TOPICS

- TEF Questionnaire Best Practices – Alana Miller
- Time and Absence report enhancements – Tram Le/Lei Robinson
- Employee Sub-Type Decision Tree – Francisco Pacheco
- Restricted Entry Periods Associated with Merit and Unit Adjustment Process – Paula Ross
- Named Support Contact Resources – Kanani Donaldson
- Q&A
TEF QUESTIONNAIRE
TEF QUESTIONS – HOW TO ANSWER

> Is the employee expected to work an average of 80/hours a month (with a minimum of 8 hours per month) for more than 6 consecutive calendar months (e.g. total of 480 hours in 6 consecutive months)? If yes, Workday must reflect the appropriate appointment duration.

  – If the answer is “yes,” the employee receives employer paid basic insurance coverage. Temporary employees are eligible for insurance administered by PEBB.
TEF QUESTIONS – HOW TO ANSWER

> Will the employee be working a minimum of 70 hours per month, in 5 out of the next 12 rolling calendar months?
  – If the answer is “yes,” the employee participates in the PERS retirement system.
TEF QUESTIONS – HOW TO ANSWER

> Is the employee replacing an individual who worked at least 70 hours per month, for 5 out of the last 12 months? Or is this a Medical Centers’ employee?
  – If the answer is “yes,” the employee participates in the PERS retirement system.
**TEF QUESTIONS – IMPACT TO EMPLOYEES**

> If a TEF question is responded to as “yes” –
  > Employee records will be reviewed manually by a Benefits Specialist.
  > After review, employees will be sent an email notification to their UW email with next steps and instructions on how to enroll through Workday.

> Employees should monitor emails from Workday and **take action** accordingly
  > Failure to submit an enrollment in Workday by the deadline (including accompanying dependent documentation, if applicable) will result in defaulting to the plans required by PEBB and/or DRS rules:
    > PEBB coverage: Employee only enrollment in Uniform Medical Plan (UMP) Classic, Uniform Dental Plan (UDP), and basic life and LTD insurance. Employees also will be charged the monthly tobacco use premium surcharge.
    > DRS: PERS 3 retirement plan participation at Option A 5%.

> Employees should contact the ISC at ischelp@uw.edu with questions about enrollment notices from Workday.
TEF QUESTIONS: RESOURCES

> TEF User Guide: https://isc.uw.edu/user-guides/tef_questionnaire/
REPORT ENHANCEMENTS
NEW WORKDAY REPORTS HOME PAGE

Home page redesign:
https://isc.uw.edu/admin-corner/workday-reports/

Payroll-Impacting Reports by Deadline:
https://isc.uw.edu/admin-corner/workday-reports/payroll-impacting-reports-by-deadline/

Payroll-Impacting Reports by Security Role:
https://isc.uw.edu/admin-corner/workday-reports/payroll-impacting-reports-by-security-role/
T&A REPORT ENHANCEMENTS

> Introduction of a primary time entry auditing report
  – Summarized Time Tracking Audit (R0521), previously Summarized Worker Hours
    > Lots of improvements, name change, pop-out detail
  – Detailed Time Tracking Audit (R0521.1), previously Reported Time Blocks
    > Name change

> Tweaks and improvements to:
  – Zero Hour Timesheets (R0408)
  – Time Off and Leave Transactions Awaiting Approval (R0500)
  – Workers on Leave (LOA) Audit: Tracking, Paid, or Unpaid Time Off (R0032)
T&A REPORT ENHANCEMENTS

> With changes, we can now deprecate:
  – Unapproved time in a pay period
  – Workers Returned From Leave
  – Workers Returning from Leave
TIME TRACKING AUDITS (R0521 & .1)

> Name changes and number swaps:
  – Previously Summarized Worker Hours R0521.1, now **Summarized Time Tracking Audit R0521**
  – Previously Reported Time Blocks R0521, now **Detailed Time Tracking Audit R0521.1**

