ADVANCED WORK SCHEDULE AND TIME TRACKING

WORKDAY TRAINING WEBINAR – NOVEMBER 2, 2017

UNIVERSITY of WASHINGTON
INTEGRATED SERVICE CENTER
WELCOME TO ADVANCED WORKDAY TRAINING

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WEBINAR WARMUP
WEBINAR TRAINING – KEYS TO SUCCESS

• All participants are on Mute.

• Use the Chat feature to ask a question. We’ll aggregate the questions and review the most common questions at the end of the session.

• Please refer back to the recording of this webinar once it is posted on the ISC Training page.
A FEW NOTES ON OUR ZOOM MEETING TOOL

The primary menu bar lets you:
– Muting/unmuting yourself – By default, all participants are set to mute.
– Sharing/not sharing your webcam.
– Chatting in questions for the webinar.
– Please do **not** record our session today. The ISC team is recording and we will post on the ISC Training page once available.
Switch your chat to privately chat to our organizers at the ISC Training account. That way we can “cull” duplicative questions more easily—and save questions we don’t get to for later!

![Chat screenshot]

**A FEW NOTES ON OUR ZOOM MEETING TOOL**
TODAY’S AGENDA

• Webinar warm-up
• Training goals
• Recap from Workday Fundamentals course
• Advanced concepts and demos
• Q&A

1. Work Schedules
   • My Team’s Schedule
   • Logging Flex Time

2. Time Tracking
   • Hours Worked-No Rounding
   • UW Alerts for Timesheets
   • Run Calculations
   • Shift Differential Calculations
CONTINUOUS LEARNING

• Informal learning...
  – Most of you already hold support roles for your Supervisory Organizations
    ▪ Time & Absence Initiate
    ▪ Time & Absence Approver

• Formal learning...
  – You have attended Workday Fundamentals course as in-person training.
  – Today’s session will review additional advanced content that tackles common questions from your units
WEBINAR POLL – RESPOND IN ZOOM

SECURITY ROLES
1. Which of the following security role(s) do you hold?
   – Time & Absence Initiate
   – Time & Absence Approver
   – Other (e.g. HR/Academic Partner, HCM Initiate 2, Costing Allocation Coordinator)

WORKDAY TRAINING
2. When did you attend Time & Absence Initiate or Time & Absence Approver Training?
   – Prior to Workday’s launch (June 27, 2017)
   – After Workday’s launch (June 27, 2017)
   – NA. I do not hold either of these security roles.
AFTER THIS COURSE I WILL...

• Recognize common mistakes and can respond to questions within my unit.

• Understand Workday functions I may need to use on an ad-hoc basis to support certain scenarios that come up in my unit.

• Share knowledge of advanced Workday concepts and best practices with colleagues.
WORK SCHEDULES & MY TEAM’S SCHEDULE
WEBINAR POLL – RESPOND IN ZOOM

ASSIGN WORK SCHEDULE

• As a Time & Absence Initiate, how comfortable do you feel in initiating the Assign Work Schedule business process?
  o 1 – Very uncomfortable. I don’t know when to initiate the business process and don’t understand its impacts to an employee’s time calculations.
  o 3 – Somewhat comfortable. I know when to initiate the business process but am sometimes not sure of its impacts to an employee’s time calculations.
  o 5 – Very comfortable. I know when to initiate the business process and fully understand its impacts to an employee’s time calculations.
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.

How many hours per day is the employee expected to work?

Time blocks (timesheets) should reflect actual hours worked.

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

How many hours did the employee work per day/week?

Did the employee earn overtime?

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.

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UPDATE WORK SCHEDULES – MY TEAM’S SCHEDULE

- Time & Absence Initiates can update Work Schedules on an **ad hoc** basis if no other worker details are changing i.e. No change in FTE, Work Shift, etc.
  - **Assign Work Schedule** for a change that spans greater than 2 weeks
  - **My Team’s Schedule** for a change that spans less than 2 weeks

- My Team’s Schedule
  - Can be used for flex schedules when daily OT calculations should still occur.
  - No validations, therefore the system will allow too many or too few hours.
  - No routing or approvals enforced (Workday delivered functionality).
DEMO – MY TEAM’S SCHEDULE

- Scenario: Employee has received approval to leave early on Monday and make up her time on Tuesday
  - Time & Absence Initiate can use My Team’s Schedule to update the daily duration hours for Monday and Tuesday
  - Allows for Daily OT Calculation to still calculate above daily duration hours.
FLEX TIME WORKED
FLEX TIME WORKED

• As an alternative to using the My Team’s Schedule functionality to update an employee’s work schedule for a given week, the Time Type **Flex Time Worked** can be logged.
  – This Time Type can be entered by the Employee or Time & Absence Initiate to reflect hours worked outside of regular work schedule to make up time.
  – Example: Employee has received approval to leave early one day and will log **Flex Time Worked** for the make up hours on another day in the same work week.

