FEBRUARY NSC NETWORK MEETING
TOPICS

› Payroll Back to Basics
› TPI/TSI Best Practices
› Helpful Hints for Submitting Tickets to the ISC
› Data Integrity Strategy & Alignment
› Academic Title Changes
› Workday 32 Updates
› Optional LTD Overview
› Weekly Digest Survey
› Training Updates
KICK-OFF

NANCY JAGGER

UNIVERSITY of WASHINGTON
INTEGRATED SERVICE CENTER
ISC ADVISORY COUNCIL

Purpose: A partnership between ISC leadership, unit leaders and business partners (HR and AP) to identify and prioritize Workday and ISC optimization recommendations

Customer Council Members:
- College of Arts and Sciences
- College of Engineering
- College of the Environment
- Facilities
- Minority Affairs
- School of Medicine
- School of Social Work
- UW Bothell
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<th>WE HEARD YOU</th>
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<tr>
<td><strong>Business Process Improvements</strong></td>
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<td>• Removal of approval steps in certain Business Processes for students</td>
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<td>• Ability to Move Worker for students</td>
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<td><strong>Workday Report Enhancements</strong></td>
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<td>• New suite of Earning and Actuals reports based on user focus groups</td>
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<td>• Enhanced time and leave of absence reports</td>
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<td><strong>ISC website improvements</strong></td>
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<td>• Launched ‘Your Tasks this Month’, Search functionality, Admin’s Corner redesign</td>
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<td><strong>Yearly Events Improvements</strong></td>
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<td>• Summer Hiatus process and Open Enrollment</td>
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<td><strong>Training Improvements</strong></td>
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<td>• Transition to Population based training and launch of new eLearning modules</td>
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### BUSINESS PROCESS IMPROVEMENTS

| Removed the ISC approval steps from Hire, Change Job, & Add Job business processes for Graduate Fellows and Trainee Stipend students | ✔ |
| Removed Additional Approver Step from Request Comp Change and Period Activity Pay business processes for Students | ✔ |
| Implemented campus ability to Move Worker for Students | ✔ |
| Updated ‘Best Practices’ guidelines to show hourly student employees who will be returning to their same job after a break, will not need to be terminated. Units can choose to extend the End Employment Date and Compensation Actual End Date to keep them active in Workday | ✔ |
## Workday Reports and Annual Events

| Workday Reports and Annual Events Improvements |  
|------------------------------------------------|---|
| Launched a new suite of Earnings and Actuals reports based on feedback from a series of focus groups | ✓ |
| Introduced new time entry auditing reports and improvements to existing leave reports | ✓ |
| Summer Hiatus – experienced fewer issues with mass placing/returning of employees on Summer Hiatus from the previous year | ✓ |
| Open Enrollment – Changes and improvements based on previous year, added ability to see enrollment choices in Workday, improved communications and support to special groups | ✓ |
# ISC WEBSITE AND TRAINING

<table>
<thead>
<tr>
<th>ISC WEBSITE AND TRAINING IMPROVEMENTS</th>
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<tr>
<td>Launched ‘Your Tasks this Month’, a monthly series of Workday-specific tips, best practices, and timely reminders</td>
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<td>New search function capability to easily search terms in user guides</td>
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<td>Admin’s Corner redesign putting monthly tasks ‘front and center’</td>
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<td>Transition to Population based training, providing more information based on the populations you support as it pertains to your security role</td>
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<td>Implemented eLearning modules for Workday Fundamentals and Supporting Students entirely self-paced and online</td>
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# Payroll Calendar

## 2019 Campus Payroll and HCM Calendar

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- **Bank/UW Holidays**
- **Switch Primary Job Window opens (ISC responsibility)**
- **Switch Primary Job Window closes when Pay Calculation begins after 5:00 PM (ISC responsibility)**
- **Earnings and Actuals Reports available next day**
- **HCM Transaction Unit Approval Deadline**
- **Additional Payroll Requests Deadline (1:00 PM) - All retropay, overpayment, payroll deduction, and foreign national paperwork must be received**
- **Time and Absence Transaction Deadline (9:00 PM) - Transactions must be submitted and approved for payment**
- **Costing Allocations Deadline (9:00 AM), Payroll processing - Final Pay Calculation (ISC only)**
- **Payday**

_Alast modified on 11/19/2018_
PAYROLL CALENDAR – CONTD.

