WORKDAY FUNDAMENTALS: TIME AND ABSENCE INITIATE

WORKDAY TRAINING

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PRE-MATERIALS
WORKDAY ORGANIZATIONS
WORKDAY ORGANIZATIONS

WHEN “USER” IS NAVIGATING IN WORKDAY:

SUPervisory Organization Hierarchy

Based on reporting relationship

Cost Center Hierarchy

Based on relationship of UW budgets*

*UW Budgets are Cost Centers in Workday. The budget number will stay the same.

Academic Unit Hierarchy

Based on appointments*

*Appointment: A person's academic relationship (found on the Academic tab in Workday).

Note: Appointments in Workday are separate from positions. Academic Appointments track a person's academic relationships, and the characteristics of those relationships, such as start dates, end dates, appointing unit, rank, etc. Academic appointments can be updated in the event of a reappointment or promotion.
SUP ORGS IN WORKDAY

• Supervisory orgs (sup orgs) are the primary organizational structures of data collection in Workday.

• Workers are grouped and tracked in each organization by management hierarchy.
  – Manager is the person who is accountable for performance reviews.

Dunder Mifflin Staff

<table>
<thead>
<tr>
<th>Type</th>
<th>Supervisory</th>
<th>Superior Organization</th>
<th>Information School (Henry Carlyle (871003902))</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organization ID</td>
<td>SUP-003956</td>
<td>Subordinates</td>
<td>Dunder Mifflin Contingent JM</td>
</tr>
</tbody>
</table>

**Details**

- Availability Date: 01/02/2017
- Type: Supervisory
- Subtype: Supervisory
- Visibility: Everyone
- Top Level: University of Washington
- Superior: Information School (Henry Carlyle (871003902))
- Subordinates: Dunder Mifflin Contingent JM
- Primary Location: Seattle Campus
Supervisory Organizations are also used to:

- Drive **reporting**
  - Including vacancy reporting if applicable
- Provide a **framework for inheritance** of security roles and other elements
- Route **business processes** (in conjunction with security roles)
In Workday, every supervisory organization has a staffing model.
- Determines how jobs are defined and filled
- Provides different levels of control over staffing
- Supports different staffing goals

The are two types of staffing models:
- Position Management
- Job Management (JM)
In Workday, every supervisory organization has a staffing model.
  • Determines how jobs are defined and filled
  • Provides different levels of control over staffing
  • Supports different staffing goals

The are two types of staffing models:
  • Position Management
  • Job Management (JM)
STAFFING MODELS: POSITION MANAGEMENT

What Makes The PM Staffing Model Useful

• Data, aka the bread and butter of Workday:
  – Track unfilled, filled, closed, and frozen positions
  – Tracks history of position as people come and go while maintaining continuity
  – This data helps sup orgs @ UW plan better for vacancies/filling

• Hiring into existing positions is simple and saves the time of having to create a new one each time.
Position Management Populations

1. All staff including UW Medical Centers
2. Academics
   • Multi-year, Indefinite
   • Librarians
3. Contingent Workers (Managers only)
STAFFING MODELS: POSITION MANAGEMENT

POSITION MANAGEMENT

Employee Hired
Employee at his/her position
Employee leaves and position remains
Employee leaves...

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STAFFING MODELS: JOB MANAGEMENT (JM)

What Makes The JM Staffing Model Useful

• Provides flexibility in hiring by relying on staffing workflows and approvals as opposed to permanent position fills. Funding can also be more flexible as a result.

• Less administrative burden on hiring manager, fewer transactions in Workday.
  – Set hiring restrictions equally to all jobs
  – Single requisition to hire multiple workers

• Data, aka the bread and butter of Workday:
  – Track and report on filled jobs only
STAFFING MODELS: POPULATIONS

Job Management (JM) Populations

1. Students
2. Academic (short-term):
   • Faculty (Annual or Shorter)
   • Academic Staff
   • Educators
   • Extension Lecturers
   • Medical Residents/Fellows
   • Senior Fellows/Trainees
3. Contingent Workers (non-Managers)
STAFFING MODELS: JOB MANAGEMENT (JM)

- Employee Hired
- Employee at his/her job
- Employee leaves and takes the position with him/her-self
- Employee leaves...
TRACKING A BUSINESS PROCESS, INBOX, & NOTIFICATIONS
In Workday, users involved in a Business Process have the ability to view the details around a business process as soon as it is initiated.

We have multiple methods to track a business process:
- Worker History for a specific worker
- Inbox – Actions tab for anything awaiting my action
- Inbox – Archive tab for anything I've completed

Tracking business processes are vital in identifying the history/workflow of a transaction and can help to answer questions around the details included, the overall status, and the users/roles who are part of the process.
INBOX AND NOTIFICATION OVERVIEW

• In your role, you will receive both Inbox items and notifications that will help you manage your work.
• Sub-process action items that come to a Time and Absence Initiate from a larger process will be found in the Inbox as To Do items.
• Once action items are complete, they are moved to the ‘Archive’ section of the Inbox.
  – Must click Submit to mark a To Do item as complete.
KNOWLEDGE CHECK

WRITE DOWN YOUR ANSWERS

• Through which website can you access Workday to log in?
• What is a Supervisory Organization?
• What are some of the differences between the Position Management and the Job Management staffing models?
WELCOME TO WORKDAY TRAINING

