AGENDA

> Academic HR Reminders and Academic Appointment Best Practices – Academic HR
> Student Employee Best Practices and Service Partner Realignment – ISC Tier 2 HCM Service Partners
> Suspended Operations Overview – ISC Application Management
> Verification of Employment Outsourcing – ISC Tier 1
> Summer Hiatus/Cyclic Leave Timeline – ISC Service Support
> Open Questions and Answers
REMINDERS/REQUESTS

> Promotion and Tenure
  – **March 15**: Mandatory Promotion and Tenure letters sent
  – **May 17**: Non-Mandatory Promotion and Tenure letters to be sent
  – Promotions will be loaded into Workday centrally

> Reappointments
  – “December” reappointments uploaded into Workday
  – “Spring” will be uploaded in a few weeks
REMINDERS/REQUESTS

> Recruitment

- **July 30**: Non-hiring plan searches opened prior to Interfolio implementation need to be closed
- Any searches from this group units wish to continue will need to be moved into Interfolio
- **July 1**: Anything leftover outside of Interfolio will be removed
REMINDERS/REQUESTS

> Hiring Plans
  – **June 1**: Admins can modify existing 2018-19 hiring plans until this date. On June 1 the 2018-19 plan is frozen (cannot add to or change), but hires can still be made off of plan.
  – **September 1**: The 2018-19 hiring plan expires. If units haven’t at that point had the 2019-20 plan approved, they are not permitted to do any hiring-plan hires.
  – As soon as 2019-20 plan is submitted and approved, it immediately supersedes previous year’s plan and is active.
  – Please contact Laura Thriftwood (lwood3@uw.edu) with specific hiring plan questions.
REMINDERS/REQUESTS

> Spring Cleaning 2019
  – **April 25:** Cleanup lists will be distributed to Dean’s offices
  – AHR Specialists, ISC Academic Service Partners and Carla Englander are available to discuss lists, actions needed with units
    > Please invite us to your regular unit meetings!
  – **June 15:** Corrections due in Workday
REMINDERS/REQUESTS

> Spring Cleaning (cont’d)
  - Scope
    > Appointment Identifiers (Primary, Dual, Joint, Admin)
    > End Dates (Appointments, Positions, Compensation Plans)
    > People missing academic appointments
    > People missing positions
ACADEMIC APPOINTMENT AND POSITION NAVIGATOR TOOL

- Providing guidance on Workday entries and selections for academic appointments and positions in the Academic Personnel Job Family Group
- Will be included with the files sent to Dean’s offices
- Link will be posted on the Academic Personnel website
- Effective date will be noted on the first tab
- Will be updated as we add and update academic ranks and job profiles
- Feedback on included data is welcome
ACADEMIC APPOINTMENT AND POSITION NAVIGATOR TOOL

> Academic Appointments
  – Job Profiles eligible to be the related position
  – Appointment identifiers
  – Appointment duration

> Positions in the Academic Personnel Job Family Group
  – Academic rank of the primary appointment
  – Employee type
  – Service Period
  – PM or JM Sup Orgs
  – Employment Durations
BEST PRACTICES FOR STUDENT EMPLOYMENT

ZOE KOOL & COURTNY NIELSEN
HCM Service Partner – Staff Specialists
UNIVERSITY of WASHINGTON
INTEGRATED SERVICE CENTER
CONSIDERATIONS FOR HIRING STUDENTS

> Determine whether student has an existing job in Workday
> Look at current End Employment Date
  – Determine whether to Start Additional Job or do a Lateral Move/Transfer
> Communicate with other departments and the student employee
  – Do not assume another department’s intent
> Ensure FTE is not greater than 100% for salaried grad students
> Whenever possible, Hire/Add Job for students should be initiated 2-4 weeks prior to effective date of employment
STUDENT EMPLOYMENT MAINTENANCE