> Redesign on Summarized Time Tracking Audit
  – Added totaling columns to allow for easier scanning of unsubmitted/unapproved time
  – If a number is clicked, all details can be seen about those time blocks, including:
    > Time calculation tags (OT, Comp Time, Reg time, etc.)
    > Coordinated Time Off entries (in case of overlapping entry)
    > Time block overrides (cost center, project, task, option)
  – **Important:** still need to run Zero Hour Timesheets R0408 to catch empty timesheets

> No large changes on R0521.1
  – Still the same report with a different name/number, see above
## Summarized Time Tracking Audit R0521

**Start Date:** 03/01/2018  
**End Date:** 03/15/2018

Include Subordinate Organizations: Yes

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R0500

- Name change
  - Previously Business Process Transactions Awaiting Action - Absence Focused, now **Time Off and Leave Transactions Awaiting Approval** R0500
- Added sup org
- Removed unnecessary columns
- Altered columns headers for better readability
- Simplified dates in prompt
- Added relevant security roles and their NetId’s for mass follow-up via email
## Time Off and Leave Transactions Awaiting Approval R0500 - WIP

### Business Processes
- Correct Time Off
- Request Leave of Absence
- Request Return from Leave of Absence
- Request Time Off

### Include Subordinate Organizations
Yes

### Time Off and Leave Transactions on or After
03/01/2018

### Supervisory Organization

### 4 Items

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<th>Business Process Name</th>
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<th>Initiated For</th>
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R0032- WORKERS ON LEAVE AUDIT

- Much more thorough instructions added on report side to help with readability
### Workers on Leave (LOA) Audit - Tracking, Paid, or Unpaid Time Off R0032

**Organizations**

- Includes subordinate organizations: Yes

**Start Date** 03/01/2018  
**End Date** 03/15/2018

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<th>Actual Last Day of Leave</th>
<th>Total Tracking Time Off</th>
<th>Total Paid Time Off</th>
<th>Total Unpaid Time Off</th>
<th>Total Tracking Time Off Less Paid/Unpaid Time Off</th>
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| (On Leave) |             | 03/01/2018 | Becoming a Parent > LOA - Becoming a Parent Leave (FMLA Approved)  
Other > LOA - Shared Leave of Absence | 02/28/2018 | 06/27/2018 | (Blank) | 16 | 8 | 0 | 8 |
| (On Leave) |             | 03/02/2018 | Becoming a Parent > LOA - Becoming a Parent Leave (FMLA Approved)  
Other > LOA - Shared Leave of Absence | 02/28/2018 | 06/27/2018 | (Blank) | 16 | 8 | 0 | 8 |
| (On Leave) |             | 03/05/2018 | Becoming a Parent > LOA - Becoming a Parent Leave (FMLA Approved)  
Other > LOA - Shared Leave of Absence | 02/28/2018 | 06/27/2018 | (Blank) | 16 | 8 | 0 | 8 |
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R0408- ZERO HOUR TIMESHEETS

> Much more thorough instructions added on report side to help with readability
> Removed unnecessary columns
> Added NetId for follow-up
### Zero Hour Timesheets R0408 - WIP

#### Start Date: 03/01/2018

#### End Date: 03/15/2018

Include Subordinate Organizations: Yes

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EMPLOYEE SUB-TYPE DECISION TREE
OVERVIEW

> Employee Sub-Type Definition and Overview
> Employee Sub-Type by Population
> Employee Sub-Type Quick Tips
EMPLOYEE SUB-TYPE DEFINITION AND OVERVIEW
Employee sub-type is foundational to understanding the different ways workers are defined in Workday.

Employee sub-types delineate between workers in each employee type (employee or contingent worker).

- Employee sub-types are assigned per position of the worker, NOT PER WORKER, for those individuals holding more than one position.

Employee sub-types help designate between permanent employees and those with limited-term relationships that have anticipated end dates and those who are paid and not paid by the university.
When an employee is setup incorrectly, this directly impacts:

- **Benefits**: employees may be enrolled in the wrong benefit group resulting in more or less benefits than mandated by the state
- **Time Tracking Setup**: employees may be prevented from entering time (impacting pay) or may have the ability to enter hours and while being paid a base salary for the same position
- **Payroll**: incorrect pay and/or benefits will result in overpayment/underpayment scenarios and may potentially impact W-2 reporting and payroll accounting
- **Downstream systems**: incorrect employee setup may cause degradation in the data reported to state agencies or UW internal systems
EMPLOYEE SUB-TYPE

WHAT ARE THE IMPACTS?