IMPORTANT DATES

– HCM Transactions
– Payroll Request Deadline
– Timesheet and Absence Transaction Deadline
– Final Cutoff - Payroll Processing (no longer a nightly process)
RETRO PAYMENTS

WHAT THEY ARE

> Workday allows for processes such as hires and compensation changes to be entered retroactively. These changes often result in retroactive payment owed to an employee, which may require manual processing.

> Causes:
  – Compensation changes
  – FTE increases
  – Correction to employee’s timesheet; additional or late hours reported
  – Period Activity Pay
ON-DEMAND PAYMENTS

WHAT THEY ARE

A manually produced check payroll writes upon department request when an employee is underpaid

> On-demand checks can only be issued once error or missing entries/transactions are corrected and approved in Workday
> Submit a separate UWConnect ticket for on-demand payments (one employee per ticket) with all required information
> Must meet criteria for check (see ISC website)
ON-DEMAND PAYMENTS – CONTD.

CAUSES

> Hours not submitted by the employee
> Hours not approved by supervisor/manager
> Retro hires
> Late entry of FTE increases
> Position extension not processed in a timely manner
> Period Activity pay processed incorrectly
TIMESHEETS

REVIEWING TIMESHEETS FOR ACCURACY PRIOR TO APPROVAL

– Has unpaid time off been recorded such as leave without pay?
– Were other time offs recorded such as vacation and sick leave?
– Did the employee work the time recorded?
– If the pay period includes a holiday was the time recorded correctly as Holiday Time Taken unless the employee worked the holiday?

> Has the employee submitted their time?
> Was the timesheet approved by Time and Absence Transaction Deadlines?
> If an approver (manager or supervisor) is out of the office, has their authority to approval timesheets been delegated? Are Time and Absence Approvers aware of payroll deadlines and available reports for review?
> Departments can set internal deadlines for employees to submit their timesheets allowing approvers time to review and approve.
OVERPAYMENTS

WHAT THEY ARE

> An employees is paid for hours that they did not work or is paid at an incorrect rate.

> **Trends:**
  > – Some overpayment spanning multiple pay periods. Some have exceeded 6 or more pay periods.
  > – Departments electing payment plans over reversals
  > – Incomplete paperwork: specific error reason required

> First 18 months in Workday: $3.5 million in overpayments.

> Best way to resolve an overpayment is through a direct deposit reversal. Avoids net calculations and overpayment forms.
OVERPAYMENTS – CONTD.

CAUSES (TOP 5)

> Leave of Absence (late or absent entry)
> Late Termination
> FTE (late reduction or wrong FTE)
> Compensation (end date incorrect, wrong comp plan)
> Position: wrong employee subtype, duplicate position entries, changes to start date, other data errors
NEW OVERPAYMENT FORMS

ISC WEBSITE

> Overpayment Worksheet
  > https://isc.uw.edu/overpayment_worksheet/

> Notification for Terminated Employees/On Leave

> Notification for Active Employees
PAYROLL ERRORS

COMMON ERRORS

> Unpaid time off (weekend)
> No compensation plan; extending employment end date without extending compensation
> Retro transactions creating overpayments (late termination, leave without payment, FTE reductions)
> Retro change to timesheets (late LWO, changes to time blocks, change to leave types, etc.)
PREVENTING ERRORS

> Shift from a corrective to a preventative mindset (OPUS versus Workday)
  > Transition from old practices
> Run, review, and make corrections based on payroll reports
  > Payroll Impacting Reports by Deadline: (https://isc.uw.edu/admin-corner/workday-reports/payroll-impacting-reports-by-deadline/)
> Hold time and absence approvers accountable or assign back ups
ADDRESSES MATTER IN WORKDAY

- State Taxes
- Benefits
- Overpayment notifications
- Mailing of paper checks if employee is not enrolled in direct deposit
- Tax forms
TEMPORARY SALARY INCREASE & TEMPORARY PAY INCREASE