1. Log into the computer
   > You can select the Mac or Windows Build (there will be no difference during training since we will be working in an internet browser)
   > Enter your regular netid & password

2. Log into the Workday Training Environment
   > Open Chrome browser
   > https://wd5-impl.workday.com/uw6/login.htmlld

<table>
<thead>
<tr>
<th>User Name:</th>
<th>See Handout</th>
</tr>
</thead>
<tbody>
<tr>
<td>Password:</td>
<td>See Handout</td>
</tr>
</tbody>
</table>

3. Open the ISC website in another tab/browser
   > https://isc.uw.edu

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WORKDAY TRAINING

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YOUR INSTRUCTOR(S) AND TRAINING

Lei Robinson
Training & Communications Specialist - ISC

Lenore Ordonez
ISC Stabilization and Support

Need to get in contact with us?
ischelp@uw.edu
YOUR INSTRUCTOR(S) AND TRAINING

We are great at:
– Introducing you to the specific role and responsibilities this training is designed for
– Showing you the tool, its limitations and abilities, and navigational tips
– Finding the right person to answer your question if we don’t know the answer

We don’t know as much about:
– UW, state, or federal policy analysis
– Knowing, handling, or optimizing processes unique to your unit
– Your role outside Workday

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TODAY’S AGENDA

• Warm-Up
  – User guides
  – Training setup
  – Workday tour

• Role & responsibilities

• Core concepts, demos, hands-on practice
  – Work Schedules
  – Time Tracking
  – Absence (Time Off)

• Interactions with Payroll

• Reporting
THE ISC SPACE

- Bathrooms
- Water
- Coffee shop on the Mezzanine floor

A special note: ISC employees are busy handling a huge influx of requests since go-live. While visiting, please use your instructor(s) as a direct resource. If the need arises or you are following up on a request, they can help you connect with the right person @ the ISC.
LEARNING SPACE

• The training room is not a prison
• Software training—getting ahead and falling behind
• Retention and learning
• Breaks
WARM-UP
USER GUIDES TOUR / HANDS ON ACTIVITIES

> ISC.UW.EDU > User Guide Library

> Filter by role

> Open user guide: Enter Time
  > Use Table of Contents for quick navigation
  > Grey Boxes can be expanded for field-level details
    > Review or edit the following fields
    > Do not use or edit the following fields
HANDS ON ACTIVITIES

- Add the optional worklets, **Team Time Off** and **Favorites**, to your home screen using the settings gear at the top right of your home screen.
- Click the Cloud Icon to update **Search Preferences** to ‘All of Workday.’
> Home/Landing Page
> Search Menu and Search Categories
> Supervisory Organization Profile
> Worker Profile and Related Actions
BUSINESS PROCESSES IN WORKDAY
WHAT IS A BUSINESS PROCESS?

• A business process is a set of tasks that you will initiate, act upon, and complete in order to accomplish a business objective.

• Business processes can be initiated ad hoc or as a sub-process of a larger process.

• When a business process is initiated, Workday routes the tasks to the responsible roles and enforces security and business rules throughout the business process.
STARTING A BUSINESS PROCESS

There are multiple ways to navigate to a business process:
- Worklet
- Search bar
- Worker Profile > Related Actions

Ensure that all information is entered correctly

How to identify required fields

Workday Errors and Alerts
- Red – Error, hard stop
- Yellow – Alert, warning that you can transact past
THE ROLE OF A TIME & ABSENCE INITIATE
DEFINING THE ROLE

The Time and Absence Initiate is the unit expert who serves as:

- The “**Process Gatekeeper**” to coordinate with the Employee and Time & Absence Approver to ensure processes are completed in a timely manner.

- The “**Data Steward**” who validates all time and time off entries prior to payroll processing and coordinates with the Employee to make corrections or resolve errors.
AN EFFECTIVE TIME AND ABSENCE INITIATE...

• Thoroughly understands how to initiate business processes related to time entry and time off in Workday.

• Has a basic understanding of resolving issues related to time entry and time off and is aware of additional resources to refer to.

• Shares knowledge of Workday time and absence concepts with colleagues.
RESPONSIBILITIES
PRINCIPAL DUTIES

• Interaction with three business processes relating to Time and Time Off Management:

1. Assign Work Schedule
2. Enter Time
3. Request/Enter Absence and Correct Absence (Time Off)
## PRIMARY RESPONSIBILITIES

<table>
<thead>
<tr>
<th>Business Process</th>
<th>Time &amp; Absence Initiate Responsibilities</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Assign Work Schedule</td>
<td><strong>Assign accurate</strong> Work Schedules for all employees.</td>
</tr>
<tr>
<td>2. Enter Time</td>
<td>Note: The <strong>Employee</strong> still holds the responsibility for complying will all policies and regulations.</td>
</tr>
</tbody>
</table>
| 3. Request/Enter/Correct Absence | The Time & Absence Initiate:  
  • Is responsible for ensuring **policy compliance and data validation** for time tracking and time offs.  
  • Can **initiate** and **submit** processes, including some input that the Employee **cannot** do. |
ADDITIONAL RESPONSIBILITIES

• Review Job Aid available on ISC site and run reports prior to payroll. Utilize data in reports to:
  – Ensure compliance of rules and policies
  – Validate Time and Time Off entries and make edits as needed

• Accurate and timely payout of Compensatory Time Off and Holiday Credit Time Off on the annual June 30 deadline (Classified Staff).
  – See User Guide: Enter Absence – Administrative
KNOWLEDGE CHECK

• What are the three main business processes that you will interact with as the Time and Absence Initiate?