> Incorrect data setup then requires audit review, manual clean-up, and administrative overhead to adjust employee records manually. This also may result in a poor employee experience.

> Time making corrections involves:

<table>
<thead>
<tr>
<th>Unit</th>
<th>Med Ctrs. WMS</th>
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<tbody>
<tr>
<td>ISC Tier 2 HCM</td>
<td>CBU Benefits</td>
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<tr>
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<td>CBU Employment</td>
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<tr>
<td>ISC Tier 2 Payroll</td>
<td>Downstream solutions</td>
</tr>
<tr>
<td>ISC Tier 3 Application Mgmt.</td>
<td>State agencies</td>
</tr>
</tbody>
</table>
EMPLOYEE SUB-TYPE BY POPULATION
STAFFING MODELS – REFRESHER

BY POPULATION

> Position Management
  – All staff including UW Medical Centers
  – Academic
    > Indefinite and Multi-Year
    > Librarians
  – Contingent Workers – Managers

> Job Management
  – Students
  – Academic (short-term)
    > Academic Staff
    > Educators
    > Extension Lecturers
    > Faculty (Annual or shorter)
    > Medical Residents/Fellows
    > Senior Fellows/Trainees
  – Contingent Workers
EMPLOYEE SUB-TYPE BY GROUP

ACADEMIC EMPLOYEE SUB-TYPE

> The following sub-types can be used for academic positions;
  
  – Position Management
    > Regular
    > Regular Practice Plan (for School of Medicine Only)
    > Fixed Term Practice Plan (Fixed Term)
    > Fixed Term (Fixed Term)
  
  – Job Management
    > Temporary (Fixed Term)
    > Fixed Term (Fixed Term)
    > Fixed Term Practice Plan (Fixed Term)
Worker Type and Sup-Type Decision Tree

Go to isc.uw.edu
• Click on Admin’s Corner
• Click on Self-Service Resources for Administrators
• Click on Worker Type and Sub-Type Decision Trees

Or

Follow this link: https://isc.uw.edu/admin-corner/self-svc/worker-type-and-sub-type-decision-trees/#1-uw-funded-faculty
The following sub-types can be used for staff:

- Salaried
  - Regular (workers without an employment end date)
  - Fixed Term (Fixed Term)
  - Fixed Duration LOA (Fixed Term)
  - Fixed Duration Project (Fixed Term)
- Hourly
  - Temporary (Fixed Term)
    - This includes fee based assignments
Worker Type and Sup-Type Decision Tree

Go to isc.uw.edu
- Click on Admin’s Corner
- Click on Self-Service Resources for Administrators
- Click on Worker Type and Sub-Type Decision Trees

Or

Follow this link:
https://isc.uw.edu/admin-corner/self-svc/worker-type-and-sub-type-decision-trees/#2 uw-funded-staff
The following sub-types can be used for students:

- **Stipend**
  - Fixed Term (Fixed Term)

- **Graduate Student**
  - Fixed Term (Fixed Term) – if paid salaried
  - Temporary (Fixed Term) – if paid hourly

- **Undergraduate Student**
  - Temporary (Fixed Term) – always paid hourly
Worker Type and Sup-Type Decision Tree

Go to isc.uw.edu
• Click on Admin’s Corner
• Click on Self-Service Resources for Administrators
• Click on Worker Type and Sub-Type Decision Trees

Or

Follow this link: https://isc.uw.edu/admin-corner/self-svc/worker-type-and-sub-type-decision-trees/#3-uw-funded-student
Worker Type and Sup-Type Decision Tree

Go to isc.uw.edu
• Click on Admin’s Corner
• Click on Self-Service Resources for Administrators
• Click on Worker Type and Sub-Type Decision Trees