> Helpful report: R0321 Upcoming End Employment Dates
  
  – Run every pay period
  – Look for anyone who’s end date has already passed

> Assess whether the student job will continue
  
  – Extend the student job utilizing Student Data Change in the Change Job BP if the student will continue to work
  – Initiate an End Additional Job or Termination BP if the job has finished
IMPORTANCE OF END JOB/TERMINATE

> I-9 compliance
> Prevent overpayments
> Facilitate hiring/job changes
> Keep student records accurate (data integrity)
  - Document breaks in service of one day or longer
HCM SERVICE PARTNER REALIGNMENT

Amiee Kehrer, Director of HCM Operations
NEW STRUCTURE EFFECTIVE 4/1/2019

- Support divided by population and department
  - Greater number of assigned departments, but greater specialization for specific populations.
- Service Partners provide support in pairs, approach consultations and specialized projects as a team.
- Service Partners are expected to retain a high level of specialized knowledge pertaining to their assigned population – either academic or professional/classified/student staff.
- Clear support path, greater utilization of expertise across HCM Service Partners.
EMAIL BEST PRACTICES

To route your requests to your Service Partner as quickly as possible, please include the following:

– Your Major Sup Org (eg. CAS, ENG, SOM)
– Population Type (eg. Academic or Staff)
– Sup Org Name/EID/Business Process related to your question
– Urgency, when applicable

Example:

ENG – Academic, EID 00000000, entering period activity pay
SUSPENDED OPERATIONS OVERVIEW

Tram Obligacion
EMPLOYMENT VERIFICATION UPDATE

Lyndsey Baldwin

UNIVERSITY of WASHINGTON
INTEGRATED SERVICE CENTER
EMPLOYMENT VERIFICATION

> What is an employment verification?
  > Verifying your wage and/or employment history in order to secure a mortgage, buy a car, rent an apartment, etc.

> Tier 1 fulfills an average of 1,300 employment verifications each month (28% of overall cases resolved monthly by Tier 1)

> Current state 2-3 business day turnaround time

> Workday provides the ability to report history, compensation plans, and positions in a way that HEPPS could not
BENEFITS OF OUTSOURCING

> Eliminates turnaround time
  – 24/7 access
  – Instant verification

> Improved security
  – Complete audit trail of every verification is available to employees
  – Validate the identity of users
  – Multi-factor Authentication

> No cost to the University of Washington
OUTSOURCING TO i2VERIFY MAY 1

NEW PROCESS

> Will be posted on our website May 1
  – Website: www.i2verify.com
SUMMER HIATUS/CYCLIC LEAVE TIMELINE

Kanani Donaldson, ISC Training Manager
SUMMER HIATUS

TIMELINE

> Now: run R0047 to review Faculty Service Period
> May 31 (12:00 p.m.): deadline for units to complete and return R0047 Summer Hiatus Audit Report to ISC indicating academic personnel who will be on Summer Hiatus for the ENTIRE summer (June 16 – September 15)
> May 31 (5:00 p.m.): ISC will place academic personnel included on the report on Summer Hiatus in Workday via EIB
SUMMER HIATUS

TIMELINE

> June 3 – June 7 (12:00 p.m.): Units will rerun R0047 to validate leave data AFTER the Summer Hiatus EIB has been loaded into Workday

> June 7 (12:00 p.m.): deadline for submitting any changes to the ISC

> June 25: Academic Personnel who are on Summer Hiatus for the ENTIRE summer, and who are benefits-eligible, will see septuple deductions on the June 25 paycheck
SUMMER HIATUS

TIMELINE

> September 16: the ISC will perform a mass return of all academic personnel who are on Summer Hiatus with an ‘Estimated Return Date of Leave’ of September 15
  – Does NOT matter if they were put on Summer Hiatus via EIB or manually by the department

> September 17 – 27 (5:00 p.m.): units will verify individual FTE and positions for all academic personnel returned from Summer Hiatus. All changes must be made in Workday BEFORE 5:00 p.m. on September 27
CYCLIC LEAVE

TIMELINE

> Now: run R0047.1 to review Staff Service Period

> June 7 (12:00 pm): deadline for units to place eligible staff on Cyclic Leave in Workday
  – IMPORTANT: return employees currently on Leave of Absence before placing them on Cyclic Leave

> June 25: Employees on Cyclic Leave will see septuple deductions on the June 25 paycheck
QUESTIONS AND ANSWERS
QUESTION AND ANSWER

Academic HR Reminders
> Will the promotion uploads include affiliate and annual clinical promotions?
  – Yes, the upload will include all promotion types.