• Aside from the three business processes, what are other activities that the Time and Absence Initiate is responsible for?
WORK SCHEDULES
ASSIGN WORK SCHEDULE OVERVIEW

• Work Schedules are assigned to all employees (excluding Med Centers) and are utilized in various time calculations including overtime and straight time.
  – They are **duration based** and track hours worked per day for a **Mon-Sun week**.
  – Work Schedule Assignments are most important for **daily OT eligible** and **Midnight Divide** employees.
    ▪ Daily OT Eligible employee include Non-Exempt Salaried within the SEIU 925, WFSE, Inlandboatmen’s Union, and Teamsters bargaining units

• When viewing a worker’s schedule, Workday defaults **in/out times** for all work schedules.
  – These are placeholders and **do not need to match an employee’s actual in and out times** (except Midnight Divide Work Schedules).
WORK SCHEDULES VS. TIME BLOCKS

Work Schedules indicate expected duration hours.

Time blocks (timesheets) should reflect actual hours worked.

Workday will compare an employee’s reported time to their work schedule per day and per week to automatically calculate total hours, including OT/ST & Shift Differentials.

Did the employee earn overtime?

What time did the employee come in/out for work?

How many hours did the employee work per day/week?
ASSIGN WORK SCHEDULE OVERVIEW

• Time & Absence Initiates can Assign Work Schedules to make an update on an *ad hoc* basis if no other worker details are changing i.e. No change in FTE, Work Shift, etc.
  – Example: 100% FTE worker changes from 5 shifts to 10 shifts during the summer

• Time & Absence Initiates will also receive Inbox To Do Items to Assign Work Schedules as part of an overall process
  – E.g. Hire, Change Job, Return from Leave

• The Assign Work Schedule process routes to Time & Absence Approver
  – Employee can also initiate via Request Work Schedule
ASSIGN WORK SCHEDULE

• See the Assign Work Schedule User Guide for the Work Schedule Decoder
  – FTE
  – # Days of Week
  – C= Constant/Consistent hours per day; V= Variable hours per day
  – # Hours /Day and Which Days of Week
  – Default

• Can’t find a Work Schedule?
  – Contact the ISC if a work schedule for a daily overtime eligible employee does not exist as the daily duration of hours affects time tracking calculations.
  – For all other employees, select the Work Schedule that most closely resembles the actual scheduled hours.
    ▪ There are no negative impacts within Time Tracking or Absence for nonexempt CNU, nonexempt Professional Staff, or exempt employees that do not have an exact work schedule.
Work Schedule assignments will have a direct, indirect, or no impact to time calculations and pay, depending on the employee population.

For **Daily OT Eligible employees**, assign the Work Schedule that reflects the expected **daily duration hours** as this drives time calculations (e.g. OT and ST) that impact Payroll.

For **hourly employees**, assign the **No Event Work Schedule** to ensure that time calculations are sent to Payroll correctly.

For **all other employees** (regardless if eligible for time tracking), assign the work schedule that matches the FTE and is closest to daily duration hours.
ASSIGN WORK SCHEDULE DEMO

- Tracking a Business Process
  - Inbox – Actions, Archive
- To Do Items in your Inbox
  - Assign Work Schedule (As a Sub Process)
  - 2-step process to complete the action (or identify action not needed), then Submit the To Do item
- Assign Work Schedule
  - Start Date: Select a Monday start for ad-hoc updates. Otherwise, align with the start date of the overall process (e.g. Change Job-FTE)
  - End Date: Optional. Leave blank for open-ended/indefinite schedules
  - Work Schedule examples:
    - 100-5C8-MonTueWedThuFri (Default)
    - 50-4V examples
    - Midnight Divide examples
    - No Event - 7 Day (Default)
- View Work Schedule
  - In/Out Times don't matter, except for Midnight Divide employees

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TIME TRACKING OVERVIEW

• Time & Absence Initiates support employee types that track time in Workday:
  – Hourly (NE H)
  – Non Exempt Salary (NE S)
  – *Small populations of Exempt Salary (E S)

• Consistent with past practices, Faculty and Exempt Salaried Staff (E S)* will not be tracking time
TIME TRACKING OVERVIEW

• Time Types vary by population
  – All time entry Time Types that the worker is eligible for will be available in the drop-down menu.

• Examples of Time Types:

<table>
<thead>
<tr>
<th>Time Type</th>
<th>Time Tracking Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hours Worked - In/Out</td>
<td>Default time type for most Hourly employees.</td>
</tr>
<tr>
<td>Hours Worked - In/Out, Do Not Pass to Payroll</td>
<td>Default time type for most Non-Exempt Salaried employees.</td>
</tr>
<tr>
<td>Flex Time Worked - In/Out or Hours, Do Not Pass to Payroll</td>
<td>To be used for makeup/flex time. Does not impact Daily OT calculations. Available to eligible Non-Exempt Salaried employees.</td>
</tr>
<tr>
<td>Standby – In/Out or Hours</td>
<td>To be used for “on call” time. Available to eligible Non-Exempt Salaried employees.</td>
</tr>
</tbody>
</table>
TIME TRACKING OVERVIEW

- **Perks of Workday**
  - Auto-calculation of Time Calculation Tags for overtime and shift differential.

