CAS/WORKDAY NOONTIME WORKSHOP

November 14, 2017

“Holidays, Winter Quarter, Workday and You”
1. Which jobs end 12/15/17?

- Run R0321 (Upcoming End Employment Dates)

- Then ask:
  - Should the job be extended?
    - If yes, then use “Job Change, Extend Job.”
  - If no, then ask:
    - Does the employee have just this one job?
      - If yes, then ask: Will employee be continuing in your department in another job?
        - If yes again, use “Change Job” and make lateral move.
        - If no, terminate employee.
    - If no, then ask: If so, is the expiring job primary or secondary?
      - If primary, contact ISC to switch primary designation, then end job. (Hint: Do this now!)
      - If secondary, simply end job.
2. Which jobs are new for Winter Quarter?

- New academic appointments?
  - Prepare necessary documentation. (See Administrative Gateway.)
  - Process new hire.
  - Ensure that new hire received, understands, and acts upon Workday’s onboarding prompts.
  - Complete I-9 processing before holiday (or ASAP after).

- New ASE appointments?
  - Send appointment letters by 11/16.
  - Process new hire (or lateral move, as appropriate)

- New student hourly appointments?
  - Process new hire (or add additional job, as appropriate)
  - Make sure to use the Hire Wizard!

- New staff appointments?
  - Begin job req and hiring processes as soon as possible.
3. Costing allocations
   • Should job be paid on default cost center?
   • Should job be paid on grant cost center? Is the grant still active?
   • Should there be some other costing override? For which dates?
   • Should PCA codes change for new quarter?
   • The following reports can help:
     • R0525: Payroll Costing by Organization
     • R0526.1: Gross Wages Comparison and Verification
     • R0431: Earnings and Actuals

4. Student Compensation
   • Should an ASE change steps (Predoctoral Instructor change; change due to academic advancement)?
   • Should hourly rates change?

5. FTE Changes?

6. Leaves of Absence?
   • Are sabbaticals properly recorded and active?
   • Do other leaves start in Winter Quarter?
   • Use R0528: Workers on Leave Audit to review
DEADLINES, 12/15 PPE

- Keep in mind - switch primary window is from 12/7-12/12

- Fall Quarter classes end 12/08/17 (and folks start to disappear for the holidays).

- Payroll calculation for 12/15/2017 PPE (e.g., the last payroll period of Fall Quarter) opens Tuesday, 12/12/2017.

- Payroll “Purple Day” deadline (a.k.a. HCM Transaction Unit Approval deadline) is 5:00 p.m. on Wednesday, 12/13/2017.

- Fall Quarter final exams end Friday, 12/15/2017 (and vacations start in earnest).

- Winter Quarter payroll starts Saturday, 12/16/2017.

- Final payroll deadline for 12/15/2017 PPE is 9:00 p.m. Monday, 12/18/2017.

- Pay Day for 12/15/17 PPE is Friday, 12/22/2017.
MORE DEADLINES, 12/31 PPE

- Keep in mind, switch primary job opens 12/20 and ends 1/2

- Campus is closed Monday, 12/25/2017.

- Payroll calculation for 12/31/17 PPE (e.g., the first payroll period of Winter Quarter) opens Thursday, 12/28/17.

- Payroll “Purple Day” deadline (a.k.a. HCM Transaction Unit Approval deadline) is 5:00 p.m. on Friday, 12/29/17.

- Campus is closed Monday, 1/1/2018.

- Additional payroll requests deadline is 1:00 p.m. on Tuesday, 1/2/2018.

- Winter Quarter classes start Wednesday, 1/3/2018.

- Final payroll deadline for 12/31/17 PPE is 9:00 p.m. on Thursday, 1/4/2018.
THINGS TO WORRY ABOUT

- No one around to pick up or receive checks on Friday, 12/22?
- Key security role holders on vacation 12/25 to 12/29?
- Inadequate time to catch and correct mistakes before deadline on 01/02.
RECOMMENDATIONS

- Run R0321 (Upcoming End Employment Dates) by Monday, 11/20; submit requests to change primary job between Monday, 11/20, and Wednesday, 11/29 (this is early, but it sets you up for a less stressful December).

- Complete all HCM Initiate 2 work for Winter Quarter by Wednesday, 12/06.

- Secure all department-level approvals in Workday by Friday, 12/08/2017 (i.e., before folks leave).

- Run R0314 (Employee Download by Organization) on 12/18 to check on status of updates. Work with your HCM Initiate 2 and the ISC to correct any errors by end of business on Friday, 12/22.

- Enjoy the break on 12/25.

- Run Earnings and Actuals by 3:00 on Thursday, 12/28. Make sure that all corrections are made by end of business on Friday, 12/29.
SCHEDULING RECOMMENDATIONS

General:

- Anticipate the issues that might arise with the first payroll calc of a new quarter and make sure you have the right security role holders in the office to address them.
- If one of your security role holders will be away, make sure that delegations are in place, but remember: delegations only cover approvals. The delegated role holder cannot initiate an action in Workday.

Specific:

- Plan staff vacations carefully. It would not be a good idea to have both your Initiate 2 and your Academic and HR Partners gone Dec 28-29.
- Make sure you have more than one Costing Allocations Coordinator for your unit (and that at least one of them is at work Dec 28-29).