CHRIS PIERCE
JEAN SWARM

UNIVERSITY of WASHINGTON
INTEGRATED SERVICE CENTER
TEMPORARY SALARY INCREASE PLAN

- Eligible Populations
  - All salaried classified staff positions
  - All salaried OT-eligible professional staff positions

- Must be for higher level duties

- Must be for a temporary assignment only

- Entered as an Additional Salary Plan
  - Request Compensation Change>Additional Salary Plan,
  - Then Additional Salary Plan>Add Temporary Salary Increase Plan
TEMPORARY SALARY INCREASE PLAN
TEMPORARY SALARY INCREASE PLAN

Salary

Assignment Details
5,951.00 USD Monthly

Plan Name
General Salary Plan

Effective Date
09/01/2018

Add
TEMPORARY PAY INCREASE

> Eligible Populations
  – All salaried exempt professional staff positions
> Must be for a temporary assignment
> Entered as an allowance
  – Request Compensation Change>Allowance Change,
  – then Allowance Change>Add Temporary Pay Increase
TEMPORARY PAY INCREASE
TEMPORARY PAY INCREASE

**Hourly**
- Add

**Unit Salary**
- Add

**Allowance**
- Add
TSI/TPI GUIDELINES

TEMPORARY SALARY INCREASE (TSI)

> Justification needs to identify the higher level duties
> Time period needs to align with the contract/civil service rules
> The total salary (General Salary Plan + Temporary Salary Increase Plan) needs to be on a step that is reflected in the pay table (classified populations only)

TEMPORARY PAY INCREASE (TPI)

> Justification needs to include the assigned duties, whether higher level or additional
> Minimum increase is at least 5%
> Duration
  – Minimum of 10 days
  – Maximum of 12 months
HELPFUL HINTS

DO NOT ADD THE TEMPORARY INCREASE TO THE GENERAL SALARY PLAN

When TPI is added to General Salary Plan, TOTAL compensation will be lost on actual end date!
HELPFUL HINTS

TEMPORARY PAY SHOULD ALWAYS SHOW AS A SEPARATE LINE ITEM

When entered correctly, there will be two line items, one for the General Salary and one for the TPI/TSI.
HELPFUL HINTS

VIDEO TUTORIALS

> ISC.UW.EDU>Request Compensation Video>Allowances
   – Demonstrates an ADS Allowance
     > In practice, select add allowance>add temporary pay increase

> ISC.UW.EDU>Request Compensation Video>Temporary Salary Increase
ISC TICKETS

> Submit tickets from your UW email address
  – Allows tickets to be tracked on MyRequests
  – Easier to view ticket history of submitter

> Reply to Ticket Confirmation Email/ISC Email
  – Replying to the ticket confirmation or ISC email to update your case
  – Most important when cc’ing people on emails to the ISC
    > Reply to ISC email to add comments to case. Selecting reply all to the
      sender’s email will create a new case
Thank you for contacting the Integrated Service Center (ISC).

Your case, [HRP0232199]: TEST SORRY, has been submitted.
CALLING THE ISC

Tier 1 agents can share general info about benefits processes, but we can not discuss benefit information with anyone but employee.

Tier 1 agents can help with employee-initiated Workday transactions and help troubleshoot commons errors.

However, questions and issues relating to admin-initiated transactions like hires, terminations, compensation changes, etc., are usually handled by HCM Service Partners.

- So it's easiest and fastest to send an e-mail to ischelp@uw.edu with those questions or to call your HCM Service Partners directly.
INTRODUCTIONS

> Carla Englander
  – Reporting Analyst
  – Academic Human Resources
  – cengland@uw.edu

> Aaron Ford
  – Functional Analyst
  – ISC HCM
  – arford@uw.edu
LOOKING AHEAD

> Periodic asks to resolve specific issues
  > From ISC
  > From Academic HR
> Reports in Workday
IMMEDIATE ASKS

ADDRESS EXPIRED POSITIONS

> R0321 “Upcoming End Employment Dates”
  > Currently over 2500 positions with end dates between Go Live and 2/15/2019