- **See appendix for ad-hoc time tracking scenarios that may require Time & Absence Initiate Input.**
  - Run Calculations
  - Hours Worked-No Rounding
ENTER TIME – DEMO 1

• **Hourly** worker example via **Team Time Worklet** > Enter Time
  For Worker
  – Micro-Edit Time Block
  – Warning message, if applicable
  – Correct or delete individual time blocks
  – Submit – Includes timesheet attestation
  – View Time Block Statuses on the timesheet
    ▪ Not Submitted, Submitted, Approved
ENTER TIME – DEMO 2

• **Classified** worker example via **Worker Profile Related Actions > Time and Leave > Enter Time**
  – Quick Add
  – Enter Cost Center Details on time block to override default or costing allocation
  – Clear time entries for the week
    ▪ Deletes all time blocks (Not Submitted, Submitted, Approved)
**ENTER TIME – DEMO 3**

- **Classified** worker example
  - Auto-Fill From Prior Week
    - Can select to copy comments and details as well
  - Correct individual time blocks
  - View Time Calculation Tags
  - Enter Compensatory Time Earned Worktag
    - In the Details section of the time block where the Overtime was calculated

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HANDS ON ACTIVITY

See Page 2 of Handout:

- Run the report: My Supporting Roles
  - To view the Supervisory Organizations You Support

- See Handout for the Employees you can Transact On
# HANDS ON ACTIVITY

Practice the following processes on the worker assigned to you by the instructor:

<table>
<thead>
<tr>
<th>For your assigned....</th>
<th>Exercise</th>
</tr>
</thead>
</table>
| **Hourly Employee**   | 1. **Assign Work Schedule** from Related Actions on Worker Profile or My Team’s Schedule:  
  • Select No Event - 7 Day (Default) |
| **Classified Employee** | 1. **View Work Schedule** from Related Actions on Worker Profile or My Team’s Schedule:  
  • You can re-assign the work schedule if you’d like to test out the impacts to Time calculations |
| **Hourly and/or Classified Employee** | 2. **Enter Time** from Team Time Worklet or Related Actions on Worker Profile  
  • Micro-Edit Time Block, Quick Add or Auto-Fill From Prior Week  
  • Clear Time Entries for the Week; Correct or Delete individual Time Blocks  
  • Select different Time Types and view Time Calculation Tags  
  • Enter Cost Center Details to override the default or Costing Allocation  
  • For Classified Employee – Enter Comp Time Earned worktag on time blocks with O/T |
KNOWLEDGE CHECK

WRITE DOWN YOUR ANSWER

• When would it be beneficial to use auto-fill from a prior week rather than a micro-edit time block?

• Where is the Compensatory Time Earned Worktag entered?
**ABSENCE OVERVIEW – BALANCE AS OF DATE**

- **Balance As Of Date**
  - Only looks to the past when returning balances details.
  - Workday will take into consideration future absences already submitted or approved when requesting/entering absences.
PAYROLL TIME OFFS – ACCRUALS & FORFEITURES

- Workday will automatically post Payroll Time Off accruals and will process certain forfeitures for eligible employees. Visit the [UWHR Time offs, leaves & holidays page](#) for more information on eligibility and accrual rates.
  - **Compensatory Time Off** – Accrual posts at the beginning of the workweek in which it was accrued. This accrual will not post until the timesheet where the Compensatory Time Accrual was calculated has been approved.
  - **Holiday Credit Time Off** – Accrual posts the day of the Holiday for all workers in the First Shift. For employees assigned to all other Work Shifts, the accrual posts the day prior to the Holiday to accommodate the Midnight Divide.
  - **Personal Holiday Time Off** – After the initial accrual based on eligibility and Time Off Service Date, all subsequent accruals post at the start of each calendar year on January 1.
    - Personal Holiday Time Off is automatically forfeited if not used or donated by December 31.

*Accruals are driven by FTE and pro-rated for employees less than 100%.

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PAYROLL TIME OFFS – ACCRUALS & FORFEITURES (CONT.)

– **Vacation Time Off** *– Accrual is based on Months of Service and posts on the last calendar day of the month, but it cannot be used until the first of the next month.
  - For Classified Staff, any Vacation Time Off in excess of 240 hours is automatically forfeited on the Time Off Service Date in Workday (Anniversary Date). A UW Email Alert is sent to employees approaching the maximum.
– **Sick Time Off** *– Accrual posts on the last calendar day of the month but it cannot be used until the first of the next month. Initial accrual is based on Time Off Service Date.
  - If Time Off Service Date is 1\textsuperscript{st}-15\textsuperscript{th} of the month, initial accrual posts on the last calendar day of that same month.
  - If Time Off Service Date is 16\textsuperscript{th}-last day of the month, the employee does not accrue hours for that month and initial accrual posts on the last calendar day of the following month.
  - All full-time staff earn 8 hours of Sick Time Off per month, no matter the employment program and months of service.