Student Employee Best Practices
> Can you clarify when the lateral move vs a transfer is the appropriate business process?
  – When moving student employees between Sup Orgs where you DO NOT have a supporting role in the Sup Org the student currently resides, a transfer will need to be initiated first. If you have support roles in both the current and receiving Sup Orgs, then you can initiate a lateral move.

> Can you clarify on what the end date should be for student employees?
  – If the student employee has no additional jobs and does not know if they will return after a break, they should be terminated.
Student Employee Best Practices

> When terminating a student employee, what is the best practice for the secondary reason, leaving Washington state service, or moving to another state agency?
  – You always want to use leaving state service for student employees, unless you know the student is moving to another state agency.

> How do you know when to extend an end date versus a termination?
  – The ISC has provided the opportunity to extend HOURLY student employees until the end of the next academic year if you KNOW they will be returning after a break (primarily summer). This option can be used as opposed to termination. If the student employee does NOT return, retro date the termination to when they last worked.

> So you can extend the employment date, but you wouldn’t have compensation entered until you have a new start date?
  – Extending the end date is ONLY for hourly students, and the compensation end date should always match the position end date. If extending the position through the next academic year, the compensation should be extended as well.
Student Employee Best Practices

> What turn-around time can we expect from the ISC for approvals of student hires? I have had issues where the 3 day window has passed, and it’s resulted in an overpayment.

- When possible, enter student employee hires into Workday 2 – 4 weeks prior. The purple day on the calendar is cut off for the current pay period for transactions to have reached Service Partner's inbox, not the final day of Service Partners to approve transactions, or for departments to initiate the transaction. For transactions that reach the Service Partner's inbox after 5 p.m. on the purple day, or if you have a concern about a hire getting completed in a timely manner, please call your service partner.

> Does the ISC have guidance on how to enforce the 3 day rule for I-9 completion? If 3 days have passed, do the departments have the authority to terminate the student employee?

- This is a compliance issue, not a transaction one. The ISC is working with central HR on a policy around what to do in these scenarios. We need to have guidance from central HR on defining a policy for this. When we have guidance, it will be communicated.
Can central HR factor in that the payroll calendar does not match the academic calendar?

- We will work with central HR to factor in all complexities. We would like to take a ‘snapshot’ to see how we are currently doing with I-9 compliance. We are working on that ‘snapshot’ and will share the information with HR.

In the examples for how to submit tickets, do you have to type out the whole Sup Org name?

- No. For instance, School of Medicine, you could type SOM.

Do you have to include the population on every ticket? Even if it’s an email you’re forwarding?

- The Sup Org and population should be included on the subject line whenever possible on every ticket, even those that are forwarded from an existing email. If adding this information is accidentally missed, it will still be routed to the Service Partners, but providing that additional information helps to expedite getting the ticket to either your academic or staff Service Partner with greater efficiency.
  
**QUESTION AND ANSWER**

**Suspended Operations Overview**

> If it is before the 90 days are up and an employee wants to use vacation to make up the time, can they?
  - Yes. It is recommended that employees make a correction to reduce their Suspended Operations Time off (back in February) and enter Vacation Time Off on that day. If the employee did not have enough Vacation at the point of Suspended Operations, they can use the Repayment for Suspended Operations Make Up Time form on the ISC website. The form can be submitted as an attachment to a ticket.

