OCTOBER 2019 – NSC NETWORK MEETING
AGENDA

- Open Enrollment – Ginny Montgomery
- Merit Highlights – Paula Ross
- Postdoctoral Updates – Kanani Van Leeuwen
- Report Adoption Survey Results – Karen Matheson
- Report Adoption Next Steps – Kanani Van Leeuwen
- UW Climate Survey – Erin Rowley
OPEN ENROLLMENT

GINNY MONTGOMERY

UNIVERSITY of WASHINGTON
INTEGRATED SERVICE CENTER
OPEN ENROLLMENT

> PEBB Benefits annual Open Enrollment is November 1-30, 2019
> Open Enrollment is done in Workday for all UW employees. UW does not use the HCA portal or paper for Open Enrollment.
  – Notification will go out from Workday to all PEBB eligible employees that Open Enrollment is available in Workday on November 1st
  – Employees will receive reminders during the month of November
  – Employees will have until the evening of November 30th to complete their Open Enrollment
> The ISC is closed November 28th-30th for the Thanksgiving holiday weekend
OPEN ENROLLMENT

> The ISC website is your starting place for Open Enrollment help
  > The Open Enrollment page is part of the *Your Benefits* section of the ISC website

> Employees who want to make changes during Open Enrollment should do so as early in November as possible
  > Employees should review their address in Workday to ensure it is accurate
  > Employees may be contacted by the ISC if something is missing, they should respond asap to ensure all updates are successful for Open Enrollment

> ISC staff are available to help during normal business hours
  ISC is closed November 28th-30th for the Thanksgiving holiday weekend
OPEN ENROLLMENT

Tips and Tricks for Open Enrollment

- Review the website documentation to determine if you need to participate in Open Enrollment (If the answer is “No”, there is nothing else to do)
- If you are enrolling new dependents, be sure to review the Dependent Verification requirements
- If you make and changes as part of Open Enrollment, be sure to validate that all of your dependent coverage is accurate
  > The final page verifies who is enrolled
  > If anything says “Employee Only” then you do NOT have any dependents covered
  > Medical and Dental coverage requires you to enroll dependents in each plan separately

> The ISC is closed November 28th-30th for the Thanksgiving holiday weekend!
OPEN ENROLLMENT

> Benefit Fair Dates
  – Tuesday, October 29th 10am-3pm
    > Health Sciences Building, 3rd Floor Lobby
  – Wednesday, October 30th 10am-3pm
    > Harborview, Maleng Building Rooms 111/112
  – Thursday, October 31st 10a-3pm
    > HUB, North Ballroom

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MERIT HIGHLIGHTS

PAULA ROSS

UNIVERSITY of WASHINGTON
INTEGRATED SERVICE CENTER
MERIT HIGHLIGHTS

> **10,368** – Number of merit loads including Professional Staff, Library, Other Academic Personnel

> **6,149** – Number of merit loads for Faculty

> **47/48** – Number of UW Connect tickets submitted and resolved*

* One on hold pending customer
OVERVIEW

- Broad overview of changes
  - New Bargaining Unit represented by UAW
  - Changes to their pay and benefits
  - Part of Academic Personnel Job Family, Indefinite/Multi-Year and new Academic Personnel Job Family, Postdoctoral Scholars
  - Position Management
  - Business Process Transactions will route to AHR for review and approval
  - Moving from current jobs into new positions, job profiles, and comp plans
POSTDOCTORAL JOB PROFILES

CURRENT TITLES

- Research Associate
- Senior Fellow
- Research Associate - Trainee
- Senior Fellow - Trainee

NEW TITLES

- Postdoctoral Scholar
- Postdoctoral Scholar - Fellow
- Interim Postdoctoral Scholar

Postdoctoral Scholar Conditional/Fellow Conditional: Conditional is a designation, not a title. For Workday purposes, it will be a job title.
OVERVIEW

> Two Groups
  - Postdoctoral Scholars - About 800 employees
  - Postdoctoral Fellows - About 200 employees
  - 4 new job profiles + 1 existing
    ■ Postdoctoral Scholar (E S UAW Postdoc)
    ■ Postdoctoral Scholar Conditional (E S UAW Postdoc) - existing
    ■ Interim Postdoctoral Scholar (E S UAW Postdoc)
    ■ Postdoctoral Scholar - Fellow (UAW Postdoc)
    ■ Postdoctoral Scholar Fellow Conditional (UAW Postdoc)

> Contractual changes effective 8/1/2019
  - Implementation for the 9/16 - 9/30 pay period and 10/10 pay date
  - All changes planned to be deployed into production by 10/4
  - Configuration retroactive back to the 8/1 start date
OVERVIEW

> Scholars paid salary based on FTE
  - REG earn type
  - Benefits deductions are pre-tax

> Fellows paid via stipend
  - No taxes withheld
  - New Period Activity Pay Types
    - PA22 - UAW Postdoctoral Scholar Stipend with Benefits
    - PA23 - UAW Postdoctoral Scholar Supplement (top up)
  - New Earn Type - “SFP-UAW Postdoctoral Scholar/Fellow Stipend”
  - Benefits deductions are post-tax
  - Fellows will have FTE even though it does not impact pay
OVERVIEW