*Accruals are driven by FTE and pro-rated for employees less than 100%.
REQUEST ABSENCE – LEAVE VS. TIME OFF

• **Time Offs** are used for most absences in Workday and can affect Payroll (e.g. Sick, Vacation, Personal Holiday, Unpaid)
  – Entered for any time where the Employee did not work when normally scheduled
  – Some Time Offs do not affect payroll. E.g. Tracking Time Off-FMLA tracks FMLA entitlements.
• **Leaves** (noted with LOA in the title) are used for absences that are considered a long term absence from work, typically greater than two weeks.
  – Includes absences that may qualify for the Family and Medical Leave Act (FMLA), Disability Leave, or Parental Leave.
  – Leaves (with the exception of Summer Hiatus Leave and Sabbatical) **do not affect an employee’s pay.** All non-payroll leaves will need an accompanying Time Off request.
REQUEST ABSENCE – LEAVE VS. TIME OFF

• Leaves and Time Offs are requested by the employee via the same Request Absence process. Once requested, all Leaves and Time Offs display on the employee’s Absence Calendar.

• Employees who are not familiar with the differences are incorrectly selecting a Leave instead of Time Off.
  – For example, when the employee types in “Sick,” they are presented with 4 different options.
REQUEST/ENTER ABSENCE – TIME OFF HIERARCHY RULES

• Hierarchy Rules – Workday has a set of validations to generally enforce a hierarchy for time off usage.
  1. Using Holiday Credit Time Off before other paid Time Offs *(Professional Staff only)*
  2. Exhausting Discretionary Time Off before using Vacation Time Off (Professional Staff Only)
  3. Exhausting all Time Offs before Shared Leave Time Off usage (Workers on approved LOA-Shared Leave of Absence)
  4. Using available and appropriate paid Time Offs* before Unpaid Time Off
     *Sick Time Off and Personal Holiday Time Offs are not evaluated in these hierarchy rules.

• When a Worker completes the Request Absence process, this is a hard stop. The Time/Absence Initiate can transact around these validations in the Enter Absence process.
ENTER ABSENCE – DEMO 1

• Absence Calendar
  – Balance As Of Date
  – Use arrows to navigate through the calendar and view Time Off entries

• Holiday Taken Time Off
  – Can request all Holidays through the remainder of the calendar year in 1 request
  – Automatically approved
  – Removes “Holiday Credit – Time Off” accrual

• Correct Absence – Holiday Taken Time Off
  – Click on approved time off and select the minus button to remove
  – Automatically approved
  – Triggers accrual of “Holiday Credit – Time Off”
ENTER ABSENCE - DEMO 2

• Vacation Time Off
  – Verify Balance As of Date
  – Click and drag for multiple days, do not include days the employee would not normally work (e.g. Exclude weekends)
  – Error message – Future Time Off request
  – Navigate through Absence Calendar and verify Balance As of Date

• Time Off Entry - Submitted
  – Click on request, select Absence Event to View Business Process History

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ENTER ABSENCE - DEMO 3

- Cancel Absence that has been submitted (not yet approved)
  - Click into Absence Request and select Cancel this Request button

- Correct Absence that has been approved
  - Use the plus/minus icons to adjust entries
  - Submit for re-approval
ADDITIONAL ABSENCE CONCEPTS
ABSENCE OVERVIEW – TIME TRACKING & TIME OFFS

- For Sick/Vacation Accruing (SVA) employees who are also tracking time, all Time Off entries will be displayed in the timesheets.
  - Some Time Offs can also be entered through the Enter Time process.
  - Because balances are displayed in the Absence calendar, we recommend that all future-dated time off requests be transacted through the Request Absence business process.
ABSENCE OVERVIEW – TIME TRACKING & TIME OFFS

- If Time Off is entered after a timesheet for the week has already been filled out, go back to the timesheet to update the time blocks for hours not actually worked.
  - Employee will be alerted with a warning.
  - Alternatively, rather than logging the Sick Time Off in the Absence Calendar, the Employee can update the impacted time blocks and enter the Time Off in the Enter Time process.
ABSENCE OVERVIEW – WORKERS ON LEAVE

- Workers on Leave can have up to 3 different entry types on their Absence Calendar
- **Leave** Types
  - Typically entered by Employee or HR/Academic Partner
  - Designation only, no impact to Payroll* Excluding Sabbatical and Summer Hiatus
  - Begin with LOA in the title
  - Example: LOA – General Request-Sick/Injured Leave
- **Time Off** Types
  - Entered by Employee (or Time & Absence Initiate)
  - Passed to Payroll
  - Examples: Vacation Time Off, Sick Time Off, Unpaid Time Off
- **Tracking Time Off** Types
  - Entered by HR/Academic Partner to track entitlements
  - Begin with Tracking in the title
  - Examples: Tracking Time Off-Parental, Tracking Time Off-FMLA, Tracking Time Off- Disability
WHEN TO CONTACT UWHR

- UWHR approval is needed in these scenarios before the ISC can complete the transactions in Workday.
  - Prior Service Credit: [http://hr.uw.edu/ops/leaves/prior-service-credit/](http://hr.uw.edu/ops/leaves/prior-service-credit/)
  
  - Awarding Discretionary Time Off (Pro Staff): [http://hr.uw.edu/ops/leaves/discretionary/](http://hr.uw.edu/ops/leaves/discretionary/)
  