> If the worker is still active:
  > Extend End Date if Employee Type is “Fixed Term”
  > Remove End Date if Employee Type is “Regular”

> If the worker is not active:
  > Terminate
  > Move to Unpaid Academic (if appropriate)
CONSEQUENCES OF ACTIVE POSITIONS WITH END DATES IN THE PAST

- Active Worker Records in Workday cost UW money
- Reports about employees will be inaccurate
- Risk of overpayment (or underpayment) to employees
- Risks related to persistent access to UW resources (email, libraries, buildings, computing systems)
WHEN MAKING POSITION-RELATED UPDATES:

> Look for alignment!
  - Position :: Compensation :: Academic Appointment (when appropriate)
  - Start and end Dates
  - Rank and Comp Grades
  - Sup Orgs, Cost Centers, and Academic Units

> Academic Appointment Business Processes that are kicked off by position changes are necessary

> Please complete this work by March 14 (HCM Transaction Cut Off for Winter Quarter)

> We recommend R0321 be run every pay period
Address Expired Academic Appointments

- “Upcoming Appointment End Dates”
  - Currently nearly 1400 active appointments with end dates between Go Live and 2/27/2019

- If the worker still holds the appointment:
  - Extend End Date (via Update Academic Appointment BP)

- If the worker does not hold the appointment any longer:
  - End the appointment

- Appointment actions need to be processed separately from Position actions
CONSEQUENCES OF ACTIVE APPOINTMENTS WITH END DATES IN THE PAST

> Causes errors loading data to EDW (Enterprise Data Warehouse)
  - This affects data available in MyGrad and other systems

> Report outputs will be inaccurate
  - Reappointments (R0555)
  - Faculty Senate Voting Eligibility (R0237 and R0448)
  - Review Dates for Clock-Managed Titles (R0353.1 and R0353.2)

> Harder to understand the individual’s current academic relationship with the university
WHEN MAKING APPOINTMENT-RELATED UPDATES:

> Look for alignment!
  - Position :: Compensation :: Academic Appointment (when appropriate)
  - Start and end Dates
  - Rank and Comp Grades
  - Sup Orgs, Cost Centers, and Academic Units

> Alignment within Academic Appointments is also important:
  - Primary :: Joint :: Dual

> Please complete this work by April 1

> We recommend “Upcoming Academic End Dates” be run each academic quarter
ACADEMIC TITLE

CHANGES

JIM BALLEW
Asst. Director – Academic Personnel Operations

UNIVERSITY of WASHINGTON
INTEGRATED SERVICE CENTER
AGENDA

- Changes to Lecturer Titles
- Addition of Sr. Lecturer Title
- Postdoctoral Scholar - Conditional
# LECTURER TITLE CHANGES

## CONSISTENCY OF TITLES ACROSS ACADEMIC RANKS AND JOB PROFILES

<table>
<thead>
<tr>
<th>Former Academic Rank Name</th>
<th>Former Job Profile Name</th>
<th>New Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lecturer Full-time</td>
<td>Lecturer Full-Time</td>
<td>Lecturer Full-Time</td>
</tr>
<tr>
<td>competitive recruitment</td>
<td>Competitive Recruitment</td>
<td></td>
</tr>
<tr>
<td>Lecturer Part-time</td>
<td>Lecturer P-T</td>
<td>Lecturer Part-Time</td>
</tr>
<tr>
<td>competitive recruitment</td>
<td>Competitive Recruitment</td>
<td></td>
</tr>
<tr>
<td>Lecturer Full-time</td>
<td>Lecturer Full-Time,</td>
<td>Lecturer Full-Time</td>
</tr>
<tr>
<td>Temporary</td>
<td>Temporary</td>
<td>Temporary</td>
</tr>
<tr>
<td>Lecturer Part-time</td>
<td>Lecturer Part-Time</td>
<td>Lecturer Part-Time</td>
</tr>
<tr>
<td>Temporary</td>
<td>Temporary</td>
<td></td>
</tr>
</tbody>
</table>

> Changes have been updated in Workday as of January 24
SENIOR LECTURER TITLE CHANGES