> Contract provides for annual compensation change based on Anniversary Date
  - Compensation changes will be initiated by departments and route to AHR for approval
  - Anniversary date is a new custom object (NOT anniversary date that is part of service dates)
  - Added a To Do for initiators on the Hire, Change Job, Request Comp Change and Period Activity Pay business processes to add or adjust anniversary date
  - Applies to both Scholars and Fellows
After reviewing the data in Workday, if I see data for a scholar or fellow I think might be incorrect, should I submit a UW Connect ticket, or reach out to AHR to correct it?
  – Please submit a ticket at ischelp@uw.edu

Are Postdoctoral Scholar – Fellows eligible for one-time payments such as moving expenses (MEA) or awards (AWD)?
  – Since payroll taxes are not taken from stipends, we are working with multiple departments and the union to determine this. More information will be communicated.

Who should Scholars and Fellows contact if they have questions about any of the changes?
  – They should contact their union representative with contract-related questions. Payroll and other questions should first be addressed to the department/dean’s office administration.
QUESTIONS

> If a Fellow has questions about federal tax withholding or changes to their deductions in their pay, who should they contact?
  – Payroll taxes will not be taken from stipends. As such, fellows should consult with a personal tax professional about potential tax obligations.

> Will Scholars/Fellows need to do anything differently now?
  – Effective October 4, 2019, Postdoctoral Scholars and Fellows will enter Sick/Vacation Time Off in Workday. For assistance please reference the Enter Absence user guide
  – [https://isc.uw.edu/user-guides/enter_absence/](https://isc.uw.edu/user-guides/enter_absence/)

> What is the recommended approach for costing allocations for Period Activity Pay? Should I use Cost Override or Costing Allocations? Or both?
  – Best practice is to use costing allocations based on the earn type. Please reference the Costing Allocations user guide for more direction. This allows costing to carry forward.
  – [https://isc.uw.edu/user-guides/assign_costing_allocations/](https://isc.uw.edu/user-guides/assign_costing_allocations/)
QUESTIONS

> What earn type should I use for Postdoctoral Scholar – Fellow stipends?
  – The new earn type is SFP. PA22 is for the base, and PA23 is used for the ‘top up’.

> Are Interim Postdoctoral Scholars only available to UW graduates? What about other Postdoctoral Scholars from other universities?
  – Interim is only available to UW graduates. It is NOT available to scholars from other universities.

> Does it have to be documented if the department or PI is changing a Postdocs stipend/compensation?
  – If someone is getting a change to their stipend/compensation, they should get a letter outlining the changes. Please refer to the Academic HR Titles and Ranks page for more information.
WORKDAY REPORTS SURVEY
RESULTS

Karen Matheson
Reporting Application Manager

UNIVERSITY of WASHINGTON
INTEGRATED SERVICE CENTER
SURVEY BACKGROUND

> Audience

> Emailed 209 NSCs
  – 87 Responses
  – 42%
GOALS

Survey Purpose

> Establish baseline for upcoming RAP transformation
GOALS

Survey Purpose

> Establish baseline for upcoming RAP transformation
GOALS

Survey Purpose

> Establish baseline for upcoming RAP transformation
GOALS

Survey Purpose

> Establish baseline for upcoming RAP transformation
> Assess frequency of interaction with Workday reports/tasks
> Assess comfort with Workday reporting
> Understand different reporting usages
> Understand current reports utility as well as pain points

*Solicit focus group participants*
SURVEY TAKERS

Primary Job Responsibility

- HR Manager: 35
- Administrator: 19
- Payroll/Fiscal Specialist: 17
- Other: 16
SURVEY TAKERS

Unit Size by # Employees

- 1-50: 11%
- 51-100: 14%
- 101-150: 9%
- 151+: 66%

Shared Services Support Model

- Yes: 35%
- No: 65%
### SURVEY TAKERS

**Works in Shared Services Model?**

<table>
<thead>
<tr>
<th>Unit Size</th>
<th>7</th>
<th>22</th>
</tr>
</thead>
<tbody>
<tr>
<td>Small &lt;150</td>
<td>7</td>
<td>22</td>
</tr>
<tr>
<td>Large</td>
<td>22</td>
<td>32</td>
</tr>
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</table>
REPORT TASK FREQUENCY - HOW OFTEN DO YOU...

