ or ‘Promotions’

• Academic Appointments can be ended independent of a ‘Termination’
  – Example: ending of an administrative appointment
DEMONSTRATION

HIRE - FACULTY

• Hire an ‘Assistant Professor’
  – Find the approved position
  – Attach the Academic Appointment packet to the hire business process
  – ‘Academic Appointment’ will be a sub process of the hire
WORKDAY JOB PROFILES FOR RA/TA/SA

CONSOLIDATED JOB PROFILES FOR RA/TA/SA

• When hiring a graduate student in Workday, it is important to choose the correct ‘Job Profile’
  – ‘Research Assistant (E S UAW ASE)’ covers ALL previous ‘RA/PDRA1/PDRA2’ job codes
  – ‘Teaching Assistant (E S UAW ASE)’ covers ALL previous ‘TA/PDTA1/PDTA2’ job codes
  – ‘Graduate Staff Assistant (E S UAW ASE)’ covers ALL previous ‘SA/PDSA1/PDSA2’ job codes

• Do not choose any of the job profiles for ‘Predoctoral Researcher’ for any standard RA jobs
  – If you think you need to use it, call the Office of Fellowship & Awards

• Do not choose ‘Research Assistant (E H UAW ASE) ‘Job Profile’
  – The ISC is being asked to eliminate the job profile
WORKDAY JOB PROFILES FOR RA/TA/SA

CONSIDERATIONS

• Graduate student salaried positions are ‘Fixed Term (Fixed Term)’
  – Refer to the Employee Subtype Decision Tree
• All student positions (graduate and under-graduate) must have an ‘End Date’
• ‘Scheduled Weekly Hours’ drive FTE
  – Remember: DO NOT change the ‘Default Weekly Hours’
• The compensation process will not work properly, and student will be paid inaccurately, if any of the above are incorrect
• Tuition waiver interface in SDB is tied to correct compensation information
DEMONSTRATION

HIRE – GRADUATE STUDENT

• Hire an ‘RA’
  – ‘Compensation Package’ should auto-populate with ‘General Compensation Package’
    ▪ Do not change
  – ‘Grade’ should auto-populate to ‘Grad Student RA’
    ▪ Do not change
  – ‘Grade Profile’ indicates paying at the general/base rate
  – ‘Step’ is indicated with a number (1,2, or 3), indicating the salary schedule and the academic level (premaster, intermediate, candidate)
PERIOD ACTIVITY PAY
PERIOD ACTIVITY PAY

OVERVIEW

• ‘Period Activity Pay’ is a set amount evenly distributed over a defined period of time
  – ‘Period Activity Pay’ can only be attached to an existing job
  – You must first enter the job and have it approved
• ‘Period Activity Pay’ can be used for assignments outside of the Workers regular job
  – ‘Activity Pay – Academic Personnel Supplemental Activities’ – Faculty member working more than 100% FTE due to an emergency instructional coverage for an entire quarter
  – ‘Activity Pay – Stipends/Fellowship’ – Employee is in the ‘Stipend’ job family and is a graduate student eligible for GAIP benefits
DEMONSTRATION

‘PERIOD ACTIVITY PAY’ FOR AN ‘SA’ ON A STIPEND

• This can only be accomplished once the hire process is complete for the ‘SA’
JOB CHANGE vs DATA CHANGE
CHANGE JOB OVERVIEW

CHANGE JOB vs DATA CHANGE

• Change Job
  – Promotion: move to a ‘Job Profile’ with a higher maximum salary range or pay grade
  – Transfer: Workday functionality uses ‘Transfer’ to allow an initiator to request the move of an employee from another SupOrg
  – Later Move: Move to a new ‘Job Profile’ and ‘Position’. Move to a new SupOrg may or may not happen

• Data Change
  – Location Change
  – ‘End Date’
  – Going from Full Time to Part Time and vice versa
DEMONSTRATION

JOB CHANGE – DATA CHANGE

• ‘Voluntary FTE Change’ for faculty
  – ‘Scheduled Weekly Hours’
  – Establish the new FTE percentage
ASSESSMENT
SECURITY ROLE REQUEST
ASSESSMENT AND SECURITY ROLE REQUEST

• The Assessment is timed for 30 minutes
• (Placeholder for assessment URL)
  – Select ‘Account’ to ensure you are logged in as yourself in Canvas
• From the ISC website
  – Select ‘Security Role Request Change Form’