• Flex Time Worked will **prevent Daily Overtime Calculations** but still allows for Weekly FLSA Overtime Calculations.
DEMO – FLEX TIME WORKED

- Scenario: Employee has received approval to leave early on Monday and make up her time on Tuesday
  - Employee or Time & Absence Initiate can select the time type: **Flex Time Worked** to record the time she is working to make up from the previous day and prevent Daily OT Calculations.
TIME TRACKING – TIME TYPES
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>
HOURS WORKED—NO ROUNDERING

- Hours Worked-No Rounding is a limited Time Type that can only be entered by Time & Absence Initiates.

- This Time Type can be used to true-up time entry for employees whose hours worked don’t align with the 15 minute rounding increments.
  - Example: A part-time employee requires a true-up of their total reported hours during a holiday week.
DEMO– HOURS WORKED – NO ROUNding

• Example: 80% FTE has 6.4 hours of Holiday Taken Time Off and is working the remainder of the week
• 0.1 Hours Worked – No Rounding is needed to account for 32 hours in the week on his time sheet.
UW ALERTS FOR TIMESHEETS
UW ALERTS FOR TIMESHEETS

• Since August, we’ve implemented a new process that will send direct emails in the scenarios below.

• Initial email alerts are automatically sent on the 1\textsuperscript{st} and 16\textsuperscript{th} of the month. A second set of alerts is sent 1-2 business days before the Payroll Lock Date.

<table>
<thead>
<tr>
<th>Alert</th>
<th>Sent To</th>
<th>Additional Considerations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Timesheet Not Created</td>
<td>Employee</td>
<td></td>
</tr>
<tr>
<td>• No hours entered for the pay period</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Timesheet Not Submitted</td>
<td>Employee</td>
<td></td>
</tr>
<tr>
<td>• Hours for the pay period have been entered, but not submitted</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Timesheet Not Approved</td>
<td>Time &amp; Absence Approver</td>
<td>In scenarios where an employee has multiple positions, if one position meets the criteria, the alert is sent to Time &amp; Absence approvers for all positions.</td>
</tr>
<tr>
<td>• Hours for the pay period have been submitted, but not approved</td>
<td></td>
<td>• Additional Details in ISC News (10/11/17): Clarification: “Timesheet Not Approved” Emails</td>
</tr>
</tbody>
</table>
RUN CALCULATIONS
WEBINAR POLL – RESPOND IN ZOOM

RUN CALCULATIONS

• As a Time & Absence Initiate, how comfortable do you feel in utilizing the Run Calculations functionality in the Enter Time business process?
  
  o 1 – Very uncomfortable. I don’t know when to use Run Calculations and am not aware of its impacts to an employee’s reported time blocks.
  
  o 3 – Somewhat comfortable. I am aware of some instances to use Run Calculations and I somewhat understand its impacts to an employee’s reported time blocks.
  
  o 5 - Very comfortable. I know when to use Run Calculations and fully understand its impacts to an employee’s reported time blocks.
RUN CALCULATIONS

• Each time an entry is made in the Enter Time process, Workday automatically calculates the time blocks for the week.

• When time for the week has already been entered, **Run Calculations** can be used to force Workday to re-calculate. Examples of scenarios warranting this function include:
  – Changes to worker data as a result of upstream business processes (e.g. Change in FTE, Work Shift, Position, Work Schedule Assignment)
  – Time Off entries
  – Application break/fixes or configuration changes
DEMO – RUN CALCULATIONS

- Example: 100% FTE had a retro Work Schedule Assignment change effective, 10/16/2017. Time for the Week was already entered/calculated.
  - Employee changed from 5 days to 4 days/week.
  - Workday calculates O/T based on the employee’s work schedule at the time the blocks were entered.