- Search for report: 34% Daily/Weekly, 55% Monthly/Quarterly, 4% Annually, 7% Never
- Run reports: 72% Daily/Weekly, 22% Monthly/Quarterly, 6% Annually, 6% Never
- Export report data: 67% Daily/Weekly, 27% Monthly/Quarterly, 2% Annually, 4% Never
- Transact in Workday: 88% Daily/Weekly, 6% Monthly/Quarterly, 6% Annually, 4% Never
COMFORT WITH WORKDAY REPORTING

- Finding names of reports I need to run
- Understanding report output
- Using report data for intended purpose
- Summarizing data from report download
- Filling out details needed to run a report

<table>
<thead>
<tr>
<th>Activity</th>
<th>Very Comfortable</th>
<th>Comfortable</th>
<th>Uncomfortable</th>
<th>Very Uncomfortable</th>
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</thead>
<tbody>
<tr>
<td>Finding names of reports I need to run</td>
<td>10%</td>
<td>52%</td>
<td>29%</td>
<td>10%</td>
</tr>
<tr>
<td>Understanding report output</td>
<td>16%</td>
<td>39%</td>
<td>42%</td>
<td>3%</td>
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<tr>
<td>Using report data for intended purpose</td>
<td>23%</td>
<td>52%</td>
<td>26%</td>
<td>3%</td>
</tr>
<tr>
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<td>23%</td>
<td>42%</td>
<td>35%</td>
<td></td>
</tr>
<tr>
<td>Filling out details needed to run a report</td>
<td>29%</td>
<td>61%</td>
<td>6%</td>
<td>3%</td>
</tr>
</tbody>
</table>
REPORTS HELP

Rank in order where you go for Workday Reporting questions.

<table>
<thead>
<tr>
<th>Category</th>
<th>1st</th>
<th>2nd</th>
<th>3rd</th>
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<tbody>
<tr>
<td>ISC REPORTS PAGE</td>
<td>52%</td>
<td>34%</td>
<td>14%</td>
</tr>
<tr>
<td>CO-WORKERS</td>
<td>42%</td>
<td>28%</td>
<td>30%</td>
</tr>
<tr>
<td>SUBMIT A TICKET</td>
<td>7%</td>
<td>37%</td>
<td>56%</td>
</tr>
</tbody>
</table>
REPORTS HELP – OPEN ENDED

Most Common Themes - 32 Responded

“type a key word in the search box in Workday and see what it gives me” (9 or 36%)

‘Contact someone I know who uses Workday or someone in shared services.” (8 or 25%)

“trial and error” (5 or 16%)
WORKDAY REPORT DISLIKES

75 Responses (86%).....

Information Overload (31 or 41%)
> Too many columns, duplicate rows (20)
> Difficulty finding right report (16)
> Too many reports (7)
> Lack of consistency (9)

“Too many reports, don’t know which one will return the data I need”

“It can be tricky to widdle down the data to pull out what is needed and there does not seem to be consistency across reports.”

“Too much information provided”
WORKDAY REPORT DISLIKES

> Use of multiple reports to accomplish task (11)
> Too much manipulation/filtering required (15)
> Security around report and field access (9)

“The basic questions for day to day business require pivot tables and other manipulating of data which adds time to finding the answers.”

“Many of the reports I run are missing one (maybe two) key data points. Need to run two reports to compile data.”

“Difficulty with access - managers do not have some HCM reports”
WORKDAY REPORT LIKES

65 Responses (75%)!

> Ability to easily export/manipulate report data (21 or 32%)

“Easy to download and manipulate in Excel.”

“I like the ability to export data to Excel and modify the format prior to sending to my respective audience, depending on what information they are looking for.”

“It's nice to be able to synthesize information for various purposes (financial, HR, etc.”
WORKDAY REPORT LIKES

65 Responses (75%)

- Availability of various reports/data (19 or 29%)
  
  “Many options depending on what you are looking for”

  “I LOVE the insight they give me on employee details and compensation. I use the current worker detail, academic personnel, and earnings/actuals reports HEAVILY.”

  “Different reports for different needs.”

  “Good way to access accurate and up to date data on employees.”
REPORT ADOPTION NEXT STEPS
FOCUS GROUPS

> Initial focus group
  – Assist in ‘bucketing’ common reports by type
  – End of October
  – Invites will be sent in the coming week

> Future focus groups
  – Assist in prioritizing reports by ‘bucket’
  – Provide feedback for requirements gathering for changes/enhancements to reports

> Determine next steps
YOUR VOICE,
YOUR UW

Erin Rowley, Communications Director, OMA&D
UNIVERSITY CLIMATE SURVEY

OCTOBER 8 – NOVEMBER 8, 2019

> Bothell, Seattle, Tacoma and Seattle Health Sciences
> All undergraduate and graduate students, and faculty and staff affiliated with schools, colleges and administrative departments
> Examines the full range of experiences related to learning, working and living at the UW
> Facilitated by Rankin & Associates Consulting
WHY NOW?

- Recommended by 2017-21 Diversity Blueprint
- Priority for the UW Race & Equity Initiative
- Will inform future campus-level actions
GOALS & RESULTS

> 40% aspirational goal
> Schools, colleges and administrative departments eligible for customized reports with a minimum 30% response rate
> Campus & Health Sciences Reports: May 2020
> Other Reports: Fall 2020
HOW YOU CAN HELP!

> Take the survey
> Encourage others in your units to do the same
> More information: uw.edu/uwclimatesurvey