



# CAS/WORKDAY NOONTIME WORKSHOP

November 14, 2017

“Holidays, Winter Quarter, Workday and You”

# QUESTIONS AND TASKS FOR WINTER QUARTER

## 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.

# MORE QUESTIONS AND TASKS FOR WINTER QUARTER

## 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.

# YET MORE QUESTIONS FOR WINTER QUARTER

## 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

| December |    |    |    |    |    |    |
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| 3        | 4  | 5  | 6  | 7  | 8  | 9  |
| 10       | 11 | 12 | 13 | 14 | 15 | 16 |
| 17       | 18 | 19 | 20 | 21 | 22 | 23 |
| 24       | 25 | 26 | 27 | 28 | 29 | 30 |
| 31       | 1  | 2  | 3  | 4  | 5  | 6  |

# 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.*

| December |    |    |    |    |    |    |
|----------|----|----|----|----|----|----|
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| 10       | 11 | 12 | 13 | 14 | 15 | 16 |
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# 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*.



| December |    |    |    |    |    |    |
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| 3        | 4  | 5  | 6  | 7  | 8  | 9  |
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# 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

| November |    |    |    |    |    |    | December |    |    |    |    |    |    |
|----------|----|----|----|----|----|----|----------|----|----|----|----|----|----|
| S        | M  | T  | W  | T  | F  | S  | S        | M  | T  | W  | T  | F  | S  |
|          |    |    | 1  | 2  | 3  | 4  |          |    |    |    |    | 1  | 2  |
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- 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

| November |    |    |    |    |    |    | December |    |    |    |    |    |    |
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| S        | M  | T  | W  | T  | F  | S  | S        | M  | T  | W  | T  | F  | S  |
|          |    |    | 1  | 2  | 3  | 4  |          |    |    |    |    | 1  | 2  |
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## 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).

# QUESTIONS?