  - Exceptions to 240 hour rule for Vacation Time Off (Classified staff)
    - Otherwise, Vacation Time Off in excess of 240 hours will be forfeited on the Employee’s Anniversary Date (Workday Time Off Service Date)
    
  - Exceptions to 6/30 Holiday Credit Time Off and Compensatory Time Off Payout (Classified Staff)
    - Otherwise, Time & Absence Initiate is responsible for completing the payout process. See User Guide: [Enter Absence – Cashout of Compensatory Time and Holiday Credit](http://hr.uw.edu/ops/leaves/discretionary/).
ADDITIONAL ABSENCE CONCEPTS

See the Appendix for Additional Absence Concepts:
– Workers on Leave – More details on Absence Calendar entries
– Workers on Leave- Standardize Work Schedule
– Workers on Leave – Consistent Time Off Hours
HANDS ON ACTIVITY

Practice the following processes on the **Classified** worker assigned to you by the instructor:

- Navigate to Team Time Worklet or Related Actions on Worker Profile
- Enter Absence
  - Test out time off usage hierarchy. View alerts and transact past them.
- Select Absence Event to View Business Process History
- Review how absences are reflected in time sheets
- Cancel an In Progress (Submitted, but not approved) request
HANDS ON ACTIVITY

Remove all **Time** & **Time Off** entries you entered in today’s course for both your **Hourly** and **Classified** workers:

– Enter Time
  ▪ Delete individual time blocks or Enter Time > Clear

– Enter or Correct Absence
  ▪ Cancel each individual Time Off Request
KNOWLEDGE CHECK

WRITE DOWN YOUR ANSWER

1. True or False? For Classified Staff, Workday will automatically pay out Compensatory Time Off and Holiday Credit Time Off on the annual June 30 deadline.

2. If a 100% FTE normally works Tues-Fri, what should they enter on their Absence calendar for Labor Day (Monday)?
   a. 8 hours of Holiday Taken Time Off
   b. 8 Hours of Holiday Credit Time Off
   c. Nothing

3. Fill in the Blank: An employee is out sick for a week. Assuming a balance is available, the employee should select __________ when requesting an absence.
TIME TRACKING AND PAYROLL

• Cost Centers on Time Blocks are sent to Payroll:
  – Cost Center, Project, Option Task Codes entered on a time block will override the default cost center or any existing Costing Allocations for the employee.
  – The details entered on a time block will affect the budget that the pay is pulled from, but will not affect the timing or the amount of the pay.

• Time and Absence Initiate will be responsible for entering, or verifying Costing Allocations Overrides on Time Blocks
TIME TRACKING AND PAYROLL

• All Time Calculation Tags are passed to payroll, unless indicated by “Do Not Pass to Payroll”
  – Salaried employees who track time will receive a paycheck regardless of whether time is entered. They will be out of compliance if they do not submit their timesheets and will not receive any overtime pay if they qualified. It is the Time and Absence Initiate’s responsibility to ensure this is happening
  – Hourly employees will not get paid appropriately if time is late or inaccurate.
ABSENCES AND PAYROLL

- Time Off types that are passed to payroll will display on the payslip
  - Paid Time Offs will display as Individual line items on the payslip in the Earnings Section.
    - A majority of Administrative Time Offs transacted centrally will also display. Example: Vacation Payout (Terminated employees)
  - Paid Time Off Balances are also displayed in the payslip.

- Time Off Types that are not passed to payroll will not display on the payslip
  - Tracking Time Offs
CORRECTIONS AND RETRO ADJUSTMENTS

• Time and Time Off can be entered, or corrected (including additional details), up until the Payroll Lock Date, which is visible on the Timesheet.
  – See 2017 Campus Payroll and HCM Calendar – By Payday
  – Cost Center, UW Project, UW Task, and/or UW Option can be changed up until the Payroll Lock Date. After the Payroll Lock Date, these details should not be updated via the enter time process and rather should be completed as expense transfers in MyFD.

• After the Payroll Lock Date, retro time or time off can be entered
  – Utilize the same Enter Time and Request/Enter/Correct Absence processes
  – Pay for retro time/time off will be reflected in the paycheck for the pay period in which the entry is actually submitted & approved, with reference to the original dates in which the time/time off was associated to.

• Contact the ISC
  – Retro time/time off beyond 90 days in the past
KNOWLEDGE CHECK

WRITE DOWN YOUR ANSWER

• What does “Do Not Pass to Payroll” indicate on a Time Entry type?
• When would a salaried employee receive overtime?
• How do you override a default cost center for hours worked?
• How do we pay employees for retro/back hours worked?
USING PROMPTS

• Prompts are fields or check boxes that can be displayed before you run a report.
• Prompts can be optional or required.
• Multiple values can be selected based on the desired results.
• You can save prompt values for future use as a filter.
SORTING AND FILTERING

• Sorting
  – By Ascending or Descending

• Filtering
  – By Filter Condition and Value fields
  – Numerical
    ▪ Equals, Greater Than, Less Than, Between, Is Empty
  – Textual
    ▪ Is Empty
    ▪ Is allows users to select values from a list
INTERACTING WITH RESULTS

• Drilling or View Details
• Related Actions to perform additional actions
• View Details, Export to Excel, and Export to PDF
There are two exporting options:

- Export to Excel
  - Excel allows for manipulating a report and its data
- View printable version of PDF

Exporting allows users to share data outside of Workday and security controls.