CONSISTENCY OF TITLES ACROSS ACADEMIC RANKS AND JOB PROFILES

<table>
<thead>
<tr>
<th>Former Academic Rank Name</th>
<th>Former Job Profile Name</th>
<th>New Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Senior Lecturer Full-time</td>
<td>Senior Lecturer-Full Time</td>
<td>Senior Lecturer Full-Time</td>
</tr>
<tr>
<td>Senior Lecturer Part-time</td>
<td>Senior Lecturer-Part Time</td>
<td>Senior Lecturer Part-Time</td>
</tr>
</tbody>
</table>

> Senior Lecturer Part-Time (Quarterly)
  - Academic rank and job profile being added to Workday
  - “Annual or Shorter” job family (not natively benefits-eligible)
  - Will not show up on R0555 (Reappointments) or R0237 (Voting Faculty) reports

> Changes currently under review by ISC
  - Anticipated to go live in March

Changes currently under review by ISC
- Anticipated to go live in March
POSTDOCTORAL SCHOLAR-CONDITIONAL

> Appointment for postdoctoral candidates who have completed all coursework but have not yet had degree confirmed
> Units no longer able to use “Visiting Scientist” title for postdocs
> New title currently under review by ISC
  – Anticipated to go live in March
> Will have additional information at the AHR Spring Admin Forum on March 5
WORKDAY 32

UPDATES

PAULA ROSS

UNIVERSITY of WASHINGTON
INTEGRATED SERVICE CENTER
WORKDAY 32 UPDATES

> Inbox app on the homepage is being removed
> Your Social Security number, as well as the Social Security number for your dependents, will now be fully masked in Workday (the last four digits are no longer on display)
INBOX CHANGES
OPTIONAL LTD
SPECIAL ENROLLMENT

GINNY MONTGOMERY

UNIVERSITY of WASHINGTON
INTEGRATED SERVICE CENTER
OPTIONAL LTD ENROLLMENT IN MARCH

- From March 1 through 31, 2019, there will be a special, one-time open enrollment opportunity for optional long-term disability insurance.

- Employees can enroll or reduce their waiting period without providing evidence of insurability (proof of good health).

- Changes made during March 2019 will be effective May 1, 2019.
PAID FAMILY & MEDICAL LEAVE & OPTIONAL LTD

> Starting January 1, 2019, new employees enrolling in optional LTD are not be able to choose a 30-day or 60-day waiting period

> The shorter waiting periods will be replaced by the new Paid Family & Medical Leave program, which will offer eligible employees 12 to 18 weeks of paid leave after a qualifying event

> By January 1, 2020, all employees on a 30-day or 60-day waiting period will have their benefit waiting periods moved to 90 days
New look coming soon: moving to UW’s Marketo
Opportunity to make changes!
This newsletter is for YOU. Let me know:
  – Is there a different day/time you’d prefer to receive ISC newsletter?
  – Any changes you’d like to see? New columns? Features? Ideas?
Feel free to share your thoughts at any time
  – Email ischelp@uw.edu
THOUGH PLEASE REMEMBER: IT’S JUST ME!
TRAINING UPDATES

KANANI DONALDSON

UNIVERSITY of WASHINGTON
INTEGRATED SERVICE CENTER
TRAINING UPDATES

> Transition to Population based training began earlier this month
  – Training focused on the populations you support as it pertains to your security role

> Launched Workday Fundamental: Students eLearning suite
  – 3 modules covering the entire ‘life cycle’ of student employees, including undergraduates and graduates
  – Includes instructional videos, hands-on activities, knowledge checks, and more!
QUESTIONS AND ANSWERS
What is the timeframe to do a direct deposit reversal?

- A direct deposit reversal request must be received by NOON, the day after the gray day on the Payroll Calendar. Requests sent by this deadline guarantee the funds will be returned.
- Send a ticket with the subject line “Direct Deposit Reversal” and note that the employee is aware that this will take place.
- Reversals processed within 5 days after pay day may take 3-5 business days for the money to return from the bank. Reversals initiated after may take longer to recover. If an On Demand Check is needed for partial pay, it cannot be issued until the direct deposit money has been returned from the bank. Note: Initiating a reversal does not guarantee the money will be returned.
- If it is a complete overpayment, you do not need the employee’s permission for the reversal, but it is IMPORTANT to notify them.
For a reversal, how far back can you request?