> What if it is after the 90 days?
  - Fill out the Repayment for Suspended Operations Make Up Time form on the ISC website. The form can be submitted as an attachment to a ticket. (Your Pay & Taxes > Payroll Processes > Overpayments)

> What about employees who were on FMLA during Suspended Ops make up window? Can these employees use any type of extensions?
  - UWHR does not grant extensions of the 90 day make up window. The employee should not have elected to make up the time when they were unable to do so.
Suspended Operations Overview

> If they make up time in the morning, where do we track the time, morning or afternoon?
  
  – Find the overtime. Go to the View and Calculated tabs. See where the overtime actually hits and tag it there. R0521.1 will help you find the time calculation tags and see whether it hit as overtime or Suspended Operations.

> I have 2 employees with .25 hours left over and they cannot add anymore time without getting an error.
  
  – For .25 hours, the Time and Absence Initiate (TAI) can select Hours Worked (No Rounding). This will stop Workday from rounding the time up. The employee should enter 10 minutes worked. Time and Absence Initiates can go back in and update the time entry code to no rounding, and that will get rid of the error. The TAI will likely need to assist all workers with this. We do not expect regular usage of this time entry code during the make up window. It should be used closer to the end to get the balance as close as you can to zero. NOTE: if you are a manager and a TAI, you will not be able to use No Rounding. If you do not have a back-up, submit a ticket to the ISC.
Suspended Operations Overview

> How does an employee record time if they teleworked during Suspended Operations? Would this be make up time or REG time?
  - This is Hours Worked. Suspended Operations Time Off is only used if you did not work and are expecting to make it up within the 90 day window.

> Are there plans for adding exempt staff to Suspended Operations?
  - Currently, there are no plans to open time tracking to exempt employees, and thus they would not be added to Suspended Operations.

> What report can I use to see all the Suspended Ops Time Off Balances for my org?
  - R0044, be sure to select the Suspended Operations Time Off Plan in the prompt
Question and Answer

Suspended Operations Overview

> Is there a resource that will identify what the 90 day deadline is?

> Would it be possible to update, or clarify, the Suspended Operations user guide to make it a bit clearer to the employee? For those employees who had never encountered this before, it was a bit difficult to figure out.
  – The ISC will review the user guide and update as needed.
Verification of Employment

> Can employment verifications include practice plan for clinical faculty? They are paid via CUMG or UW Physicians.
  - Currently, no. they would need to work with their department for documentation.

> We had an issue with someone who was on leave, but the department did not return the worker from leave in Workday. Could this happen again?
  - It would be the same. If you are on leave in Workday, i2Verify will see that the worker is on leave. It is important for the departments to return workers from leave in Workday in a timely manner. i2Verify has contact information for SME’s at UW in the ISC.

> Will the verify email alias still be used?
  - It will be retired at the end of the month (April). It will stop sending tickets to the ISC. It will have an auto response with directions of how to proceed.

> How does the company know they are authorized to ask?
  - Documentation from bank and other vendors will often have the necessary info for authentication. Either way, the vendor and/or the employee would need to have an account with i2Verify.
QUESTION AND ANSWER

Verification of Employment

> What about those who are not ‘tech savvy’ or would prefer not to use a computer?
  > You can call i2Verify for assistance.

> Can we stop completing employment verifications at the department level?
  > Yes, please! Credentialing will still need to happen at the department level. Due to increased security, please refer all employment verification requests to i2Verify.

> At the department level we often get calls or receive documents directly to complete for employment verification. Should we continue to complete these requests at the department level, or send to i2Verify?
  > As mentioned, after May 1, please direct ALL requests to i2Verify (with the exception of credentialing).
Verification of Employment

> Will i2Verify confirm previous employment? If so, will they be able to verify previous employment prior to Workday?
  - Yes, the ISC sent historic files for five years prior to Workday being implemented.

> What about requests from third party employment/career verification companies (not for salary verification), who typically ask for dates and titles, not salary?
  - Credentialing will still need to happen at the department level. Due to increased security, please refer all employment verification requests, including those requesting dates and titles, to i2Verify.