All UW data governance and security policies apply.
REPORTING DEMO

• Favorites Worklet > Manage Favorites
  – In the **Favorite Custom Reports** menu, add any UW report with an “R” number
  – R0521 Reported Time Blocks
    ▪ To view time entry codes and calculation tags for entered hours

• Report navigation
  – Reporting prompts
  – Sorting and filtering
  – Export to Excel or Print to PDF

• Access reports in Worklets
  – Team Time Off Worklet > Time Off Summary
    ▪ To view Beginning Balance, Accruals, and Time Off Paid in Period, and Ending Period Balance Including Pending Events
REPORTS FOR PAYROLL

- **Workday Reports Home Page**
  - This page includes Known Issues and Recent Updates
  - **Job Aid: Workday Reports for Time and Absence Initiates and Approvers**
  - **Workday Reports Catalog**
    - A list of reports that provides detailed information on what is included in a particular report, regardless of your security role.
    - Workday provides a report listing which standard and custom reports you can run in Workday (a report of reports).

- See the Appendix for sample report screenshots
**REPORTS FOR TIME & ABSENCE INITIATE**

- Run reports prior to payroll processing to validate Time and Time Off entries

<table>
<thead>
<tr>
<th>Report Name</th>
<th>Time &amp; Absence Initiate To Validate</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Reported Time Blocks R0521</td>
<td>• Have all timesheets been submitted and approved?</td>
</tr>
<tr>
<td>• Zero Hour Time Sheets R0408</td>
<td></td>
</tr>
<tr>
<td>• Validate Time Reported Matches Weekly Scheduled Hours R0017</td>
<td>• Do all time and time off entries align with expected Work Schedule duration hours?</td>
</tr>
<tr>
<td>• Work Schedule/FTE Mismatch Audit R0465</td>
<td>• Are all of my workers assigned to the appropriate Work Schedule?</td>
</tr>
<tr>
<td>• Work Schedule Assignment by Organization R0576</td>
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</tr>
<tr>
<td>• Overtime by Employee R0010</td>
<td>• Was overtime and straight time calculated correctly?</td>
</tr>
<tr>
<td>• Audit Holiday Taken Time Off Missing Entries R0335</td>
<td>• Was Comp Time Earned requested appropriately?</td>
</tr>
<tr>
<td>• Audit Unpaid Holiday R0012</td>
<td></td>
</tr>
<tr>
<td>• LOA Tracking Audit Report R0490</td>
<td>• Did employees enter Holiday Taken Time Off on the Holiday if they would have normally worked?</td>
</tr>
<tr>
<td>•</td>
<td></td>
</tr>
<tr>
<td>• If an Employee requested Unpaid Time Off the day prior to a Holiday, did they also enter Unpaid Time Off on the Actual Holiday?</td>
<td></td>
</tr>
<tr>
<td>• Did employees on leave (excluding Summer Hiatus and Sabbatical) also enter their applicable Time Off types, only for the days they would normally work?</td>
<td></td>
</tr>
</tbody>
</table>
RESOURCES

• Contact the ISC:
  – (206) 543-8000
  – ischelp@uw.edu
  – https://isc.uw.edu

• Access Workday:
  – https://wd5.myworkday.com/uw/d/home.htmlld

• User Guides, reference materials, additional resources:
  – https://isc.uw.edu/resources/
  – https://isc.uw.edu/admin-corner/

• Workday Training
  – https://isc.uw.edu/workday-training/

• DUO website:
  – https://identity.uw.edu
RESOURCES

- Additional Time & Absence resources can be found on the ISC Website

- Quick Guides & Job Aids
  - https://isc.uw.edu/resources/quick-guides/
    - Request Time Off
    - Holiday Taken Time Off
    - Leave of Absence
    - Etc.

- Workday Training
  - https://isc.uw.edu/workday-training/
    - Webinar Recordings: Advanced Time and Absence
      - Works Schedules and Time
      - Time Off

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GETTING YOUR ROLE

Step 1. Attend training.

Step 2. Give us a few days to get your attendance recorded in our systems.

Step 3. If your HR or Academic Partner hasn’t submitted a security role request* to the ISC for you, make sure they submit it:
   – Non-Med Centers: https://isc.uw.edu/admin-corner/security-roles/
   – Med Centers: HRWMS@uw.edu

Step 4. Your HR or Academic Partner will hear from us as soon as you’ve been granted the role.

*If they already submitted the request, please just have them reply to the case they have open letting us know you finished your training on a certain date and time.

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MORE TRAINING?

• Feel free to re-attend training!
• Study your notes, user guides and this slide deck if there is a lot of time between when you get your role and taking the class.
• Don’t forget to practice!
• If you have more than one security role, ensure you’re attending all of the appropriate trainings via our training home page on the ISC Website.
QUESTIONS?
THANK YOU
ADDITIONAL ABSENCE CONCEPTS – WORKERS ON LEAVE (LOA)
WORKERS ON LEAVE – ABSENCE CALENDAR ENTRIES

• When the Employee or HR/Academic Partner requests/enters a Leave of Absence, select the full span of time the worker will be out, including weekends.
  – Absence types that start with LOA are leaves of absence, and will put that worker on leave status. This leave status (with the exception of Summer Hiatus Leave and Sabbatical) does not affect their pay.

