Council of Principal Investigators Update

May 10, 2017

Brad Blair – Co-Project Manager
Lallah Howard – Functional Lead Manager

Agenda

What’s Happening?

Discussion and Decisions

What’s Next?
What’s Happening?

**Project Activities**

- **System Integration Testing**  
  Cycle 2  
  April 11 – June 1

- **HRO Meeting**  
  May 23 - 24

- **Training Material Development**

- **Payroll Compare Testing**  
  Cycle 1  
  May 22 – June 22

- **Workday Life Event #2 (Core)**  
  Week of June 19

- **Security Role Mapping, Member Decisions on Primary Responsibilities**

- **Data Cleansing**

- **Project and Member Communication**

- **Cycle 2**  
  April 11 – June 1

- **Cycle 1**  
  May 22 – June 22
Go Live December 2017

What is Replaced by Workday?

**Replaced by Workday**
- BPP
- EPAs
- Guardian I-9
- HRConnect
- iBenefits
- LeaveTraq
- PeopleAdmin (PATH)
- TimeTraq

**Staying in Place**
- BusinessObjects
- Buy A&M
- eTravel / Concur
- Glacier
- Maestro
- SSO
- Time & Effort
Impacts on Faculty

**Today**

- Log into multiple systems to accomplish routine tasks
  - HRConnect to view and update address or view your pay slip
  - TimeTraq to view and approve employee timesheets
  - LeaveTraq to request and approve leave

**Workday**

- One streamlined system to log into for multiple functions with enhanced self service capability
  - Timesheet review and approval
  - Leave request and approval
  - Updating personal information like address
  - Updating benefits information like adding a TDA or dependent
  - Updating bank account information or add an additional account (up to 5 are allowed in Workday)
  - Enhanced mobile capability to improve the convenience of accomplishing these tasks
**Delegation**

- Workday functionality allows faculty and staff to delegate most steps in business processes.
- While delegation does not relieve the delegator of responsibility, it does allow the delegate to take action on their behalf.
- There are also specific roles designed to assist managers in performing their HR work, such as Timekeeper and I9 processor.
- With few exceptions, multiple security roles have access to initiate, review and approve various steps in business processes.

**Training Strategy**

```
Sept 18
General Awareness

- Core HR, PAY, BEN
- HR Departmental Processors / Liaisons and Distributed Managers
- Managers

Sept 18
Targeted Awareness
- Sept 18
- Targeted Awareness
- Oct 23
- Skills

Targeted Awareness
- Oct 16
- Skills

Targeted Awareness
- Oct 23
- Skills
```
# From EPP to Save for Summer

<table>
<thead>
<tr>
<th>Save for Summer</th>
<th>Workday’s Multiple Bank Account Feature</th>
<th>Extended Pay Plan</th>
</tr>
</thead>
<tbody>
<tr>
<td>Withhold flat, dollar amount of net pay</td>
<td>Direct % of net pay to one or more checking and/or savings accounts</td>
<td>Withhold % of net pay</td>
</tr>
<tr>
<td>No insurance premiums withheld</td>
<td>Insurance premiums not affected</td>
<td>Withhold % of insurance premiums</td>
</tr>
<tr>
<td>Enroll using a paper form</td>
<td>Enroll electronically in Workday</td>
<td>Enroll using a paper form</td>
</tr>
<tr>
<td>Withdraw at any time; receive held back pay in the next paycheck</td>
<td>Stop additional account deposits at any time; access pay in your checking and/or savings accounts at any time</td>
<td>Withdraw at any time; receive held back pay in the next paycheck</td>
</tr>
<tr>
<td>See your current balance through a Workday report</td>
<td>See your current balance through your bank or credit union</td>
<td>Contact your Payroll Office to see your current balance</td>
</tr>
</tbody>
</table>

## Replacing EPP with Save for Summer

<table>
<thead>
<tr>
<th>Topic</th>
<th>Who is Impacted</th>
<th>Decision</th>
<th>Status</th>
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| Extended Pay Plan (EPP) | 9, 9.5, 10, 10.5 and 11 Month Faculty | Save for Summer program replaces EPP; primary difference is flat $ amount of net pay held back instead of % of net pay | • March  
  – Program socialized with Payroll Offices  
• April  
  – Customizable participant letter sent to HROs, Payroll Offices to distribute to member participants  
• Fall  
  – Customizable participant letter reminding of January 2 change  
• January 2, 2018  
  – EPP participants on Save for Summer  
• April, 2018  
  – Letter introducing Workday’s multiple bank account feature |
Discussion