Or

Follow this link:
https://isc.uw.edu/admin-corner/self-svc/worker-type-and-sub-type-decision-trees/#5-contingent-worker-or-unpaid-academic-affiliate
EMPLOYEE SUB-TYPE BY GROUP

RETIREE EMPLOYEE SUB-TYPES

- Retiree setup is undergoing a re-design, which will impact the set up of retirees going forward
- Until retiree setup is confirmed, business as usual
EMPLOYEE SUB-TYPE QUICK TIPS
EMPLOYEE SUB-TYPE

QUICK TIPS

> If ‘H’ exists in the job profile name, indicating the job is hourly, then the employee should be setup as ‘Temporary (Fixed Term)’
  – Example: Student Assistant (NE H)

> If employee is in a fee based assignment job profile (11861), then the employee should be setup as ‘Temporary (Fixed Term)’

> If the employee is setup in a Job Management sup org, they should never be setup as ‘Regular’

> If a PDR worker is also paid by UW, ensure they have two positions and respective employee sub-types
  – One paid by UW and the other paid by PDR
  – This will ensure the employee has the correct benefits assessment
  – The UW position will be ‘Primary’
MERIT AND UNIT ADJUSTMENTS
The following were emailed to administrators on May 19, 2018:

> FY19 Merit and Faculty Unit Adjustment Process Guide [updated May 31, 2018]

> FY19 Frequently Asked Questions (FAQs), which are referenced in the FY19 Merit Process Guide
NAMED SUPPORT CONTACTS

RESOURCES
ISC SUPPORT PATH

ISC SUPPORT PATH

Dedicated space within Admin’s Corner

<table>
<thead>
<tr>
<th>Campus Engagement</th>
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<tbody>
<tr>
<td>• Unit Change Leads (formerly Readiness Leads)</td>
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<tr>
<td>• Readiness Leads Meeting Presentations</td>
</tr>
<tr>
<td>◦ August 17, 2017 (PDF)</td>
</tr>
<tr>
<td>• HRPM Administrative Network Meeting Presentations</td>
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<td>◦ August 3, 2017</td>
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<tr>
<td>◦ September 7, 2017 (PDF)</td>
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<td>• HR Administrators’ Forum Presentations</td>
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<td>◦ November 16, 2017 (PDF)</td>
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<td>◦ January 18, 2018 (PDF)</td>
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<td>◦ March 15, 2018 (PDF)</td>
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<tr>
<td>◦ May 17, 2018 (PDF)</td>
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<tr>
<td>• NSC Network Meeting Presentations</td>
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<td>◦ February 2018 (PDF)</td>
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<td>◦ April 2018 (PDF)</td>
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<td>◦ May 2018 (PDF)</td>
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QUESTION AND ANSWER

TEF Questionnaire

Q: I have an employee who is a UW retiree who was hired through temp services. Her insurance changed, which she did not want. Utemp did not tell her that. And what is the timeframe to correct answers to the TEF questionnaire?

A: If an employee becomes benefits eligible through UW, they do have to switch. You cannot waive out of UW PEBB insurance. Contact the ISC at ischelp@uw.edu for assistance so the ISC can help make the switch as smooth as possible.

Q: Should we put something specific in the subject of the ticket to make it easier to identify it is regarding a TEF issue, or about benefits?

A: Please mention ‘Retiree: Newly eligible for benefits
Q: Regarding the previous question, is that the case for faculty who are part-time? Could they lose their ‘Apple Health’?

A: Yes, it works the same for part-time faculty who gain eligibility. They cannot waive out of UW PEBB insurance and may have to switch their insurance. The employee can contact Apple Health with questions about switching.

Q: What if a worker’s schedule changes once they start and it impacts what the answers were on the TEF? And now the answers are incorrect?

A: If their schedule changes and they’re working more hours, departments cannot correct TEF in Workday. Email the ISC at ischelp@uw.edu and we can walk you through it, with more accurate responses prospectively.
TEF Questionnaire

Q: If the employee leaves before 6 months, will the coverage end?
A: Yes, the PEBB coverage will end if they are separated and/or at the end of the month in which they have 8 hours of pay status.