• The Employee or Time & Absence Initiate enters Time Off, such as Sick Time Off, Vacation Time Off, or Unpaid Time Off, for only the days a person normally works, in most cases Monday through Friday.
  – For Academic Personnel, Sick and Unpaid Time Offs are not available until the worker is placed on leave. Sick Time Off (days) should be entered on Monday through Friday; Sick Time Off – Weekend (days) should be entered on Saturday and Sundays. This ensures both accurate payment of sick time off and accurate accounting of the 90 calendar day entitlement of sick leave for faculty.

• The Employee or HR/Academic Partner enters Tracking Time Off, such as FMLA or Parental hours, alongside the payroll time offs. Each hour/day of Tracking Time Off should match the hour/day of payroll time off. For example, if a worker on FMLA leave of absence enters Sick Time Off for 8 hours, there should be a Tracking Time Off – FMLA for 8 hours on the same day to match.
WORKERS ON LEAVE – STANDARDIZE WORK SCHEDULE

• In the Request Leave process, the Time & Absence Initiate will receive a To Do - Standardize Work Schedule

• View the Employee’s Current Work Schedule.

• Assign a new Work Schedule if the Employee doesn’t already have a Work Schedule that reflects consistent hours Mon-Fri in accordance with the worker’s FTE
  – 100-5C8-MonTueWedThuFri (Default) or the closest 5V Schedule for FTEs less than 100%
  – Keep Work Schedule as-is for employee on LOA-Intermittent Leave (FMLA Approved), since they will be in/out of work.

• Remember to click Submit to mark the To Do as Complete, even if you don’t actually update the Work Schedule.

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WORKERS ON LEAVE—CONSISTENT TIME OFF HOURS

• In the Request Leave process, the Employee will receive a To Do – Enter Payroll Time Offs
• Employee or Time & Absence Initiate will enter **consistent** Time Off entries for every **weekday** during the Leave.
  – The consistent time off entries are required for accurate Payroll processing.
  – Example: Enter 6 Hours of Time Off Mon-Fri for 75% FTE.
  – Time Off hours may not be in alignment with what the Hours Worked would’ve been or what the daily duration hours on the Work Schedule indicate.
  – For **LOA-Intermittent Leave (FMLA Approved)**, employee should Enter Time and Request Absences (Time Off) accordingly.
Reporting Samples
REPORTING SAMPLES

- This section was added to the Appendix to provide a screenshot sampling of certain reports that the Time & Absence Initiate can run. Please visit the Workday Reports page for the most up-to-date information on Reports.
FTE/Calendar Mismatch Audit Report – R0465
# Student Hours Summary – R0348

## Table of Student Hours

<table>
<thead>
<tr>
<th>Employee</th>
<th>Employee ID</th>
<th>Full Name</th>
<th>Job Profile</th>
<th>Cost Center Hierarchy</th>
<th>Work Study</th>
<th>Week Ending</th>
<th>Training</th>
<th>Travel</th>
<th>Overtime</th>
<th>Hours Worked</th>
<th>Grand Total</th>
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<tbody>
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<td></td>
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<td>1.75</td>
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### Unapproved Time in a Pay Period – R0283

#### Start Date: 08/01/2017
#### Include Subordinate Organizations: No

<table>
<thead>
<tr>
<th>Employee Name</th>
<th>Employee ID</th>
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<th>Supervisory Organization</th>
<th>Un-Submitted Time Blocks</th>
<th>Submitted Time Blocks</th>
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</tbody>
</table>
# Reported Time Blocks – R0521

![Image of the Reported Time Blocks R0521 page](image-url)

<table>
<thead>
<tr>
<th>Date</th>
<th>In Time</th>
<th>Out Time</th>
<th>Time Entry Code</th>
<th>Comment</th>
<th>Status</th>
<th>Submitted By</th>
<th>Most Recent Submission</th>
<th>Approved Date</th>
<th>Approved By</th>
<th>Final Status</th>
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<tbody>
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<tr>
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<tr>
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</tbody>
</table>
Zero Hour Timesheets – R0408

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## Validate Time Reported Matches Weekly Scheduled Hours – R0017

### Time & Absence Initiate 120

### UNIVERSITY of WASHINGTON
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<table>
<thead>
<tr>
<th>Employee ID</th>
<th>Employee Name</th>
<th>Sum Approved Time Off Hours</th>
<th>Sum Total Approved Hours (Including Promissory)</th>
<th>Scheduled Weekly Hours</th>
<th>Sum Regular Hours Approved</th>
<th>Calculated Difference</th>
<th>Determination</th>
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Cost Overrides Done During Time Tracking – R0329
# Overtime By Employee – R0010

## Details

- **Pay Period Start Date**: 07/16/2017
- **Pay Period End Date**: 09/31/2017
- **Organization**: [Name of Organization]
- **Include Subordinate Organizations**: Yes
- **Include Managers**: Yes

## Items

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<th>Sum of Comp Time Earned</th>
<th>Sum of Overtime Hours</th>
<th>Report Effective Date and Time</th>
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Audit Holiday Taken Time Off Missing Entries – R0335
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**LOA Tracking Audit – R0490**

**UNIVERSITY of WASHINGTON**

**INTEGRATED SERVICE CENTER**