- If you have an issue that is more than a few months, contact the payroll team for assistance by emailing ischelp@uw.edu
- NOTE: We cannot do the prior year as it will effect taxes
TPI/TSI REFRESHER

> How different is TPI from using Period Activity Pay? Are they interchangeable?
>  - They are not interchangeable. TPI is traditionally initiated by the same department when a worker is taking on additional duties within the department on a temporary basis. Period Activity Pay can be initiated by a different department for duties a worker is performing that is not within their Sup Org. Period Activity Pay is also typically for shorter periods of time, and is utilized more often for teaching activities.

> It has been discussed to make available a compensation tool for campus. Is there a status?
>  - The tool is being worked on. We need to ensure all involved CBU’s sign off on the definitions and guidance prior to publishing.
In the past, we have used TPI to supplement compensation while waiting for an approval on a position review. This can create an overpayment when the position review is approved and is implemented retroactively.

- TPI’s should not be used solely to offset a worker’s compensation during a position review. We should wait for the position review to be approved and the pay increase to go into effect. We should also consider that the position review may not be approved, which would create an overpayment. If the employee is receiving a TPI for performing additional/higher level duties prior to the position review, the position review should be future-dated so that it does not overlap with the TPI, which would also cause an overpayment.
QUESTIONS AND ANSWERS

TPI/TSI REFRESHER

> Is there a report to pull that shows employees who have ADS’s, TPI’s, etc.?
  – Yes. Most of the Earnings and Actuals reports will show this information (i.e., R0100, R0101, R0101.2 for example). Within these reports you can filter by ‘Earning’ to see only the earn types you need.

> Can TPI be entered retroactively?
  – Yes, it can be. To mitigate mistakes, we should ensure it is entered in a timely manner.
Will the user guides for compensation changes be updated for TPI and TSI?

- We will review the user guide for ‘Request Compensation Change – Staff Campus’ for updates/edits.
- Please note that some of the user guides have an option to leave feedback, found in the Table of Contents. Please let us know if there are changes, that need to be made utilizing the feedback field.
QUESTIONS AND ANSWERS

DATA INTEGRITY

> I have noticed when I do a termination, the compensation end date does not change. Will this be fixed?
  - There is a change request in progress to eliminate the issue of removing compensation plans upon termination. When the fix is in place, we will communicate it.

> Is there a report you can run to verify academic appointment end dates?
  - Yes. We encourage departments running ‘Upcoming Appointment End Dates’ every quarter.

> Can you provide guidance as to what reason codes to use when initiating Period Activity Pay for academics?
  - This depends on the type of work that is being done. Currently you can review the Period Activity Pay User Guide to determine the best reason code to use. However, the work we are doing to create a more comprehensive compensation tool should assist with this.
Can you provide guidance as to what reason codes to use when initiating Period Activity Pay for academics?

- This depends on the type of work that is being done. Currently you can review the Period Activity Pay User Guide to determine the best reason code to use. However, the work we are doing to create a more comprehensive compensation tool should assist with this.
The changes to titles for lecturers differ between the academic title and in the recruitment.

- The naming of current position titles relate directly to job profiles were input when the position was created. These were not updated in conjunction with changes to new academic titles. The naming convention remains the same for those already in existence. Going forward, you will see the job profile names change when a position is edited for a new recruitment.

Will the Social Security Number still be visible to appropriate security roles that need to see them? For instance I-9 Coordinators?

- Yes, the appropriate security roles will still have visibility.
If someone is currently enrolled and would like to make their waiting period longer, do they make the change in January or March?

- You can make your waiting period longer at any time. You will need to send in the paperwork to the ISC.
- You can only make the waiting period longer with proof of good health.
- Effective January 1, 2020, the 30 and 60 days waiting periods will cease to exist and all employees in those waiting periods will be moved to 90 days.

Is Friday the right day to send the Weekly Digest?

- Weekly Digest will transition to be sent out on Thursdays.