- Once the Work Schedule is updated, go back to the timesheet to Run Calculations.
  - Status of Impacted time blocks updates from Submitted or Approved to Not Submitted
RUN CALCULATIONS (CONTINUED)

- The Employee and Time and Absence Initiate have the ability to use Run Calculations.
  - Available via the Enter Time button at the bottom left of the screen for the Enter Time process.

- If the Run Calculations function results in updated time calculations, Workday will update the time block status to **Not Submitted**.

- When using Run Calculations to correct time calculations associated with an Overpayment or Underpayment, remember that the timesheets will need to be approved by the Payroll Lock Date in order for the retro processing to be reflected in the next paycheck.
WEBINAR POLL – RESPOND IN ZOOM

SHIFT DIFFERENTIAL

• Do you support employees who are eligible for and receive shift differential pay?
  o Yes, I support employees who are eligible for and receive shift differential pay.
  o No, I do not support employees who are eligible for and receive shift differential pay.
  o I’m not sure.
SHIFT DIFFERENTIAL CALCULATIONS

• Shift differential is automatically calculated in Workday and refers to premium pay for an eligible employee who works within a specific time frame.

• The time of day that an eligible employee qualifies for shift differential varies. See labor contracts for details.
  – Example: For SEIU 925 (not Research Tech nor Research Tech Supervisors)
    ▪ Evening Shift (5pm-12am)
    ▪ Night Shift (12am-7am)
    ▪ Negotiated Shift (5pm-7am)
SHIFT DIFFERENTIAL CALCULATIONS – WORK SHIFT

• The employee’s **Work Shift** (assigned by the HCM Initiate 2) will also drive shift differential calculations for an eligible worker.

  1. **Non-Permanent Work Shift:** When an eligible employee is assigned to a non-permanent work shift, if the **majority of hours worked in a day or in the week** qualify for shift differential, then all hours worked in the day or week receive shift pay.
     - Time blocks will assess Shift Differential Time Calculation tags and hours will display as Premium Hours in the Enter Time process.

  2. **Permanent Work Shift:** When an eligible employee is assigned to a **Permanent Work Shift**, the applicable shift differential is automatically applied by Payroll, in accordance with the employee’s **Regular Hours in the Work Period** (prorated by FTE), less any Unpaid Time Off.
     - Permanent Work Shift hours will not display as Time Calculation Tags nor Premium Hours in the Enter time process.
Scenario – Employee earns Daily Shift Differential for Majority Hours Worked

- 100% FTE Contract Classified employee is assigned to the First Shift. Per her job classification and bargaining contract, she is eligible for Negotiated Shift (5pm-7am)
- On Monday, the employee worked 5 hours within the negotiated shift window (5pm-7am). This is the majority of hours worked in the day, therefore all hours for that day are calculated as Negotiated Shift
DEMO – SHIFT DIFFERENTIAL CALCULATIONS

• Scenario – Employee earns Weekly Shift Differential for Majority Hours Worked
  – 100% FTE Contract Classified employee is assigned to the First Shift. Per her job classifications and bargaining contract, she is eligible for Negotiated Shift (5pm-7am)
  – For the week, the employee worked 21 hours within the negotiated shift window (5pm-7am). This is the majority of hours worked therefore, all hours for the week are calculated as Negotiated Shift.
SHIFT DIFFERENTIAL CALCULATIONS

• Example: 100% FTE employee assigned to the work shift: **Permanent Negotiated Shift.** His *Shift Premium* for the Pay Period is based on these hours:
  – Regular Earnings
  – UW Holiday
  – Holiday Credit Used
  – Comp Time Used

![Shift Premium Calculation Table](image)

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QUESTIONS?
WEBINAR Q & A

• Use the Chat feature to ask a question. We’ll aggregate the questions and review the most common questions.
RESOURCES

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

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

• 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
WHAT’S NEXT?

• Please complete the Post-Webinar Survey. A post-webinar email will be sent from the ISC Training mailbox with the links to this survey, the recording, and materials from today’s webinar.

• For those of you registered, stay tuned for the Outlook invite for next week’s Advanced Absence Webinar.
  – Thursday, November 9: Advanced Absence – Leaves & Time Off in Workday

• Remember, you can always re-attend or review materials from the Workday Fundamentals for Time & Absence Initiate Training
THANK YOU