Q: We have staff that on call. We cannot say they will work 70 hours in any given period. Is it best to answer ‘Yes’?
A: Answer based on the best of your understanding. We do monitor employees work patterns, and if the employee meets the eligibility requirements, we’ll notify the employee. You are the best person to answer the TEF based on what you think their work schedule will be.
Report Enhancements

Q: Do we lose our search engine capability to search for reports?
A: No, the search function will still work within Workday and the ISC web site.

Q: When are these reports going to be rolled out?
A: In the next 1-2 weeks. We will communicate this on the ISC web site and in the Weekly Digest.

Q: Is there a document that will provide campus some guidelines as to best practices? When to run reports, what should I be looking for, etc.?
A: We do not want to give any ‘blanket’ guidance because it may not work for all departments. The newly structured report sites provide the guidance to help departments figure out when to run reports, what is payroll impacting, reports that are useful by security role, etc.
QUESTION AND ANSWER

Report Enhancements

Q: There isn’t any indicator in these reports to show if time was entered retroactively. How are we supposed to know?

A: You can run the report for date ranges in the past to show when time was entered. This should be done occasionally to see when time has been entered retroactively. For pay period reconciliation, we recommend you it with the start and end dates for the current pay period. You should consider running it for previous pay periods as well to reconcile. Workday will not tell you when time was entered. That is why it’s important to run the reports for previous periods.

Q: What do you audit for when someone is terminated?

A: Same attributes as in OWLS. You will be looking for time that has been submitted, approved/not approved, etc. You’re auditing for ‘in-flight’ actions, like holiday time, vacations, etc.
Report Enhancements

Q: In OWLS we had documentation what was being done regarding time and documented in the timesheet. Now, we would have to reach out to all supervisors to send all documentation to me regarding the time off? Do I tell supervisors to hold on to all documentation for a year. What is the best practice?

A: The ISC fully acknowledges this is a ‘brave new world’. You don't have the same documentation as before. You're now asking supervisors to be responsible for their employees. Supervisors are responsible to make sure their employees are entering their time. You're looking for discrepancies. For instance, no holiday time taken in the system when there should be. You need to be looking for things to hold your supervisors accountable. It's not your responsibility to keep track of time anymore. The ISC can provide general guidance about holding supervisors accountable, but we can't dictate it. It's up to individual departments to decide how to handle that.
REPORT ENHANCEMENTS

Q: Is there a way to identify if they're on intermittent or FMLA leave? Can you make the comment required to indicate what type of time they're taking?
A: Great idea, but not sure if we can make it required. Will take it back to Workday for consideration.

Q: Why is it an HCMI2 cannot enter leave? What is the logic?
A: It's a security role issue. It's a business rule, only Academic Partners and HR Partners can make the transaction for the leave. It's working as designed.
Merit and Unit Adjustments

Q: Does the restricted period include FTE changes as well?
A: No, FTE changes are not included. FTE prorates the base pay, it doesn't change it. You can do FTE changes up to 9/1. The effective date for the FTE change has to be prior to 9/1.

Q: We had an issue with doing a summer FTE change, effective 9/1 – 9/15. Why?
A: Since the effective date is 9/1, Workday is configured to not allow that change. Those business processes will have to be entered after the restricted period. If the effective date is PRIOR to 9/1, it will process as normal.
Merit and Unit Adjustments

Q: Will job changes be restricted for only employees eligible for merit?
A: Yes, employees who are not eligible for merit you can transact on.

Q: What about 9/1 terminations?
A: We recommend to not enter in terminations too early, but you can enter terminations that are effective AFTER 9/1 and it will NOT impact merit.
Employee Sub-Type

Q: Why is the employee sub-type being discussed now? Are there still issues?

A: While it’s always a good idea to have refreshers, it is also because we are still seeing errors in job profile and employee sub-type mismatches. Currently, there are over 1200 employees that are mismatched. As part of the data integrity project, the ISC is working to have these corrected by running audits. Also, as part of this effort, is finding opportunities to remind/educate campus on the impacts of having the incorrect employee sub-type on the position.